Sales Targets

Fuse5 allows you to create sales targets that can be displayed as graphs on your homepage and also be referenced as reports within the Fuse5 reporting interface. We offer the capability to create the following targets:

1. Location (Sales Targets) – Sales targets and Goals based on sales orders to accounts / customers that have the specific location as their default location.

2. Sales Area (Sales Targets) – Set up Sales Areas to get a cumulative goal and actual for multiple locations

3. Sales People (Sales Targets) – Sales targets and Goals based on the sales person designated in the account records

4. Counter People (Sales Targets) – Sales targets and Goals based on the counter person the finalized the sales order

5. Sales People Collections – Collections targets and Goals based on ROAs (Received on Account) done for accounts with the selected user designated as the sales person in the account record

6. Location Collections – Collections targets and Goals based on ROAs (Received on Account) done for accounts with the selected location as the default location

7. Sales Area Collections - Set up Sales Areas to get a cumulative goal and actual for multiple locations

All of these targets will be entered into Fuse5 by going to DATA TOOLS > SALES TARGETS. Prior to setting sale and collections goals you will want to identify the number of business days for the month you are setting goals for. Do this by going to the "Sales Days Calendar" option at the bottom of this interface.


Click here to set the Calendar Days that your Targets will be based off of. This needs to be set in order for the Targets to display on the Dashboard.

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You can choose the year and month with the "Prev Year", "Prev Month", "Next Month" and "Next Year" buttons or by clicking on the appropriate month you are looking to edit.
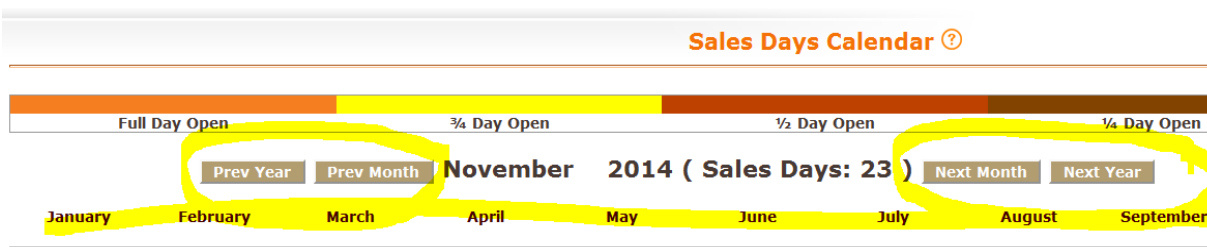
Once you have identified the month for which you want to set targets you need to let Fuse5 know which days of the month are FULL DAY OPEN, ¾ Days Open, ½ Days Open, ¼ Days Ope, or Full Day Closed. The default setting is FULL DAY OPEN which is "orange". For those days that you are open a full day you should not have to do anything.
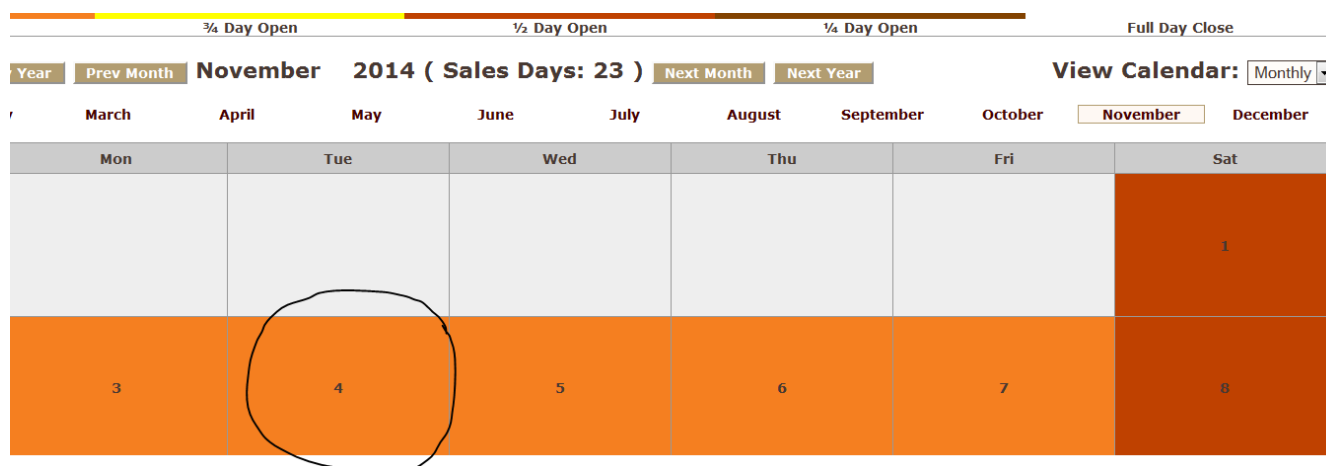
For those days that you are not open the entire day simply begin clicking the date and you will see that it will change from orange, to yellow, to red, to brown, to white which matches up to the amount of the day you are open. Once done you will see the number of (Sales Days) for the month which is the basis for determining daily goals.

Sales Days Calendar ☺

| | ¾ Day Open | | ½ Day Open | | ¼ Day Open | | |

ear | Prev Month | **November** | **2014 (Sales Days: 20 ½)** | Next Month | Next Year | | **View**

| March | April | May | June | July | August | September | October | N |

Mon	Tue	Wed	Thu	Fri
3	4	5	6	7

Once your done setting up the calander you can choose to begin setting up one of your targets using the short cuts on the left side of the screen. Alternatively, you can go back to DATA TOOLS > SALES TARGETS.

To set up your targets choose the category for which your targets will be applied. In this case I'll choose Location.

To set the Location Sales Targets that will appear on the Dashboard click here. Your locations will automatically appear and will be available to select and to add a sales target. To be able to view the target on the Dashboard make sure the Custom Setting 'View Sales Target Graph By Location' and User Setting is turned on under 'Dashboard'. Make sure that your Sales Days Calendars is properly set.

Use the ADD NEW LOCATION TARGET button on the far right to choose from among your locations. Select a location and then click ADD TARGET. If the location has already been selected previously it will tell you that "Location Target Already Generated".   Once you have selected the location you can use the EDIT button under the action column to set your goals. (Note there is also a DELETE button to delete location targets if desired.

Once in EDIT mode you can enter both your currency (dollar) goals and the GP% you want achieved. Use the SAVE button to save your changes.
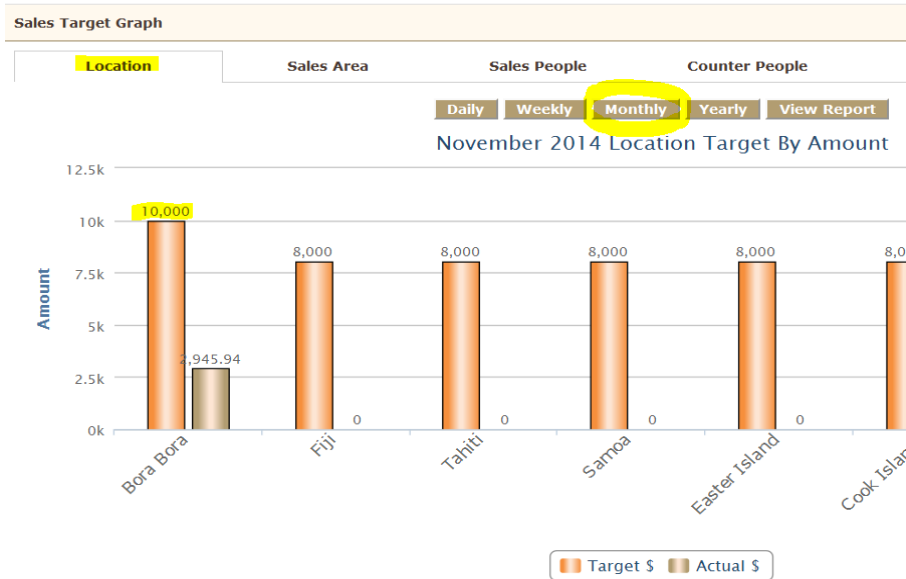
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| Location	Year	Month	$ (USD) ❓	GP% ❓	Action
Showing 1 - 12 of 12					ℹ️ Add New Location Ta
Bora Bora (Sales Area - Eastern)					
	2014	Save Cancel			📝🗑️
		January	0.00	0.00	
		February	0.00	0.00	
		March	0.00	0.00	
		April	0.00	0.00	
		May	0.00	0.00	
		June	0.00	0.00	
		July	0.00	0.00	
		August	0.00	0.00	
		September	0.00	0.00	
		October	10000.00	35.00	
		November	10000.00	35.00	
		December	10000.00	35.00	

Once targets have been set they will be visable on your home page which is accesable by clicking the fuse5 logo at the top left of your screen. Look for the graph labeled "Sales Target Graph" and choose from Location, Sales Area, Sales People, or Counter People by clicking the appropriate choice. You can use the DAILY, WEEKLY, MONTHLY, and YEARLY buttons to see different targets. The VIEW REPORT button will take you directly to the report version of the data. (This can also be accessed by going to DATA TOOLS > REPORTS > SALES TARGET reports near the bottom of the reporting page).

MONTHLY – based on the $10,000 goal we established

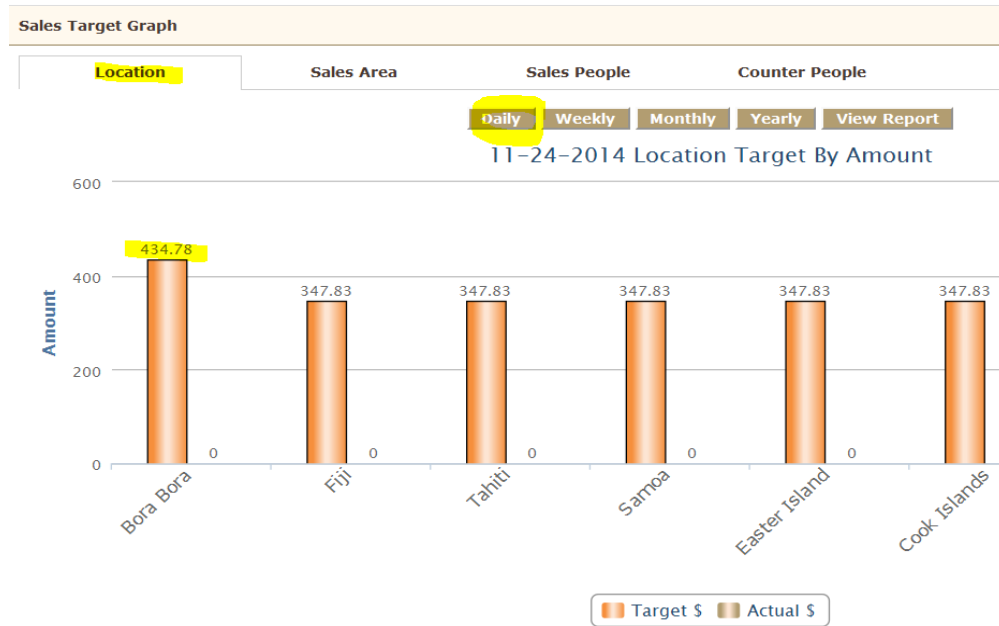

WEEKLY – The $10,000 monthly goal / 23 days = $434.78 per day * 5.75 days in the week = $2500
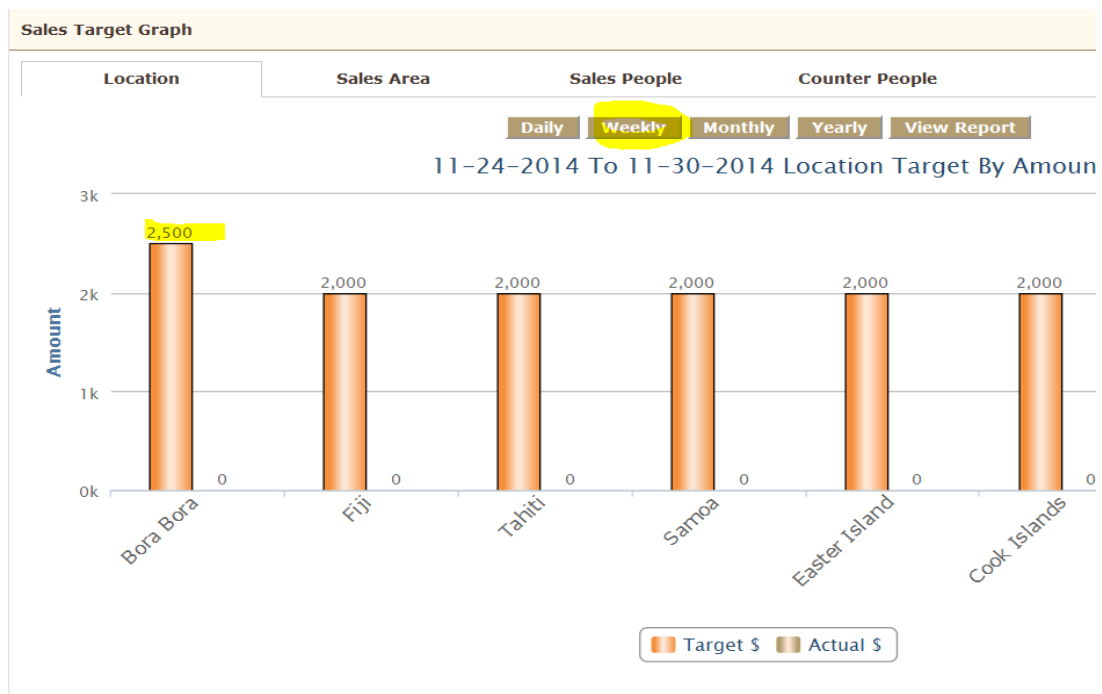
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DAILY – The $10,000 monthly goal / 23 days = $434.78 per day

You can also view reports by clicking VIEW REPORT. Once you are in the report, pick the time period and location for which you would look to review the report. Multiple locations can be selected at once.

The targets for Sales People and Counter people works very much the same as location. Use the help files in the module to help guide you through it.

The Sales Area targets are just a little different. When you choose SALES AREA you will see a tab for "Sales Area Management". In this interface you can Add Sales Areas and then assign your locations to those sales areas.

Access the Sales Area Management
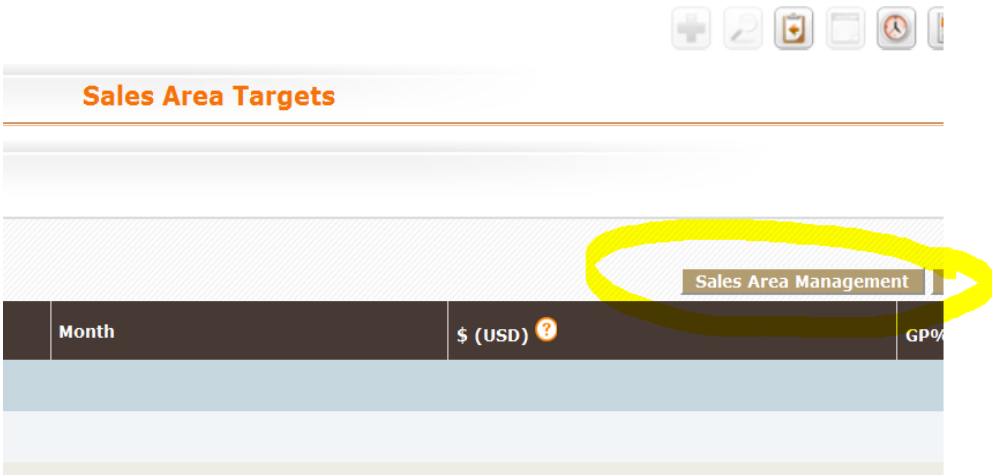
Manage your Sales Areas

You do NOT set targets for sales areas, rather they will be a cumulative of the targets you have set for the individual locations.

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Creating COLLECTIONS targets is similar to sales targets. The difference is that the actual results will be based on ROAs (Received On Account) during the selected time period. Additionally, you do not need to set GP% goals (Gross Profit).

To ensure you have your accounts set up properly to manage both sales and collections targets make sure that you have identified both the sales person and default location in the account records.

Account Information

Field	Value	Field	Value
Account Number	000304	Fax	319-471-4495
Account Name	ROBERT T SUGGS JR.	Email	dave@gofuse5.com (?)
Sales Person	JBrewster	Other Email	dennis@gofuse5.com (?)
Sales Group	Used Car Dealers, WIX Rebate Subline 9 Rebate 10%	Credit invoice email	Email (?)
Sales Area		Statement Email	Other Email (?)
Account Category	(?)	Email Opt Out	no
Website		Charge Gross Receipts Tax	No (?)
24 month payment history	230203300443210144232100	Mailing List Opt Out	
Title		Member Of	
Contact First Name	xxxx	Employees	
Contact Last Name	SMith	Annual Revenue	
Phone	319-325-9316	Default Location	Easter Island
Other Phone		Accept Aconnex Return	no
Created Time	12-21-2010 17:32:41	Aconnex Buyer ID	