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Open Customer

Here we can see the complete details of the Customer and those related documents.

1. Dashboard

Here we can see all the data that is entered while creating the Customer can be displayed

Dashboard	Edit	Documents	Engagement	Projects	Financials	Account Plan	Technology	QBR	Risks	Initiatives	Relationship Heatmap
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Overview

Customers > Open > Overview

Customer Name	:	Prolifics	Project Category	:	NA	Industry type	:	Computer Services
Phone	:	NA	Website	:	NA	Customer Status	:	Active
Sales Territory	:	India	Sales Executive	:	Rajeshwar Rao Akinapelli	Client Partner	:	-
Engagement Partner	:	-	Country	:	-	Customer Email	:	-
Classification	:	-	SF Account Link	:	http://	CSL Head	:	-
CSL	:	-	Associate CSL	:	-	Delivery Partner Head	:	-
Delivery Partner	:	-	Competency Lead	:	-			

Invoicing Details

Invoice For	:	NA	Invoice Cycle	:	NA	Payment Terms	:	NA
Invoice Time	:	NA	Expense Billable	:	No	Discount (%)	:	NA
Customer Currency	:	NA	Invoice Culture	:	NA	Invoice Template	:	NA

Divisions

Name	Address Line	Country	State/Province	City	ZIP/Postal Code	Contact Number
XXX-PROLIFICS Division		NM	Others	Others		UNKNOWN
XXX-PROLIFICS Division		NM	Others	Others		
XXX-PROLIFICS Division		NM	Others	Others		
XXX-PROLIFICS Division		NM	Others	Others		UNKNOWN
XXX-PROLIFICS Division		NM	Others	Others		UNKNOWN
XXX-PROLIFICS Division		NM	Others	Others		UNKNOWN

2. Edit

Here we can edit the details related to customers and Invoices and can also add new stake holders in the customer

Dashboard
Edit
Documents
Engagement
Projects
Financials
Account Plan
Technology
QBR
Risks
Initiatives
Relationship Heatmap

Edit

Customers
Open
Details

Customer Name *

Profilics

Size

\$1M - \$100M

Sales Executive *

Rajeshwar Rao Akinapelli

CSL

press space for resource list

Competency Lead

press space for resource list

Fax Number

Is this customer referenceable?

<< Please Select >>

Sales Territory *

India

Client Partner

Associate CSL

press space for resource list

Country

<< Please Select >>

SF Account Link

http://

Customer Status *

Active

Industry type *

Computer Services

Engagement Partner

Delivery Partner Head

press space for resource list

Classification

<< Please Select >>

Website

Project Category *

<< Please Select >>

CSL Head

press space for resource list

Delivery Partner

press space for resource list

Phone

Customer Email

Invoicing Details

Create Invoice For

<< Please Select >>

Discount (%)

Invoice Cycle

<< Please Select >>

Currency

<< Please Select >>

Payment Terms

<< Please Select >>

Invoice Culture

<< Please Select >>

Invoice Time

<< Please Select >>

Invoice Template

<< Please Select >>

Expense Billable

YES ☐ NO ☐

3. Documents

Here we can see all the documents related to the customer and can also add the documents related to the vendor and can search for the particular document by name of the document

Dashboard
Edit
Documents
Engagement
Projects
Financials
Account Plan
Technology
QBR
Risks
Initiatives
Relationship Heatmap

Boyd Gaming Corporation (BOYDGAMING01)

Customer Documents - BOYDGAMING01

Customers

Document Folders

Boyd Gaming Corporation

Search Filters

Note: Search will be applied for complete project documents...

Document Name
:

Document Repository

<input type="checkbox"/>	File Name	File Size	Version	File Type	Created On	Created By	Updated On	Updated By	Action
No records found									

4. Engagement

Here we can see all the engagements linked with that particular customer will be displayed in an data table with the details of the manager and status related to that engagement and can also add new engagements in that screen by clicking on the New Engangement.

 New Engagement

Dashboard
Edit
Documents
Engagement
Projects
Financials
Account Plan
Technology
QBR
Risks
Initiatives
Relationship Heatmap

Customer Gross Margin Analysis

Customers

Search Filters

Start Month * : Nov-2021
Duration * : 6
Search

		Nov-2021	Dec-2021	Jan-2022	Feb-2022	Mar-2022	Apr-2022	Total
Boyd Gaming Corporation (5)	Gross Margin %	62.41%	43.19%	43.4%	-40.38%	1711.3%	57.77%	70.53%
Vendor		Nov-2021	Dec-2021	Jan-2022	Feb-2022	Mar-2022	Apr-2022	Total
IBM - IM&A	Closed Amount	-	-	4680	-	-	-	4680

7. Account Plan

Here we can view the Account plan in different types such as planned revenue for the customer and actual revenue of the customer and can also compare both the planned and actual revenue by selecting the particular financial year can be selected.

Planning revenue data for that customer

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Account Plan

🏠

Customers

Search Filters

🔍

View Type

Planning

FY

FY 2023

🔍 Search

Notes

Type	2023-Q1	2023-Q2	2023-Q3	2023-Q4
Revenue	0	0	0	0
GM %	0 %	0 %	0 %	0 %
Service Offerings				
Practices				
Customer Units				

Actual revenue of the customer

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Account Plan

🏠

Customers

Search Filters

View Type

Actuals

Quarter

FY 2023-Q1

🔍 Search

Notes

Type	2022-Q3	2022-Q4	2023-Q1	2023-Q2
Revenue	178,068	87,054	152,517	154,848
GM %	50 %	20 %	58 %	58 %
Service Offerings				
Practices				
Customer Units				

Comparing both the Actual and Planned revenue of the customer.

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Account Plan

🏠

Customers

Search Filters

View Type

Compare

Quarter

FY 2023-Q1

Search

Notes

Type	2023-Q1		2023-Q2		2023-Q3		2023-Q4	
	Planned	Actual	Planned	Actual	Planned	Actual	Planned	Actual
Revenue	0	152,517	0	154,848	0	148,024	0	153,848
GM %	0 %	58 %	0 %	58 %	0 %	58 %	0 %	58 %
Service Offerings								
Practices								
Customer Units								

8. Technology

Here we can see the list of technologies used in the Projects related to customer in the data table.

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Technology

Customers

Add

S.No	System or Function	Software	Platform	Service Vendor	Future Plans	Competitor Notes	Action
No Records To View							

We can also add the new technologies that can be used for future by clicking on add button new window populates where in all the data needs to be added.

Dashboard	Edit	Documents	Engagement	Projects	Financials	Account Plan	Technology	QBR	Risks	Initiatives	Relationship Heatmap						
Boyd Gaming Corporation						Technology											
Customers																	
Add Technology																	
S.No	System or Function	Software	Platform	Service Vendor	Future Plans	Competitor Notes	Action										

Software or Function *

Max 50 characters

Software *

Max 50 characters

Platform

Max 50 characters

Service Vendor

Max 50 characters

Future Plans

Competitor Notes

Save

9. QBR

Here we can see the list of QBR held in the Projects related to customer in the data table.

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

QBR

Customers

Add QBR

S.No	QBR Date	Lead Presenter	Prolifics Participants	Customer Participants	Presentation Date	Meeting Notes & Next Steps	Presentation File	Action
No Records To View								

We can also add the upcoming QBR details or already completed QBR Details and can also add the documents used in that meeting can be added for further use.

Dashboard	Edit	Documents	Engagement	Projects	Financials	Account Plan	Technology	QBR	Risks	Initiatives	Relationship Heatmap
Boyd Gaming Corporation				QBR							
Customers											
Add QBR											
S.No	QBR Date	Lead Presenter	Prolifics Parti								
				QBR Date *	:						
				Lead Presenter *	:	Type minimum 3 characters					
				Prolifics Participants	:	Enter Resource Name					
				Customer Participant	:	Type minimum 3 characters					
				Presentation Date	:						
				Upload Documents	:	Choose File No file chosen Supported types jpg, jpeg, xlsx, docx, txt, pdf					
				Meeting Notes & Next Steps	:						
				Save							

We can also add the new technologies that can be used for future by clicking on add button new window populates where in all the data needs to be added.

10.Risks

Here we can find all the risks that are either identified or happened in the projects related to that customer can be displayed in the data table.

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Risks

Customers

Show

10

entries

Search:

S.No	Project Name / Project Code	Risk Name	Risk Type	Risk Source	Risk Impact	Probability of Occurrence	Risk Value	Assigned To	Risk Occurred	Risk Status	Occurred Date	Mitigation Date	Created By
1	(P) Boyd Gaming Boyd Manag...	Inability to support ColdFusion	Resource	Operations	4-High	5-Very High	20		No	Identified			Debasish Behera

Previous

1

Next

Showing 1 to 1 of 1 entries

11.Initiatives

If any initiatives has already taken regarding the customer can be found here

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Initiatives

🔍

Customers

➕ Add

S.No	Initiatives	Function Area	Current Status	Innovative Technology	Customer Stakeholders	Primary Objective	Description	Action
No Records To View								

Here can also add the new initiatives by clicking on add button and new window populates to add the details.

Add Initiative

Initiative *

Max 50 characters

Function Area *

Max 50 characters

Current Status *

Max 50 characters

Innovative Technology *

Max 50 characters

Customer Stakeholder *

Max 50 characters

Primary Objective

Description

Save

12. Relationship Heatmap

Here we can find how is the relationship between the particular customer and our organization can be added here which will be used for further use.

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Relationship Heatmap

Customers

Negative

Neutral

Advocate

Champion

Here by clicking on the add button can add the relation status between the customer and the organization.

Relationship Heatman

Add Relationship Heatmap

Name *

Max 50 characters

Title

Max 50 characters

Department *

Max 50 characters

Priority *

<< Please Select >>

Relationship Strength *

<< Please Select >>

Engagement Level *

<< Please Select >>

Role Description

FY Mandate

Save

Dashboard

Edit

Documents

Engagement

Projects

Financials

Account Plan

Technology

QBR

Risks

Initiatives

Relationship Heatmap

Boyd Gaming Corporation

Relationship Heatmap

Customers

Negative

Neutral

Advocate

Champion

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