Contents

Open Customer

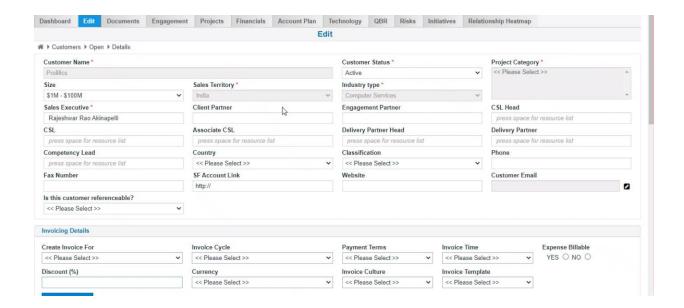Here we can see the complete details of the Customer and those related documents.

1. Dashboard

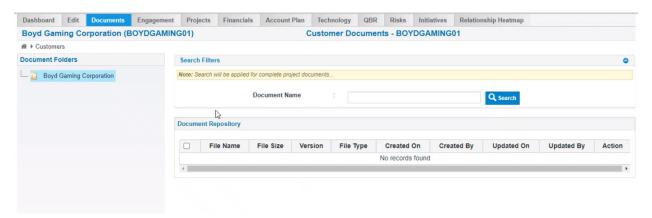Here we can see all the data that is entered while creating the Customer can been displayed

2. Edit

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

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

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 Enagagement.

5. Projects

Here we can see all the details of the Projects related to that customer and can also see the complete details in the data table with data such as Health and Start and End date of the project and by clicking on project name.

6. Financials

Here by selecting the Month and the duration for which the data needs to be populated can be selected and in that we can see the customer data with the GM% of that customer for each month and average for the duration selected.

7. Account Plan

Here we can view the Account plan in different types such ad 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

Actual revenue of the customer

Comparing both the Actual and Planned revenue of the customer.

8. Technology

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

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.

9. QBR

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

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.

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.

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   ✖

rent S

Initiative *   :   [Max 50 characters]

Function Area *   :   [Max 50 characters]

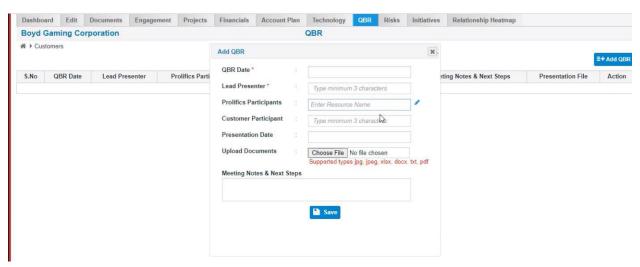Current Status *   :   [Max 50 characters]

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   ≡+ Add

S.No	Name	Title	Department	Priority	Relationship Strength	Engagement Level	Role Description	FY Mandate	Action
					No Records To View				

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

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

Relationship Heatmap

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

Boyd Gaming Corporation   **Relationship Heatmap**

🏠 ▶ Customers

● Negative   ● Neutral   ● Advocate   ● Champion

☰+ Add

Show 10 ⌄ entries   Search: _____

S.No	Name	Title	Department	Priority	Relationship Strength	Engagement Level	Role Description	FY Mandate	Action
1	trert	test	test	Medium	Negative	Prolifics Demo / Workshop			✏️ 🗑️

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