

CallidusCloud UI Guidelines

Version 3.0

Vision for end to end customer experience





Cohesive end-to-end customer
experience



CallidusCloud

End-To-End Customer Experience - CallidusCloud

The Power of Experience
Customer experience is your greatest differentiator.
Without doubt, it is always possible.

WHAT WILL YOU # Register Today

CALLIDUSCLOUD / Get the 2017

Web

The Power Experience

Education

Support

Opportunities

Selected Opportunity Name

Commissions

Plans

Details

OPPORTUNITIES

Opportunity	Stage	Rep	ACV	Last Contact
Big Enterprise 113	Prospect	Tammy Chambers	\$1,385,000.00	2017-09-06
Medium SMB 123	Evaluation	Andrew Castle	\$250,000.00	2017-02-28
Small Business 1	Contract	Pauline Brook	\$165,000.00	2017-09-28
Z Business 11	Discovery	Noel Kennedy	\$796,000.00	2017-01-15

TASKS

- REVIEW: Purchase Orders Due: 3/1/2017
- RESPOND: Compensation Approval Due: 4/4/2017
- REVIEW: Quarterly Expenses Due: 5/1/2017
- REVIEW: Quarterly Targets Due: 5/1/2017

COMMISSIONS EXPENSES

Commissions Spend by Product

COMMISSIONS EXPENSE PROJECTION

95% Confidence Interval

CallidusCloud

From Advertising > Education > Product > Support
Seamless, integrated experience from customer perspective

3rd Party Integration

Example: CPQ Stand Alone

Configure, Price and Quote ▾

CallidusCloud

CPQ User ▾ Help

Quotes Catalog Setup

Quote #1001001

Quotation Additional Information Customer Information Documents

Products ▾

Manage Items Add items...

Items	Quantity	List Price	Extended List Price	Discount Percent	Discount Amount	Net Price	Extended Amount	Margin Health
Item really long name, probably a table	1	\$700.00	\$700.00	0	\$0.00	\$700.00	\$700.00	✓
Item name	1	\$700.00	\$700.00	0	\$0.00	\$700.00	\$700.00	✓

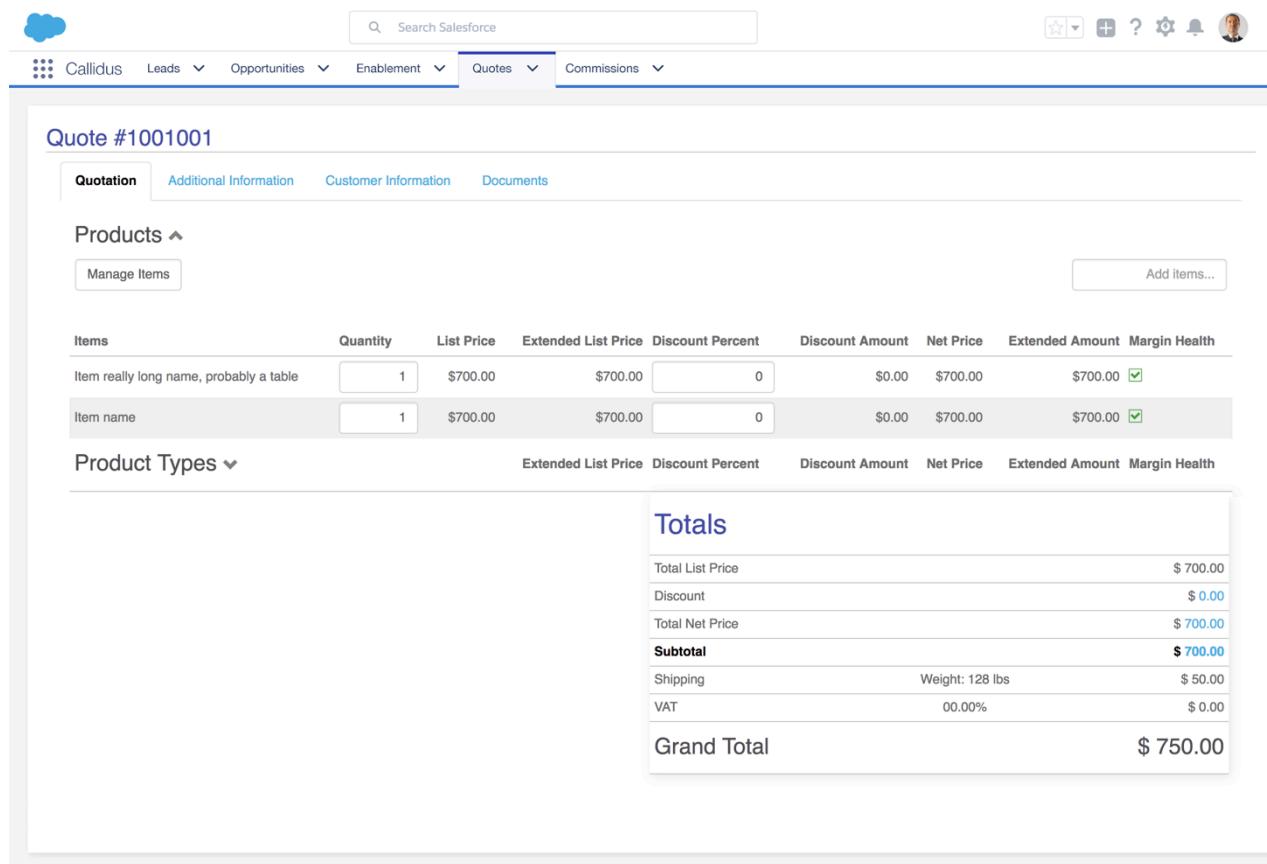
Product Types ▾

Extended List Price	Discount Percent	Discount Amount	Net Price	Extended Amount	Margin Health
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Totals

Total List Price	\$ 700.00	
Discount	\$ 0.00	
Total Net Price	\$ 700.00	
Subtotal	\$ 700.00	
Shipping	Weight: 128 lbs	\$ 50.00
VAT	00.00%	\$ 0.00
Grand Total	\$ 750.00	

Example: CPQ - Integrated SFDC



The screenshot shows the Salesforce CPQ interface for a quote. The top navigation bar includes the Callidus logo, a search bar, and various menu items: Leads, Opportunities, Enablement, Quotes (selected), and Commissions. The main content area displays Quote #1001001. The quote details are organized into sections: Quotation, Additional Information, Customer Information, and Documents. The Products section shows a table of items with columns for Items, Quantity, List Price, Extended List Price, Discount Percent, Discount Amount, Net Price, Extended Amount, and Margin Health. Two items are listed: "Item really long name, probably a table" and "Item name". The Product Types section is partially visible. The Totals section at the bottom summarizes the quote's financials.

Items	Quantity	List Price	Extended List Price	Discount Percent	Discount Amount	Net Price	Extended Amount	Margin Health
Item really long name, probably a table	1	\$700.00	\$700.00	0	\$0.00	\$700.00	\$700.00	<input checked="" type="checkbox"/>
Item name	1	\$700.00	\$700.00	0	\$0.00	\$700.00	\$700.00	<input checked="" type="checkbox"/>

Product Types	Extended List Price	Discount Percent	Discount Amount	Net Price	Extended Amount	Margin Health

Totals	
Total List Price	\$ 700.00
Discount	\$ 0.00
Total Net Price	\$ 700.00
Subtotal	\$ 700.00
Shipping	Weight: 128 lbs
VAT	00.00%
Grand Total	\$ 750.00

Example: T&Q - Stand Alone

Territory And Quota ▾

Administrator ▾ Help

Home Organization **Territory Admin** Reports Updates

Default Period January 2017

Search within this page Advanced Search ▾

Manage Territories

Territory Program	Territory	Assignee
2016 Primary Sales	US	VP (Todd Allen)

Target Renewals

Assigned Targets \$12,500,000.00

Apply uplift...

Target for Allocation \$12,500,000.00

Distribution Method ▾

- Evenly
- Historical Fair Share
- Opportunity Fair Share
- Weighted Fair Share

Territory ↓	Assignee ↗	Current Value	Percent	Case Status	Actions
Territory101	AE 1 (Sandra Martinez)	\$4,000,000.00	33%	Distributed	⋮
Territory102	AE 2 (Colleen Wallace)	\$4,000,000.00	<input type="checkbox"/> 33%	Distributed	⋮
Territory103	AE 3 (Sandra Martinez)	\$4,000,000.00	<input type="checkbox"/> 33%	Distributed	⋮
Total		\$12,000,000.00			

Reset Distribute Save

Historic Sales

Territory	2013	2014	2015
Territory101	\$20M	\$50M	\$35M
Territory102	\$22M	\$60M	\$37M
Territory103	\$19M	\$45M	\$32M

Opportunity

Territory	Sales (\$M)
Territory101	\$65M
Territory102	\$85M
Territory103	\$75M

Example: T&Q - Integrated SFDC

Salesforce interface showing the integration of Territory & Quota management with the Salesforce platform.

Header: Callidus, Leads, Opportunities, Enablement, Territories, Commissions.

Search Bar: Search Salesforce.

Left Panel: Manage Territories

- Territory Program:** 2016 Primary Sales
- Territory:** US
- Assignee:** VP (Todd Allen)

Allocation Settings:

- Target:** Renewals
- Assigned Targets:** \$12,500,000.00
- Target for Allocation:** \$12,500,000.00

Distribution Method: Evenly (selected), Historical Fair Share, Opportunity Fair Share, Weighted Fair Share.

Territory	Assignee	Current Value	Percent	Case Status	Actions
Territory101	AE 1 (Sandra Martinez)	\$4,000,000.00	33%	Distributed	⋮
Territory102	AE 2 (Colleen Wallace)	\$4,000,000.00	<input type="checkbox"/> 33%	Distributed	⋮
Territory103	AE 3 (Sandra Martinez)	\$4,000,000.00	<input type="checkbox"/> 33%	Distributed	⋮
Total		\$12,000,000.00			

Buttons: Reset, Distribute, Save.

Right Panel: Historic Sales

Sales (millions) vs. Territory over years.

Territory	2013	2014	2015
Territory101	\$20M	\$50M	\$35M
Territory102	\$22M	\$60M	\$37M
Territory103	\$19M	\$45M	\$32M

Right Panel: Opportunity

Sales (%) vs. Territory.

Territory	Sales (\$M)
Territory101	\$65M
Territory102	\$85M
Territory103	\$75M

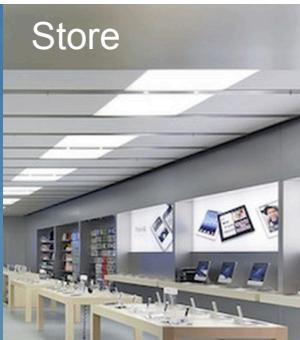
Backup

Reference Example: End-To-End Customer Experience - Apple

Ad



Store

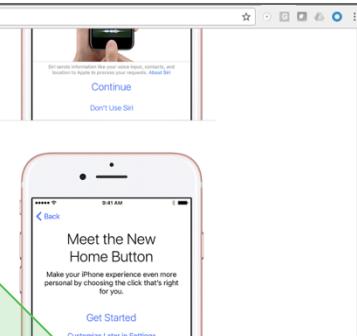


Support

8 Customize the click of your Home button

If you have an **iPhone 7** or **iPhone 7 Plus**, you can set up how your Home button responds when you press it. Just tap an option, then press the Home button to give it a try. To set the one you like best, tap **Next**.

If you want to skip this screen or want to set up your Home button later, tap **Customize Later** in **Settings**.

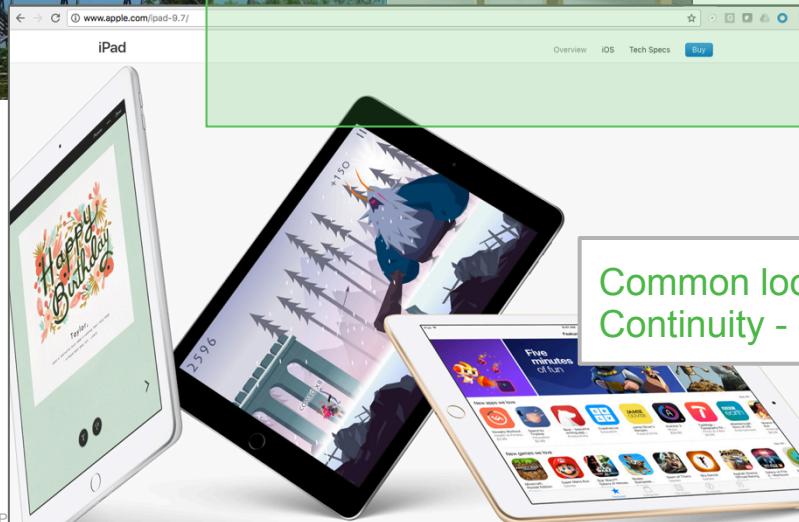


Product

9 Choose settings for app analytics and display re



Web



Common look and feel at every touchpoint
Continuity - Brand recognition



