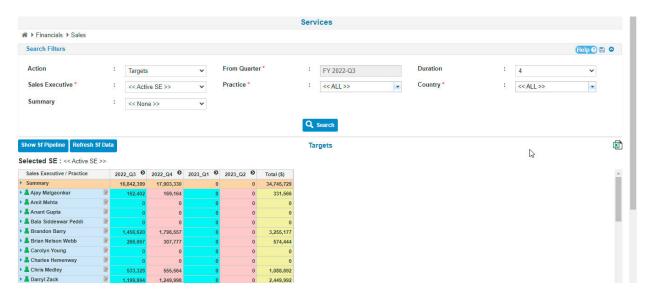
Services:



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 feature quarters to get data.
- Sales Executive: In Sales Executive filter there are three types.
 - o All SE: It shows combination of Active and Inactive Sales Executives.
 - o 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 / 2023_Q2 0 2023_Q1 O 2022_Q3 **●** 2022_Q4 **⊙** Total (\$) Practice Canada 1,376,457 1,433,802 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 UAE 0 0 0 UK 1,875,155 1,953,308 0 0 3,828,463 US 7,619,990 0 8,296,652 15,916,642 Total 16,842,399 17,903,330 0 0 34,745,729

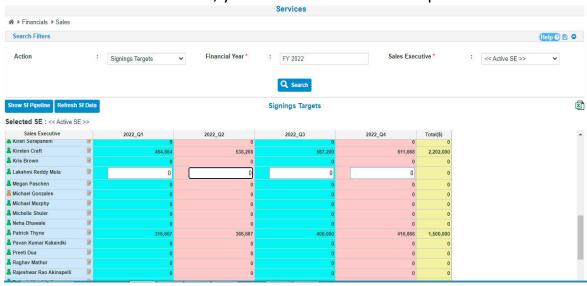
In below Targets table based on Sales executive we get targets data and is editable for who is having sales read and writable access they can edit and save targets.



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.
 - o All SE: It shows combination of Active and Inactive Sales Executives.
 - o 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

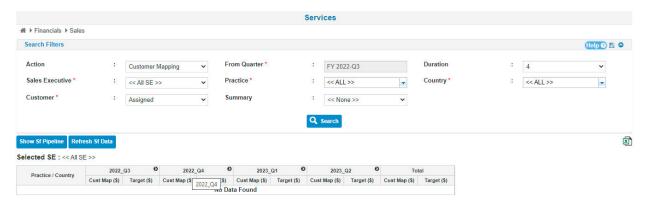


In below Targets table based on Sales executive we get targets data and is editable for who is having sales read and writable access they can edit and save targets.

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.

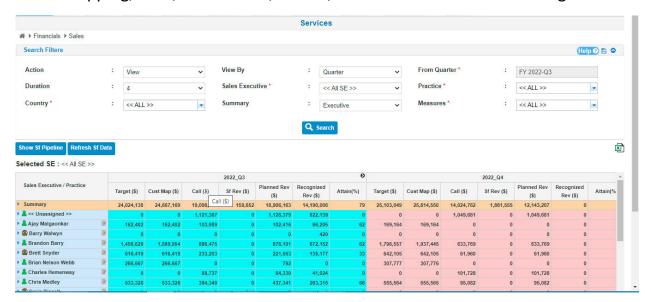
- Active SE: if you select Active SE, It shows Active sales executive data.
- Select SE: In select SE, you can select one or multiple sales executives
- Practice: In Practice filter field user can able to select one practice or multiple practices.
- Country: In Country filter field user can able to select 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.



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 feature quarters to get data.
- Sales Executive: In Sales Executive filter there are three types.
 - o 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.



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.



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



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**