Contents

Salesforce Opportunities

This section guides a user through viewing an opportunity, understanding the best ways to search the opportunities and how to open documents for a specific opportunity that is in or has gone through the Prolifics Salesforce lifecycle.

Viewing these opportunities and the documents inside of PPM from Salesforce will be incorporated into many of our internal processes for all departments.

1. Data Table
1a. sf Pipeline

Sf Pipeline											
● Customer ● Prospect	Account Executive	Opportunity Name		Type	Stage	Primary Compete...	Practice	Amount ($)	Prob	Projected Clo...	Next Step
Summary								22,283,374			
● Smithfield Foods	Brandon Barry	Smithfield - APIc and Boomi Monitoring Service... ⓘ		Services	SOW Pro...	Digital Integration	DACS	43,880	60%	11-Apr-22	1/25: Dep
● Reverse Logistics Gr...	Chris Medley	RLG - IRIS Analysis Phase 1	ⓘ	Services	Condition...	<< Unassigned >>	<< Others ...	178,789	75%	28-Apr-22	06/12 - SC
● Bluechip	Chris Medley	Bluechip - CPA Global Custom App Migration	ⓘ	Services	Condition...	<< Unassigned >>	<< Others ...	295,313	75%	30-Jun-22	04/04 - Jul
● Bluechip	Chris Medley	Bluechip - SIS MQ assistance	ⓘ	Services	Draft Prop...	<< Unassigned >>	<< Others ...	72,900	50%	28-Apr-22	04/04 - In
● Insolvency Service	Chris Medley	IBM@Insolvency additional hours CR001	ⓘ	Services	Condition...	<< Unassigned >>	<< Others ...	21,600	75%	28-Apr-22	28/03 - SC
● Insolvency Service	Chris Medley	IBM@Insolvency additional hours CR002	ⓘ	Services	Condition...	<< Unassigned >>	<< Others ...	3,500	75%	28-Apr-22	28/03 - SC
● Insolvency Service	Chris Medley	IBM@Insolvency additional hours CR003	ⓘ	Services	Condition...	<< Unassigned >>	<< Others ...	9,720	75%	28-Apr-22	28/03 - SC

Customer: The Opportunity from the company we are looking were already a customer of Prolifics shown in Green Colour

Prospect: These are new Customers who are not yet worked with Prolifics will be shown in Blue colour in the column

Account Executive: For Each project one executive is tagged and that executive becomes Account Executive for that project.

Opportunity Name: This the Name of the Opportunity that we are looking for and by clicking on the D symbol we can get the complete view of the Opportunities and the Documents available for that Opportunity in the tables below.

Type: Here we can see whether it is a Service type project or Software/ Hardware Project.

Stage: From Starting of Project to Receiving of the Project there are different stages that opportunity go through that stage of the Project will be shown over here.

Primary Competency: Here for the opportunity, we are looking at to which competency that Opportunity belongs too will be displayed.

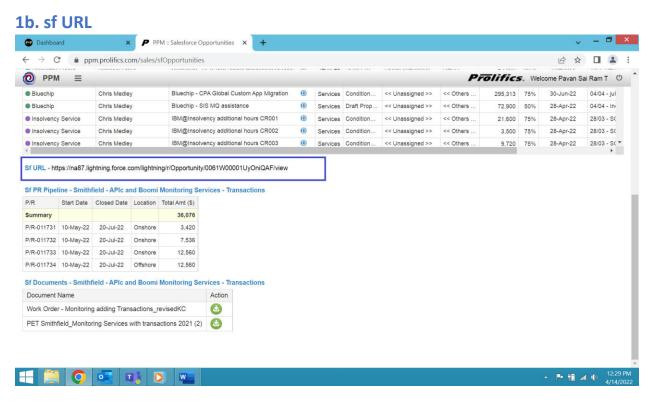**Practice:** To which practice this Opportunity belongs too.

Amount ($): The value of the Opportunity we are looking at will be displayed here.

Prob: This value shows the probability of receiving the opportunity.

Projected Closed Date: The Estimated date by when the opportunity is closed.

Next Step: The work to be done in continuation will be displayed here.

Country: The country name from where we are looking at the Opportunity.

1b. sf URL

The Highlighted field in the above image is the Salesforce URL Link for the Opportunity Selected.

1c. sf PR Pipeline

Sf PR Pipeline - Smithfield - APIc and Boomi Monitoring Services - Transactions

P/R	Start Date	Closed Date	Location	Total Amt ($)
Summary				**36,076**
P/R-011731	10-May-22	20-Jul-22	Onshore	3,420
P/R-011732	10-May-22	20-Jul-22	Onshore	7,536
P/R-011733	10-May-22	20-Jul-22	Onshore	12,560
P/R-011734	10-May-22	20-Jul-22	Offshore	12,560

This table shows the resource requirement and their time period and Location along with the amount paid.

Can also see the details amount paid for that resource monthly too.

Sf PR Pipeline - Smithfield - APIc and Boomi Monitoring Services - Transactions

P/R	Start Date	Closed Date	Location	Total Amt ($)	2023_Q1	Apr-2022($)	May-2022($)	Jun-2022($)	Total
Summary				**36,076**	**26,364**	**0**	**11,101**	**15,263**	**26,364**
P/R-011731	10-May-22	20-Jul-22	Onshore	3,420	2,499	0	1,052	1,447	2,499
P/R-011732	10-May-22	20-Jul-22	Onshore	7,536	5,507	0	2,319	3,188	5,507
P/R-011733	10-May-22	20-Jul-22	Onshore	12,560	9,179	0	3,865	5,314	9,179
P/R-011734	10-May-22	20-Jul-22	Offshore	12,560	9,179	0	3,865	5,314	9,179

1d. sf Documents

Sf Documents - Smithfield - APIc and Boomi Monitoring Services - Transactions
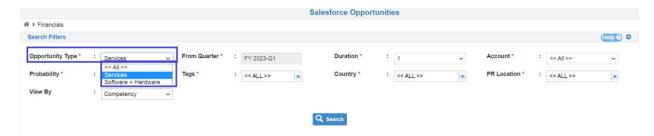
Document Name	Action
Work Order - Monitoring adding Transactions_revisedKC	⬇
PET Smithfield_Monitoring Services with transactions 2021 (2)	⬇

This table shows the documents available for that opportunity with their name and will show the Download button in actions for download of the document.
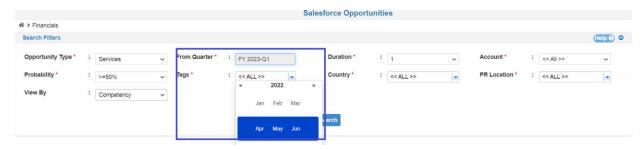
2. Filters

2a. Opportunity Type

Here we can choose which type of opportunity you are looking for 'Services' or is it 'Software / Hardware'.
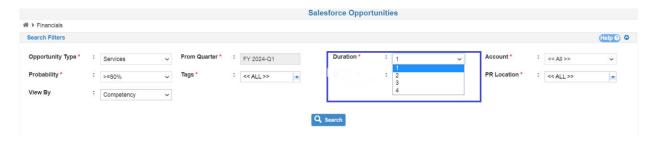
2b. From Quarter

Here we can choose which quarter the opportunity you are searching for is believed to be in. You will have a calendar to pick the three-month range from identifying the quarter

2c. Duration

Here we can select the duration after the Quarter selected and have options up to 4 Months.
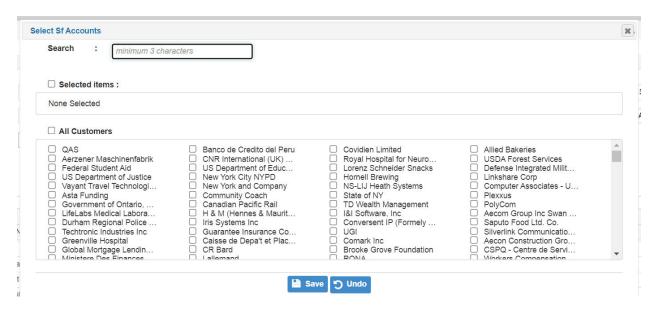

2d. Account

This filter is utilized to search <<All>> opportunities or use <<Select>> to search for a specific account name.
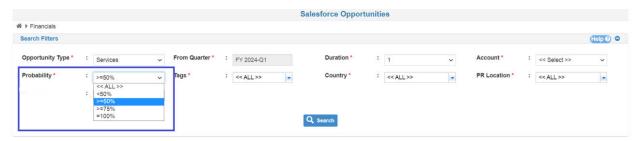
When you <<Select>> to search for a specific name it will bring up an additional search box where we can select single or Multiple accounts or can search for the accounts.
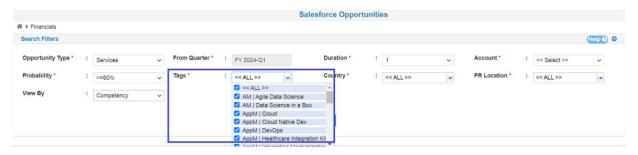

2e. Probability

The Salesforce record has a field that shows this percentage of probability, this allows the user to search for specific stages of an opportunity.
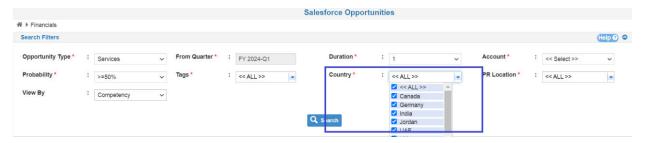

2f. Tags

The Tags within an opportunity in Salesforce are used to "TAG" it with specific items for future tracking, and to track different work efforts performed on the specific engagements.
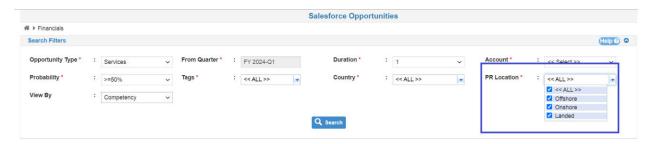
2g. Country

Country allows you to narrow down the search to a specific area that the opportunity is located in.

2h. PR Location

PR Location stands for 'Practice Resource' Location. NOW known as 'Competency Location' – This field Identifies where the requested resource will need to be from.

2i. View By

This provides different views in which data can be viewed, based on the view selected the table displays the data.