Opportunity Export

Top Quotation Upfront Revenue

Upfront revenue is adding all upfront income to the business from a deal. The values taken into account are after upfront discounts.

This includes:

Service Upfront values

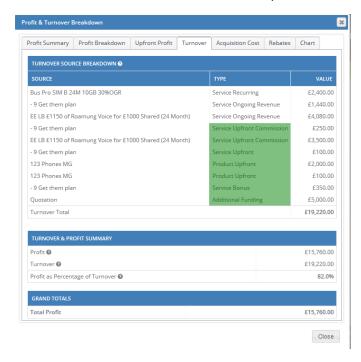
Service Upfront Commissions

Service Bonus

Product upfront values

Additional Funding

The breakdown of this can be found in the profit breakdown against each quotation.

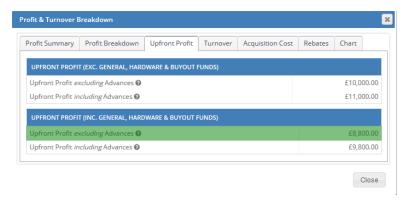


If you want you can double check the values from finance report

Top Quotation Upfront Profit (Inc Funds)

'Upfront profit (Inc. Funds)' is calculated from all upfront profits taking away upfront discounts and funds applied.

You can find the upfront profit (Inc Funds) in the quotation profit breakdown, Tab Upfront Profit. See image below:



If you would like to calculate the upfront profits (Inc. Funds) from the finance report simply add up all upfront profit values and take off upfront discounts as well as funds.

Funds which we are referring to:

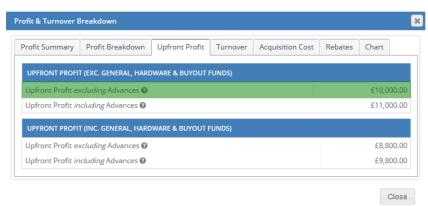
Hardware Fund, Buyout Fund, General Fund.



Top Quotation Upfront Profit (Exc. Funds)

'Upfront profit (Exc. Funds)' is calculated from all upfront profits taking away upfront discounts.

You can find the upfront profit (Exc. Funds) in the quotation profit breakdown, Tab Upfront Profit. See image below:

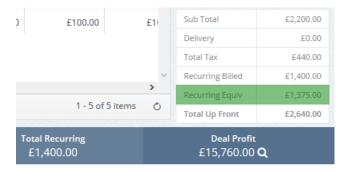


If you would like to calculate the upfront profits (Exc. Funds) from the finance report simply add up all upfront profit values and take off upfront discounts and Deal Termination.



Top Quotation Recurring Revenue (1st Month Total)

This value is calculated from Service recurring monthly sell price. The values take into account variable pricing and subsidy. Due to possible different terms against each tariff the recurring revenue could differ after period of time. For example, if customer is on a rolling contract or 12 months term for specific tariffs. This value can be found in the quotation builder



The breakdown of the recurring equivalent can also be viewed in the finance report per tariff in Rec Net column:

The Recurring Sell price minus the subsidy per month. Note the subsidy displayed below is against full term. Therefore, it would be $\pm 600 / 24 = \pm 25$ subsidy per month.

SER	SERVICES (21)																
Qty	Category	Class	Supplier	Service	Term	UF Buy	UF Sell	Disc	Rec Buy	Rec Sell	Comm	Bonus	Subsidy	Rec Net	OGR%	OGR/Term	Net Comm
10	Additional Sharer		ACME Future Telecom	- 9 Get them plan	24m	£10.00	£15.00	£50.00	N/A	£30.00	£250.00	£350.00	£600.00	£275.00	20.00%	£1,440.00	-£350.00
1	Voice Bolt-On Roaming (Shared)	New	EE	EE LB £1150 of Roamung Voice for £1000 Shared (24 Month)	24m	£0.00	£0.00	£0.00	N/A	£1,000.00	£3,500.00	£0.00	£0.00	£1,000.00	17.00%	£4,080.00	£3,500.00
10	Voice (Single)	New	EE	Bus Pro SIM B 24M 10GB 30%OGR	24m	£0.00	£0.00	£0.00	£10.00	£10.00	£0.00	£0.00	£0.00	£100.00	0.00%	£0.00	£0.00
21						£100.00	£150.00	£50.00	£100.00	£1,400.00	£3,750.00	£350.00	£600.00	£1,375.00	~12.00%	£5,520.00	£3,150.00

Top Quotation Recurring Profit (1st Month OGR)

Recurring profits from OGR per month are calculated as follows:

(Recurring Sell Price * OGR % * Qty) – Subsidy

See example below:

SERVICES (21)																		
Qty	Category	Class	Supplier		Service	Term	UF Buy	UF Sell	Disc	Rec Buy	Rec Sell	Comm	Bonus	Subsidy	Rec Net	OGR%	OGR/Term	Net Comm
10	Additional Sharer		ACME Future Telecom		- 9 Get them plan	24m	£10.00	£15.00	£50.00	N/A	£30.00	£250.00	£350.00	£600.00	£275.00	20.00%	£1,440.00	-£350.00
1	Voice Bolt-On Roaming (Shared)	New	EE	EE LB									£0.00	£0.00	£1,000.00	17.00%	£4,080.00	£3,500.00
10	Voice (Single)	New	EE	£30 * 20% * 10 = £60 - 25 subsidy = £35 £1000 * 17% * 1 = £170 - 0 subsidy = £170										£0.00	£100.00	0.00%	£0.00	£0.00
Recurring Profit = £205										0.00	£600.00	£1,375.00	~12.00%	£5,520.00	£3,150.00			

Top Quotation Recurring Profit (1st Month Wholesale)

Recurring profits from Recurring Margins are calculated as follow:

(Recurring Sell Price - Recurring Buy Price) * Qty

See example below:

SER	ICES (4)																
Qty	Category	Class	Supplier	Service	Term	UF Buy	UF Sell	Disc	Rec Buy	Rec Sell	Comm	Bonus	Subsidy	Rec Net	OGR%	OGR/Term	Net Comm
3	Voice (Single)	Upgrade	EE	Bus Pro SIM B 24M 10GB 30%OGR	24m	£0.00	£0.00	£0.00	£10.00	£15.00	£0.00	£0.00	£0.00	£45.00	0.00%	£0.00	£0.00
1	Additional Sharer		ACME Future Telecom	- 9 Get them plan	24m	£10.00	£15.00	£5.00	N/A	£30.00	£25.00	£35.00	£0.00	£30.00	20.00%	£144.00	£25.00
4				(Recurring Sell -	Dagueri	na Pund	* Ob	Danu	min a Dua	fit Mana	00	£35.00	£0.00	£75.00	~10.00%	£144.00	£25.00
PROI	DUCTS (2)			(£15 - £10) * 3 =		, ,,	- Qty –	Recui	ring Pro	iit iviarg	""						

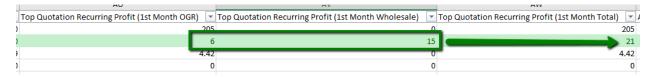
Top Quotation Recurring Profit (1st Month Total)

Total Recurring profit is adding both types of recurring profits together:

Recurring Margin Profit + Recurring OGR Profit

OR

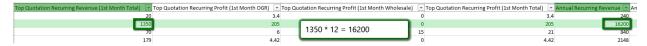
Top Quotation Recurring Profit (1st Month OGR) + Top Quotation Recurring Profit (1st Month Wholesale)



Annual Recurring Revenue

Annual Recurring Revenue is calculated as follows:

Top Quotation Recurring Revenue (1st Month Total) * 12



Annual Recurring Profit

Annual Recurring Profit is calculated as follows:

Top Quotation Recurring Profit (1st Month Total) * 12



Top Quotation Profit

Top quotation profit is an overall profit of the deal which includes all profits and takes off all funds and discounts applied.

The deal profit is displayed in the quotation builder.

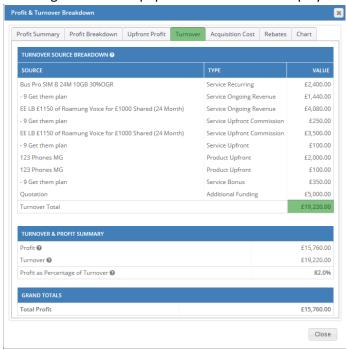


In the finance report the deal profit is shown at the very bottom of the page. Note the HB (Holdback) value is not presented in the opportunity export.



Top Quotation Turnover

Top Quotation Turnover is calculated from the upfront and recurring revenue taking off upfront and recurring discounts. Top quotation turnover is displayed in deal profit breakdown:



Top Quotation Turnover (1st Year)

Top Quotation Turnover (1st Year) is calculated as follows:

Annual Recurring Revenue + Top Quotation Upfront Revenue

