

CallidusCloud UI Guidelines

Version 3.0

Vision for end to end customer experience

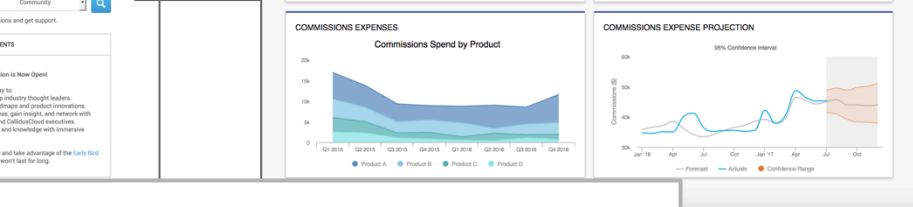
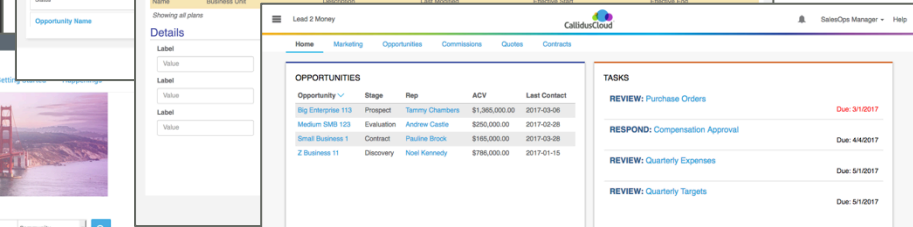
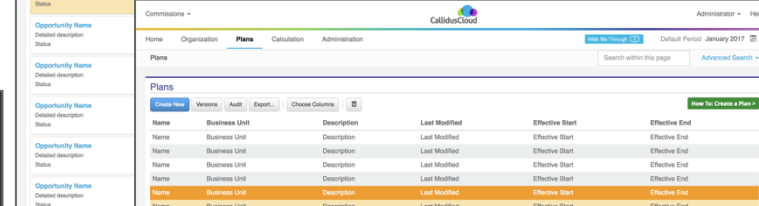
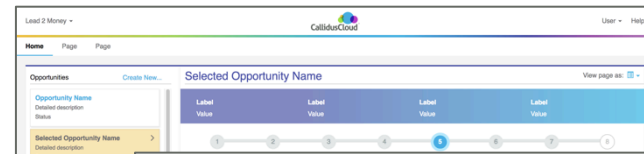
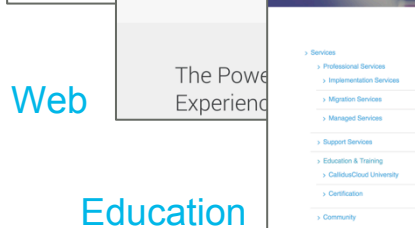
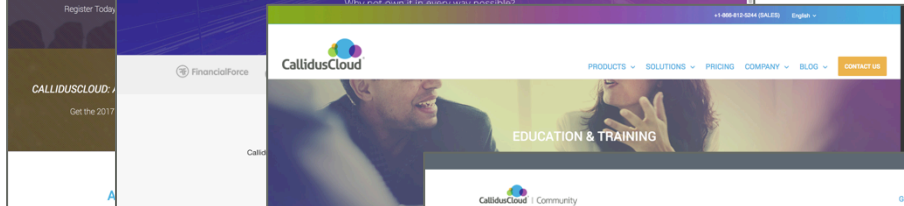
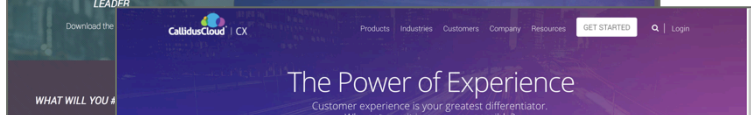
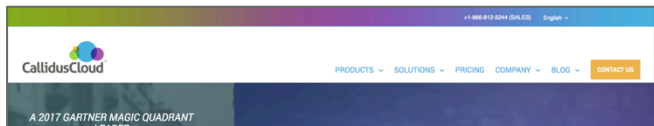




Cohesive end-to-end customer experience

End-To-End Customer Experience - CallidusCloud

Product




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

QuotesCatalogSetup

Quote #1001001

QuotationAdditional InformationCustomer InformationDocuments

Products

Manage ItemsAdd 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
--	---------------------	------------------	-----------------	-----------	-----------------	---------------







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




Search Salesforce





Callidus Leads Opportunities Enablement **Quotes** Commissions


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
--	---------------------	------------------	-----------------	-----------	-----------------	---------------

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: T&Q - Stand Alone

Territory And Quota

CallidusCloud

Administrator Help

HomeOrganizationTerritory AdminReportsUpdates

Default Period January 2017

Manage Territories

Search within this pageAdvanced Search

Territory ProgramTerritoryAssignee

2016 Primary SalesUSVP (Todd Allen)

TargetRenewals

Assigned Targets\$12,500,000.00

Target for Allocation\$12,500,000.00

Apply uplift...Distribution Method

EvenlyHistorical Fair ShareOpportunity Fair ShareWeighted 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	33%	Distributed	
Territory103	AE 3 (Sandra Martinez)	\$4,000,000.00	33%	Distributed	
Total		\$12,000,000.00			

ResetDistributeSave


Historic Sales

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

Opportunity

Territory	Opportunity
Territory101	\$65M
Territory102	\$85M
Territory103	\$75M

Example: T&Q - Integrated SFDC



Search Salesforce

Callidus

Leads

Opportunities

Enablement

Territories

Commissions

Search within this pageAdvanced Search

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

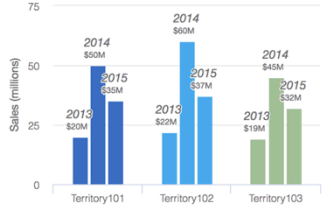
Territory	Assignee	Current Value	Percent	Case Status	Actions
Territory101	AE 1 (Sandra Martinez)	\$4,000,000.00	33%	Distributed	
Territory102	AE 2 (Colleen Wallace)	\$4,000,000.00	33%	Distributed	
Territory103	AE 3 (Sandra Martinez)	\$4,000,000.00	33%	Distributed	
Total		\$12,000,000.00			

Reset

Distribute


Save

Historic Sales



Territory	2013	2014	2015
Territory101	\$20M	\$50M	\$35M
Territory102	\$27M	\$60M	\$37M
Territory103	\$19M	\$45M	\$32M

Opportunity



Territory	Sales (%)
Territory101	\$65M
Territory102	\$89M
Territory103	\$79M

Backup

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

