

Software:

| Software | | | | | |
|-------------------------------|---------|---------|-------------------|---------|-----------------|
| Financials > Sales | | | | | |
| Search Filters | | | | | |
| Action | : | Targets | Sales Executive * | : | << Active SE >> |
| | | | Financial Year * | : | FY 2022 |
| Search | | | | | |
| Selected SE : << Active SE >> | | | | | |
| Targets | | | | | |
| Sales Executive | 2022_Q1 | 2022_Q2 | 2022_Q3 | 2022_Q4 | Total (\$) |
| Summary | 725,046 | 752,443 | 3,713,157 | 724,316 | 5,914,962 |
| Ajay Malgaonkar | 0 | 0 | 0 | 0 | 0 |
| Software : Influence | 0 | 0 | 0 | 0 | 0 |
| Software : New Resell | 0 | 0 | 0 | 0 | 0 |
| Software : Recurring | 0 | 0 | 0 | 0 | 0 |
| Amit Mehta | 0 | 0 | 0 | 0 | 0 |
| Software : Influence | 0 | 0 | 0 | 0 | 0 |
| Software : New Resell | 0 | 0 | 0 | 0 | 0 |
| Software : Recurring | 0 | 0 | 0 | 0 | 0 |
| Anant Gupta | 0 | 0 | 0 | 0 | 0 |
| Software : Influence | 0 | 0 | 0 | 0 | 0 |
| Software : New Resell | 0 | 0 | 0 | 0 | 0 |
| Software : Recurring | 0 | 0 | 0 | 0 | 0 |
| Bala Siddeswar Peddi | 0 | 0 | 0 | 0 | 0 |

Filters:

Targets:

- **Action:** when you selected **Targets** in Action field based on sales executive Software targets will show.
- **Sales Executive:** In Sales Executive filter there are three types.
 - All SE: It shows combination of Active and Inactive Sales Executives.
 - Active SE: if you select Active SE, It shows Active sales executive data.
 - Select SE: In select SE, you can select one or multiple sales executives
- **Financial Year:** In default current financial year is selected and also can select past and future years to get data.

Targets:

Based on Sales Executive Software targets (Influence, New Resell and Recurring) will show on quarter wise in current financial year and in SE having access to edit and set targets.

- **Influence:** Software GM that we earn as a fee on a specific transaction. In these situations, a different company (the vendor or a competitor) has sold the software directly to the client, and we are earning a fee for our role in identifying, progressing or closing the sale.

- **New Resell:** Software GM that is generated by Prolifics reselling new software transactions (on premise or SaaS).
- **Recurring:** Software GM that is predictable - specifically renewals (on premise or SaaS).

Notes:

- When you click on notes pop up will open in that sales executive can give notes and can save that will reflect in all software screens.

Calls/View:

- **Action:** when you selected **Calls** in Action field based on sales executive Calls will show.
- **Sales Executive:** In Sales Executive filter there are three types.
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 - Active SE: if you select Active SE, It shows Active sales executive data.
 - Select SE: In select SE, you can select one or multiple sales executive.
- **Vendor:** in Vendor filter there is vendors, Every Software having one vendor based on that software calls will show
- **Owner Division:** Sales Executive will tag to division, when search with sales executive data will get based on owner division.
- **Financial Year:** In default current financial year is selected and also can select past and future years to get data.

NOTE: In Vendor, we have to always uncheck Jam/Panther Prolifics

Summary table is cumulated at Quarter level, can further be sliced to SE level. It presents summarized view of **Targets, Software total amount, Calls, Upside, Gap and Closed amount**

Refresh Sf Data

Selected SE : << Active SE >>

| Quarter | Sales Executive | Target (\$) | Amount (\$) | Calls (\$) | Upside (\$) | Gap (\$) | Closed Amt (\$) |
|-----------|--------------------------|-------------|-------------|------------|-------------|-----------|-----------------|
| ▼ Summary | | 4,437,473 | 9,808,187 | 4,442,575 | 5,643,180 | 5,648,282 | 986,213 |
| ▼ 2022-Q3 | | 3,713,157 | 5,511,345 | 3,073,645 | 4,152,024 | 3,512,512 | 797,967 |
| | Brandon Barry | 575,000 | 1,099,044 | 678,294 | 2,411,000 | 2,514,294 | 88,338 |
| | Brian Nelson Webb | 282,000 | 135,815 | 20,288 | 132,000 | -129,712 | |
| | Chris Medley | 63,842 | 26,534 | 17,979 | 23,785 | -22,078 | 2,749 |
| | Darryl Zack | 155,000 | 214,016 | 168,516 | 47,000 | 60,516 | 115,145 |
| | Debbie Marcet | 55,000 | 430,833 | 80,255 | 247,924 | 273,179 | 3,865 |
| | Faiz Ahmad | 0 | 3,447 | 0 | 265 | 265 | |
| | Gunjan Goel | 0 | 80,000 | 0 | 10,000 | 10,000 | |
| | Heather Marie Richard... | 0 | 78,717 | 10,865 | 0 | 10,865 | 5,665 |
| | James Mangus | 150,000 | 3,268 | 3,268 | 0 | -146,732 | 3,268 |
| | Jason Sabotka | 0 | 2,253 | 2,253 | 0 | 2,253 | 1,503 |
| | Jeanette Wareham | 180,000 | 295,880 | 110,880 | 266,000 | 196,880 | 470 |
| | Jennifer Okey | 0 | 132,105 | 112,105 | 20,000 | 132,105 | 112,105 |
| | Jonathan Sharland | 116,213 | 68,392 | 26,179 | 37,876 | -52,158 | 26,179 |
| | Kirsten Craft | 215,000 | 288,843 | 238,843 | 50,000 | 73,843 | 59,593 |
| | Lakshmi Reddy Mula | 0 | 1 | 0 | 0 | 0 | |
| | Megan Paschen | 98,065 | 213,567 | 79,991 | 56,782 | 38,708 | 49,329 |
| | Neha Dhawale | 112,267 | 133,149 | 25,000 | 107,495 | 20,228 | |
| | Patrick Thyne | 317,000 | 519,524 | 429,524 | 90,000 | 202,524 | 8,376 |
| | Preeti Dua | 500,000 | 635,000 | 350,000 | 285,000 | 135,000 | |
| | Raghav Mathur | 22,310 | 7,806 | 7,806 | 100,000 | 85,496 | |
| | Srikanth Palusa | 0 | 25,000 | 0 | 25,000 | 25,000 | |
| | Stephen Cox | 111,460 | 320,337 | 116,617 | 203,720 | 208,877 | 116,617 |
| | Steven Aiello | 360,000 | 682,452 | 517,797 | 0 | 157,797 | 202,580 |
| | Steven Livingstone | 400,000 | 100,000 | 75,000 | 25,000 | -300,000 | |
| | Tim Pellegrino | 0 | 15,362 | 2,185 | 13,177 | 15,362 | 2,185 |
| ▶ 2022-Q4 | | 724,316 | 2,139,251 | 460,145 | 975,360 | 711,189 | 31,910 |
| ▶ 2023-Q1 | | 0 | 4,447,882 | 446,734 | 545,706 | 932,547 | 46,244 |

Calls of Selected Executives for 2022-Q3:

- When user click on Sales Executive user able to view detailed Opportunity's Add to Call.

Quarter : 2022-Q3 Sales Executive : << ALL >> Vendor : AllSight, AWS, C Owner Division : << ALL >>

Search

Calls of Selected Executives for 2022-Q3

These opportunities can be deleted

| Sales Executive / Customer / Prospect | Opportunity Add To Call | Vendor | Prob % | Close Date | Amount (\$) | Call (\$) | Upside (\$) | Closed Amt (\$) | Week Updated |
|---------------------------------------|---|------------|--------|------------|-------------|-----------|-------------|-----------------|---------------|
| ▼ Summary | | | | | 5,511,345 | 3,073,645 | 4,152,024 | 797,967 | |
| ▶ Brandon Barry | | | | | 1,099,044 | 678,294 | 2,411,000 | 88,338 | |
| ● Citco Fund Services (USA), ... | | | | | 286,778 | 241,778 | 45,000 | | |
| | ● Citco Fund Services - Box BAU Qty 1,000 RENEWAL 2021 | IBM - SI | 50 % | 31-Dec-21 | 286,778 | 74,891 | 0 | | 19-Apr-21 |
| | ● Citco Fund Services - Guardium FAM (File Activity Monitoring) CVR | IBM - SI | 10 % | 31-Dec-21 | 25,000 | 0 | 25,000 | | 16-Dec-19 |
| | ● Citco Fund Services - Guardium Insights SW Resell | IBM - SI | 10 % | 31-Dec-21 | 10,000 | 0 | 10,000 | | 22-Nov-21 |
| | ● Citco Fund Services - QRadar Advisor with Watson SW Resell 2/... | IBM - SI | 50 % | 31-Dec-21 | 21,272 | 21,272 | 0 | | not happening |
| | ● Citco Fund Services - TM1 and SPSS Software Resell | IBM - IM&A | 10 % | 31-Dec-21 | 10,000 | 0 | 10,000 | | 22-Nov-21 |
| | ● Citco Fund Services 7206735 Resilient Terminate RHWL 12302021 | IBM - SI | 50 % | 30-Dec-21 | 4,892 | 4,892 | 0 | | 19-Apr-21 |
| | ● Citco Fund Services 7206735 RHWL Dec 2021 April 2022 | IBM - SI | 50 % | 30-Dec-21 | 78,951 | 78,951 | 0 | | 19-Apr-21 |
| | ● Citco Fund Services 7206735 Qradar AutoRHWL 77377188 2022 | IBM - SI | 50 % | 30-Dec-21 | 61,772 | 61,772 | 0 | | 19-Apr-21 |
| ● CoLinux | | | | | 5,200 | 5,200 | 0 | | |
| | ● CoLinux - MQ on Cloud | IBM - IM&A | 25 % | 31-Dec-21 | 5,200 | 5,200 | 0 | | 22-Nov-21 |
| ● Hat Media Services LLC. | | | | | 10,000 | 0 | 10,000 | | |
| | ● Hat Media - Aspera | IBM - IM&A | 10 % | 31-Dec-21 | 10,000 | 0 | 10,000 | | 22-Nov-21 |

Wow (Week of Week):

- **Action:** when you selected **Wow** in Action field based on sales executive Calls will show.
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