

Services:

The screenshot displays the 'Services' dashboard. At the top, there's a breadcrumb 'Financials > Sales'. Below it is a 'Search Filters' section with dropdowns for 'Action' (set to 'Targets'), 'Sales Executive' (set to '<< Active SE >>'), 'Summary' (set to '<< None >>'), 'From Quarter' (set to 'FY 2022-Q3'), 'Practice' (set to '<< ALL >>'), 'Duration' (set to '4'), and 'Country' (set to '<< ALL >>'). A 'Search' button is present. Below the filters are buttons for 'Show Sf Pipeline' and 'Refresh Sf Data'. The main section is titled 'Targets' and shows 'Selected SE : << Active SE >>'. It contains a table with columns for Sales Executive / Practice, 2022_Q3, 2022_Q4, 2023_Q1, 2023_Q2, and Total (\$).

Sales Executive / Practice	2022_Q3	2022_Q4	2023_Q1	2023_Q2	Total (\$)
Summary	16,842,399	17,903,330	0	0	34,745,729
Ajay Malgaonkar	162,402	169,164	0	0	331,566
Amit Mehta	0	0	0	0	0
Anant Gupta	0	0	0	0	0
Bala Siddeswar Peddi	0	0	0	0	0
Brandon Barry	1,456,820	1,798,557	0	0	3,255,377
Brian Nelson Webb	286,667	307,777	0	0	594,444
Carolyn Young	0	0	0	0	0
Charles Hemenway	0	0	0	0	0
Chris Medley	533,328	555,564	0	0	1,088,892
Darryl Zack	1,199,994	1,249,998	0	0	2,449,992

Filters:

Targets:

- **Action:** when you selected **Targets** in Action field based on sales executive Services targets will show.
- **From Quarter:** In default current quarter is selected and also can select past and future quarters to get data.
- **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
- **Practice:** In Practice filter field user can able to select one practice or multiple practices.
- **Country:** In Country filter field user can able to select one country or multiple country.
- **Summary:** in Summary based on country will get service targets.

Selected SE : << Active SE >>

Summary (Oct-21 to Sep-22)

Country / Practice	2022_Q3	2022_Q4	2023_Q1	2023_Q2	Total (\$)
▶ Canada	1,376,457	1,433,802	0	0	2,810,259
▶ Germany	328,800	342,500	0	0	671,300
▶ India	5,641,997	5,877,068	0	0	11,519,065
▶ Jordan	0	0	0	0	0
▶ UAE	0	0	0	0	0
▶ UK	1,875,155	1,953,308	0	0	3,828,463
▶ US	7,619,990	8,296,652	0	0	15,916,642
Total	16,842,399	17,903,330	0	0	34,745,729

In below Targets table based on Sales executive we get targets data and is editable for who is having sales read and writable access they can edit and save targets.

Show Sf Pipeline

Refresh Sf Data

Targets

Selected SE : << Active SE >>

Sales Executive / Practice	2022_Q3	2022_Q4	2023_Q1	2023_Q2	Total (\$)
▶ Summary	16,842,399	17,903,330	0	0	34,745,729
▶ Ajay Malgaonkar	162,402	169,164	0	0	331,566
▶ Amit Mehta	0	0	0	0	0
▶ Anant Gupta	0	0	0	0	0
▶ Bala Siddeswar Peddi	0	0	0	0	0
▶ Brandon Barry	1,456,620	1,798,557	0	0	3,255,177
▶ Brian Nelson Webb	266,667	307,777	0	0	574,444
▶ Carolyn Young	0	0	0	0	0
▶ Charles Hemenway	0	0	0	0	0
▶ Chris Medley	533,328	555,564	0	0	1,088,892
▶ Darryl Zack	1,199,994	1,249,998	0	0	2,449,992
▶ Debbie Marcet	453,333	472,224	0	0	925,557
▶ Deepak Goel	834,648	869,424	0	0	1,704,072
▶ Dennis Lee Martin	0	0	0	0	0
▶ Derrick Pereira	0	0	0	0	0
▶ Elaine Lau	0	0	0	0	0
▶ Erika Finck	0	0	0	0	0
▶ Faiz Ahmad	0	0	0	0	0

Save

Reset

If any data added in Sales force, that should sync to ppm services click on **Refresh SF Data**

Signings Targets:

- **Action:** when you selected **Signings Targets** in Action field based on sales executive Services targets will show.
- **Financial Year:** In default current financial year is selected and also can select past and feature Years to get data.
- **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

Sales Executive	2022_Q1	2022_Q2	2022_Q3	2022_Q4	Total(\$)
Kiran Surapaneni	0	0	0	0	0
Kirsten Craft	484,864	538,268	587,209	611,668	2,202,000
Kris Brown	0	0	0	0	0
Lakshmi Reddy Mula	0	0	0	0	0
Megan Paschen	0	0	0	0	0
Michael Gonzales	0	0	0	0	0
Michael Murphy	0	0	0	0	0
Michelle Shuler	0	0	0	0	0
Neha Dhewale	0	0	0	0	0
Patrick Thyne	316,667	366,667	400,000	416,666	1,500,000
Pavan Kumar Kakandki	0	0	0	0	0
Preeti Dua	0	0	0	0	0
Raghav Mathur	0	0	0	0	0
Rajeshwar Rao Akinapelli	0	0	0	0	0

In below Targets table based on Sales executive we get targets data and is editable for who is having sales read and writable access they can edit and save targets.

Customer Mapping:

- **Action:** when you selected **Customer Mapping** in Action field based on sales executive Customer Mappings and Services targets will show.
- **From Quarter:** In default current quarter is selected and also can select past and feature quarters to get data.
- **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
- **Practice:** In Practice filter field user can able to select one practice or multiple practices.
- **Country:** In Country filter field user can able to select one country or multiple country.
- **Customer:** In Customer field we can select Mapped (that shows customer mapped), Assigned (assigned customers data), select (user can able to select one or more customers).
- **Summary:** in Summary based on selection (country and customer) will get service targets.

Services

Financials > Sales

Search Filters Help ⓘ 📄 🔍

Action :	Customer Mapping ▾	From Quarter* :	FY 2022-Q3	Duration :	4 ▾
Sales Executive* :	<< All SE >> ▾	Practice* :	<< ALL >> ▾	Country* :	<< ALL >> ▾
Customer* :	Assigned ▾	Summary :	<< None >> ▾		

Search

Show Sf Pipeline **Refresh Sf Data** 🔍

Selected SE : << All SE >>

Practice / Country	2022_Q3		2022_Q4		2023_Q1		2023_Q2		Total	
	Cust Map (\$)	Target (\$)	Cust Map (\$)	Target (\$)	Cust Map (\$)	Target (\$)	Cust Map (\$)	Target (\$)	Cust Map (\$)	Target (\$)
no Data Found										

View:

- **Action:** when you selected **View** in Action field based on sales executive Targets, Customer mapping, Calls, SF Revenue, PL Rev, Rec Rev and Attainment% will show.
- **From Quarter:** In default current quarter is selected and also can select past and future quarters to get data.
- **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
- **Practice:** In Practice filter field user can able to select one practice or multiple practices.
- **Country:** In Country filter field user can able to select one country or multiple country.

- **Summary:** in Summary based on selection (Executive, Practice, country and customer) will get Targets, Customer mapping, Calls, SF Revenue, PL Rev, Rec Rev and Attainment%.
- **Measures:** In measures field user can able to select Targets, Customer mapping, Calls, SF Revenue, PL Rev, Rec Rev and Attainment% to get data.

Services

Financials Sales

Search Filters

Help

ActionViewView ByQuarterFrom QuarterFY 2022-Q3

Duration4Sales ExecutiveAll SEPracticeAll

CountryAllSummaryExecutiveMeasuresAll

Search

Show SF PipelineRefresh SF Data

Selected SE : All SE

Sales Executive / Practice	2022_Q3								2022_Q4						
	Target (\$)	Cust Map (\$)	Call (\$)	Sf Rev (\$)	Planned Rev (\$)	Recognized Rev (\$)	Attain(%)		Target (\$)	Cust Map (\$)	Call (\$)	Sf Rev (\$)	Planned Rev (\$)	Recognized Rev (\$)	Attain(%)
Summary	24,024,138	24,667,169	19,098	159,652	18,906,163	14,190,006	79	25,103,049	25,814,550	14,024,762	1,881,555	12,143,207	0		
<< Unassigned >>	0	0	1,121,387	0	1,128,379	822,139	0	0	0	1,049,681	0	1,049,681	0	0	
Ajay Malgaonkar	162,402	162,402	103,989	0	102,416	66,205	62	169,164	169,164	0	0	0	0	0	
Barry Walwyn	0	0	0	0	0	420	0	0	0	0	0	0	0	0	
Brandon Barry	1,456,620	1,589,954	886,475	0	878,101	672,152	62	1,798,557	1,937,445	633,769	0	633,769	0	0	
Brett Snyder	616,419	616,419	233,203	0	221,583	135,177	33	642,105	642,105	61,960	0	61,960	0	0	
Brian Nelson Webb	266,667	266,667	0	0	792	0	0	307,777	307,776	0	0	0	0	0	
Charles Hemenway	0	0	88,737	0	84,339	41,024	0	0	0	101,728	0	101,728	0	0	
Chris Medley	533,328	533,326	394,340	0	437,341	263,315	66	555,564	555,565	95,082	0	95,082	0	0	

When we search based on Sales Executive (Targets, Customer mapping, Calls, SF Revenue, PL Rev, Rec Rev and Attainment %) data will show.

- Data will show on Quarter wise and when user expand quarter data will show month wise.
- When user expand sales executive then data will show for Practice, Country and Customer or Prospect.

Show SF Pipeline Refresh SF Data														
Selected SE : << All SE >>														
Sales Executive / Practice	Country	Customer Prospect	2022_Q3							2022_Q4				
			Target (\$)	Cust Map (\$)	Call (\$)	SF Rev (\$)	Planned Rev (\$)	Recognized Rev (\$)	Attain(%)	Target (\$)	Cust Map (\$)	Call (\$)	SF	
Summary			24,024,138	24,667,169	19,098,853	159,652	18,906,163	14,190,006	79	25,103,049	25,814,550	14,024,762		
<< Unassigned >>			0	0	1,121,387	0	1,128,379	822,139	0	0	0	1,049,581		
Ajay Malgaonkar			162,402	162,402	103,989	0	102,416	66,205	62	169,164	169,164	0		
DACS	India		115,947	115,947	92,638	0	91,252	58,954	78	120,777	120,777	0		
		Capital Bank of Jordan			11,232	0	11,712	5,280	0			0		
		IBM Middle East FZ-LLC		75,402	81,406	0	79,540	53,674	0			78,543		
		Intellective		40,545	0	0	0	0	0			42,234		
IM&A	India		25,995	25,995	1,600	0	1,600	448	6	27,075	27,075	0		
		IBM Middle East FZ-LLC		10,539	1,600	0	1,600	448	0			10,977		
		Intellective		15,456	0	0	0	0	0			16,098		
QA&TA	India		20,460	20,460	9,751	0	9,564	6,803	46	21,312	21,312	0		
		ECS ME LLC		12,000	0	0	0	0	0			12,501		
		IBM Middle East FZ-LLC		8,460	9,751	0	9,564	6,803	0			8,811		
Barry Walwyn			0	0	0	0	0	420	0	0	0	0		
Brandon Barry			1,456,620	1,589,954	886,475	0	878,101	672,152	62	1,798,557	1,937,445	633,769		

- When user mouse hover on revenue it will open popup and in pop up revenue will show for individual project.

Sales Executive / Practice	Country	Customer Prospect	2022_Q3							Target (%)			
			Target (\$)	Cust Map (\$)	Call (\$)	Sf Rev (\$)	Planned Rev (\$)	Recognized Rev (\$)	Target (\$)		Cust Map (\$)	Call (\$)	\$
Summary			24,024,138	24,867,169	19,098,853	159,652	18,906,163	14,190,006	79	25,103,049	25,814,550	14,024,762	
<< Unassigned >>			0	0	1,121,387	0	1,128,379	822,139	0	0	0	1,049,681	
Ajay Malgaonkar			162,402	162,402	103,989	0	102,416	66,205	62	169,164	169,164	0	
DACS	India		115,947	115,947	92,638	0	91,252	58,954	78	120,777	120,777	0	
		Capital Bank of Jordan		0	11,232	0	11,712	5,280	0		0	0	
		IBM Middle East FZ-LLC							0		78,543	0	
		Intelective							0		42,234	0	
IM&A	India								6	27,075	27,075	0	
		IBM Middle East FZ-LLC							0		10,977	0	
		Intelective							0		16,098	0	
QA&TA	India		20,460	20,460	9,751	0	9,564	6,803	46	21,312	21,312	0	
		ECS ME LLC		12,000	0	0	0	0	0		12,501	0	
		IBM Middle East FZ-LLC		8,460	9,751	0	9,564	6,803	0		8,811	0	
Barry Walwyn			0	0	0	0	0	420	0	0	0	0	
Brandon Barry			1,456,620	1,589,954	886,475	0	878,191	672,152	62	1,798,557	1,937,445	633,769	

Targets: Targets provided by Sales Executives.

Customer Mappings: These are customer targets provided at Sales Executive, Practice and country level by Finance Team.

Calls: SF Revenue + Planned revenue. (For current month 15 th we will consider Planned Revenue and after 15 th Rec Revenue will consider).

SF Revenue: If ADD to Call flag is checked for Opportunity then Revenue is considered in SF Revenue column.

Planned Revenue: It is based on the planning hrs of project in capacity plan.

Recognized Revenue: It is the recognized amount of that project.

Attain %: (Call /Target)*100.

Note: We are not Considered Closed one stage in Services.

If any data added in Sales force, that should sync to PPM services click on **Refresh SF Data**