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## 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 - S	
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 - S	
Insolvency Service	Chris Medley	IBM@Insolvency additional hours CR002	Services	Condition...	<< Unassigned >>	<< Others ...	3,500	75%	28-Apr-22	28/03 - S	
Insolvency Service	Chris Medley	IBM@Insolvency additional hours CR003	Services	Condition...	<< Unassigned >>	<< Others ...	9,720	75%	28-Apr-22	28/03 - S	

**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 screenshot shows a web browser window with the URL `ppm.prolifics.com/sales/sfOpportunities`. The page displays a table of opportunities with columns for status, owner, title, practice, next step, probability, amount, and dates. The first row is highlighted. Below the table, a box highlights the 'SF URL' field with the value `https://na87.lightning.force.com/lightning/r/Opportunity/0061W00001UyOniQAF/view`. Below this, there are two sections: 'SF PR Pipeline - Smithfield - APic and Boomi Monitoring Services - Transactions' and 'SF Documents - 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

Document Name	Action
Work Order - Monitoring adding Transactions_revisedKC	
PET Smithfield_Monitoring Services with transactions 2021 (2)	

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 (\$)
<b>Summary</b>				<b>36,076</b>
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
<b>Summary</b>				<b>36,076</b>	<b>26,364</b>	<b>0</b>	<b>11,101</b>	<b>15,263</b>	<b>26,364</b>
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'.

**Salesforce Opportunities**

Financials

**Search Filters** Help

Opportunity Type *	: Services	From Quarter *	: FY 2023-Q1	Duration *	: 1	Account *	: << All >>
Probability *	: << All >>	Tags *	: << ALL >>	Country *	: << ALL >>	PR Location *	: << ALL >>
View By	: Competency						

Search

## 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

**Salesforce Opportunities**

Financials

**Search Filters** Help

Opportunity Type *	: Services	From Quarter *	: FY 2023-Q1	Duration *	: 1	Account *	: << All >>
Probability *	: >=50%	Tags *	: << ALL >>	Country *	: << ALL >>	PR Location *	: << ALL >>
View By	: Competency						

Search

## 2c. Duration

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

**Salesforce Opportunities**

Financials

**Search Filters** Help

Opportunity Type *	: Services	From Quarter *	: FY 2024-Q1	Duration *	: 1	Account *	: << All >>
Probability *	: >=50%	Tags *	: << ALL >>	Country *	: << ALL >>	PR Location *	: << ALL >>
View By	: Competency						

Search

## 2d. Account

This filter is utilized to search <<All>> opportunities or use <<Select>> to search for a specific account name.

**Salesforce Opportunities**

Financials

**Search Filters** Help

Opportunity Type *	: Services	From Quarter *	: FY 2024-Q1	Duration *	: 1	Account *	: << All >>
Probability *	: >=50%	Tags *	: << ALL >>	Country *	: << ALL >>	PR Location *	: << ALL >>
View By	: Competency						

Search

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.

Select Sf Accounts

Search :

☐ Selected items :  
None Selected

☐ All Customers

<input type="checkbox"/> QAS	<input type="checkbox"/> Banco de Credito del Peru	<input type="checkbox"/> Covidien Limited	<input type="checkbox"/> Allied Bakeries
<input type="checkbox"/> Aerzener Maschinenfabrik	<input type="checkbox"/> CNR International (UK) ...	<input type="checkbox"/> Royal Hospital for Neuro...	<input type="checkbox"/> USDA Forest Services
<input type="checkbox"/> Federal Student Aid	<input type="checkbox"/> US Department of Educ...	<input type="checkbox"/> Lorenz Schneider Snacks	<input type="checkbox"/> Defense Integrated Milit...
<input type="checkbox"/> US Department of Justice	<input type="checkbox"/> New York City NYPD	<input type="checkbox"/> Hornell Brewing	<input type="checkbox"/> Linkshare Corp
<input type="checkbox"/> Vayant Travel Technologi...	<input type="checkbox"/> New York and Company	<input type="checkbox"/> NS-LIJ Heath Systems	<input type="checkbox"/> Computer Associates - U...
<input type="checkbox"/> Asta Funding	<input type="checkbox"/> Community Coach	<input type="checkbox"/> State of NY	<input type="checkbox"/> Plexus
<input type="checkbox"/> Government of Ontario, ...	<input type="checkbox"/> Canadian Pacific Rail	<input type="checkbox"/> TD Wealth Management	<input type="checkbox"/> PolyCom
<input type="checkbox"/> LifeLabs Medical Labora...	<input type="checkbox"/> H & M (Hennes & Mauri...	<input type="checkbox"/> I&I Software, Inc	<input type="checkbox"/> Aecom Group Inc Swan ...
<input type="checkbox"/> Durham Regional Police ...	<input type="checkbox"/> Iris Systems Inc	<input type="checkbox"/> Conversent IP (Formerly ...	<input type="checkbox"/> Saputo Food Ltd. Co.
<input type="checkbox"/> Technonic Industries Inc	<input type="checkbox"/> Guarantee Insurance Co...	<input type="checkbox"/> UGI	<input type="checkbox"/> Silverlink Communicatio...
<input type="checkbox"/> Greenville Hospital	<input type="checkbox"/> Caisse de Depa't et Plac...	<input type="checkbox"/> Comark Inc	<input type="checkbox"/> Aecon Construction Gro...
<input type="checkbox"/> Global Mortgage Lendin...	<input type="checkbox"/> CR Bard	<input type="checkbox"/> Brooke Grove Foundation	<input type="checkbox"/> CSPQ - Centre de Servi...
<input type="checkbox"/> Ministere Des Finances	<input type="checkbox"/> Lallemand	<input type="checkbox"/> BONA	<input type="checkbox"/> Workers Compensation

## 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.

Salesforce Opportunities

Search Filters

Opportunity Type \* : Services

From Quarter \* : FY 2024-Q1

Duration \* : 1

Account \* : << Select >>

Probability \* :   
>=50%  
<< ALL >>  
<50%  
>=50%  
>=75%  
=100%

Tags \* : << ALL >>

Country \* : << ALL >>

PR Location \* : << ALL >>

## 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.

Salesforce Opportunities

Search Filters

Opportunity Type \* : Services

From Quarter \* : FY 2024-Q1

Duration \* : 1

Account \* : << Select >>

Probability \* : >=50%

View By : Competency

Tags \* :   
<< ALL >>  
AM | Agile Data Science  
AM | Data Science in a Box  
AppM | Cloud  
AppM | Cloud Native Dev  
AppM | DevOps  
AppM | Healthcare Integration Kil

Country \* : << ALL >>

PR Location \* : << ALL >>

## 2g. Country

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

The screenshot shows the 'Salesforce Opportunities' search filters. The 'Country' dropdown menu is open, displaying a list of countries with checkboxes: << ALL >>, Canada, Germany, India, Jordan, and UAE. The 'Search' button is visible below the dropdown.

## 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.

The screenshot shows the 'Salesforce Opportunities' search filters. The 'PR Location' dropdown menu is open, displaying a list of locations with checkboxes: << ALL >>, Offshore, Onshore, and Landed. The 'Search' button is visible below the dropdown.

## 2i. View By

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

The screenshot shows the 'Salesforce Opportunities' search filters. The 'View By' dropdown menu is open, displaying a list of views with checkboxes: Competency, Executive, Opportunity, and Customer. The 'Search' button is visible below the dropdown.