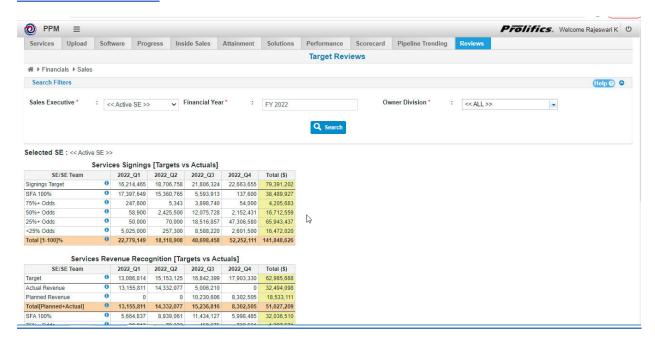# Review in Sales:

Filters:

- **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 multiple sales executives
- **Financial year and Quarters:** Default current financial year will be selected in quarter's field can select number of quarters data should show.
- **Owner Division:** Sales Executive will tag to division, when search with sales executive data will get based on owner division.

Service Signings:

- **Signings Target:** Signing's target provided at Sales executive level in Services
- **SFA 100%:** Closed won opportunities amount taken from Salesforce based on Opportunities Closed date.
- **75% + Odds:** Closing opportunities amount in between 75-99% probability based on Opportunities Closed date.
- **50% + Odds:** Closing opportunities amount in between 50-74% probability based on Opportunities Closed date.

- **25% + Odds:** Closing opportunities amount in between 25-49% probability based on Opportunities Closed date.
- **<25% + Odds:** Closing opportunities amount less than 25% probability (excluding 0%) based on Opportunities Closed date.
- **Total [1-100]%:** Closed or closing opportunities amount in between 1-100% probability based on Opportunities Closed date.

Services Signings [Targets vs Actuals]

SE/SE Team		2022_Q1	2022_Q2	2022_Q3	2022_Q4	Total ($)
Signings Target	ⓘ	16,214,465	18,706,758	21,806,324	22,663,655	79,391,202
SFA 100%	ⓘ	17,397,649	15,360,765	6,589,002	137,600	39,485,016
75%+ Odds	ⓘ	247,600	5,343	3,946,028	0	4,198,971
50%+ Odds	ⓘ	58,900	2,425,500	10,718,238	4,167,631	17,370,269
25%+ Odds	ⓘ	50,000	70,000	15,067,507	49,697,850	64,885,357
<25% Odds	ⓘ	5,025,000	257,300	7,221,720	3,500,500	16,004,520
Total [1-100]%	ⓘ	22,779,149	18,118,908	43,567,495	57,503,581	141,969,133

Service Revenue Recognition:

- **Target:** Targets provided at sales executive, practice & country level in services
- **Actual Revenue:** Recognised revenue considering the Cut-off date (EX: Previous month recognized revenue is considered after 15th of this month)
- **Planned Revenue:** Planned revenue is based on the planning hrs of the project in capacity plan (Planned revenue is considered if Recognized revenue is not considered)
- **Total:** It is the sum of Actual revenue & Planned Revenue
- **SFA 100%:** P/R revenue equal to 100% probability
- **75% + Odds:** P/R revenue in between 75-99% probability based on P/R start and end date.
- **50% + Odds:** P/R revenue in between 50-74% probability based on P/R start and end date.
- **25% + Odds:** P/R revenue in between 25-49% probability based on P/R start and end date.
- **<25% + Odds:** P/R revenue less than 25% probability (excluding 0%) based on P/R start and end date.
- **Total [1-100]%:** P/R revenue in between 1-100% probability based on P/R start and end date.

Services Revenue Recognition [Targets vs Actuals]

SE/SE Team		2022_Q1	2022_Q2	2022_Q3	2022_Q4	Total ($)
Target	ⓘ	13,086,814	15,153,125	16,842,399	17,903,330	62,985,668
Actual Revenue	ⓘ	13,155,811	14,327,122	4,971,716	0	32,454,649
Planned Revenue	ⓘ	0	0	10,192,592	9,560,367	19,752,959
Total[Planned+Actual]	ⓘ	13,155,811	14,327,122	15,164,308	9,560,367	52,207,608
SFA 100%	ⓘ	0	0	0	0	0
75%+ Odds	ⓘ	0	0	0	0	0
50%+ Odds	ⓘ	0	0	0	0	0
25%+ Odds	ⓘ	0	0	0	0	0
<25% Odds	ⓘ	0	0	0	0	0
Total [1-100]%	ⓘ	0	0	0	0	0

0

Software:

- **Software Target: Recurring:** Software GM that is predictable - specifically renewals (on premise or SaaS).
- **Software Target: Influence:** Software GM that we earn as a fee on a specific transaction. In these situations, a different company (the vendor or a competitor) has sold the software directly to the client, and we are earning a fee for our role in identifying, progressing or closing the sale.
- **Software Target: New Resell:** Software GM that is generated by Prolifics reselling new software transactions (on premise or SaaS).
- **Total:** Total Targets
- **Closed Amount:** Closed won amount taken from Salesforce based on Opportunities Closed date and under closed amount included below three types New, Recurring and influence closed amount taking from sales force
  - **New**: Transaction Type = Resell/Education Resell/Rebates, Renewal = "0" ,then "Net Profit" amount is considered for NEW closed type.
  - **Recurring**: Transaction Type = Resell, Renewal = "1", then "Net Profit" amount is considered for Recurring closed type.
  - **Influence**: Transaction Type= Influence, then "Opportunities" amount is considered for Influence closed type.

Software [Targets vs Actuals]

SE/SE Team		2022_Q1	2022_Q2	2022_Q3	2022_Q4	Total ($)
Software Target : Recurring	❶	164,484	320,774	365,035	311,329	1,161,622
Software Target : Influence	❶	150,000	25,000	1,997,310	25,000	2,197,310
Software Target : New Resell	❶	410,562	406,669	1,350,812	387,987	2,556,030
Total	❶	725,046	752,443	3,713,157	724,316	5,914,962
▼ Closed Amount	❶	449,314	1,259,451	650,792	29,800	2,389,357
New	❶	262,322	826,372	389,645	14,000	1,492,339
Recurring	❶	219,666	430,079	389645 5	15,800	843,230
Influence	❶	-32,674	3,000	83,462	0	53,788
Unclosed Calls	❶	0	0	2,445,052	320,597	2,765,649
Upside	❶	8,000	0	3,095,384	585,492	3,688,876
Other Pipeline	❶	0	0	563,855	579,619	1,143,474
Total	❶	457,314	1,259,451	6,755,083	1,515,508	9,987,356

- **Unclosed calls:** Calls Amount – Closed Amount
- **NEW :** License Type = New/Saas Cloud New ; Transaction Type = Resell/Education Resell/Rebates/Adjustments then "Opportunity Amount" amount is considered for NEW Unclosed Calls.
- **RENEWAL** : License Type = Renewal/Saas Cloud Renewal/Renewal Subscription; Transaction Type = Resell then "Opportunity Amount" amount is considered for Recurring Unclosed Calls.
- **INFLUENCE :** License Type = Blank ; Transaction Type = Influence, then "Opportunities " amount is considered for Influence Unclosed Calls.

- **Upside:** Upside amount taken from software tab of sales module.
  - **NEW :** License Type = New/Saas Cloud New ; Transaction Type = Resell/Education Resell/Rebates/Adjustments then "Opportunity Amount" amount is considered for NEW Unclosed Calls.
  - **RENEWAL** : License Type = Renewal/Saas Cloud Renewal/Renewal Subscription; Transaction Type = Resell then "Opportunity Amount" amount is considered for Recurring Unclosed Calls.
  - **INFLUENCE :** License Type = Blank ; Transaction Type = Influence, then "Opportunities " amount is considered for Influence Unclosed Calls

- **Other Pipeline:** Total Amount – [Closed Amount + Upside Amount + Unclosed Calls Amount]
- **NEW :** License Type = New/Saas Cloud New ; Transaction Type = Resell/Education Resell/Rebates/Adjustments then "Opportunity Amount" amount is considered for NEW Unclosed Calls.
- **RENEWAL** : License Type = Renewal/Saas Cloud Renewal/Renewal Subscription; Transaction Type = Resell then "Opportunity Amount" amount is considered for Recurring Unclosed Calls.
- **INFLUENCE :** License Type = Blank ; Transaction Type = Influence, then "Opportunities " amount is considered for Influence Unclosed Calls.
- **Total:** Total Software Opportunities amount taken from Salesforce based on Opportunities Closed date.

Note: Prolifics - Jam/Panther/XMLink vendor opportunities amount are not considered.

- **Stages we are considering**
  - Closing
  - Closed Won
  - Conditional Agreement
  - Draft proposal delivered
  - Sow proposal delivered
  - Qualified
  - Validated