

Corporate Goals

Overview

The corporate goals page shows a listing of ALL goals set up for your company, but also allows you to set a company wide goal for all users to see.

Listing

This listing will show all goals set up for your company, whether they are company wide or sales rep specific. You can view the details of any goal, or assign any goal as a primary goal here.

Setting up a new corporate Goal

At the bottom of the listing is a **New Goal** button. Clicking this will present you with the goal setup page.

XCreate Goal

Name:

Sales Target - 2022

Type:

Percent Increase

Branch:

(All)

Duration:

☒ Annual
☐ Monthly

Sales Rep ID:

#####

Value:

11.2%

Previous Total:

Goal Amount:

12168043.44

13530864.31

Cancel

Create

When setting up a corporate goal, the following should be filled in:

- Name - The name that will show associated to this goal
- Type - Percent increase, which will set a percentage increase of sales over last year
- Branch - Optionally pick a single branch for this goal to be assigned
- Duration - Either a single month's goal, or an annual goal which will create 12 monthly goals
- Sales Rep - For a corporate goal, the sales rep is not set.
- Value - The percentage of increase you would like the sales to increase by

Once a corporate goal is set, all of your users will be able to view it and/or apply it to their account as a primary goal with prominent placement on the homepage.

Goals are calculated on a nightly basis, so immediately after setting up a goal, it will not be visible.

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