

Getting Started with Goal Tracking worksheets

Summary

Goal Tracking worksheets will make it easier to plan and enter the goal information into dynaMACS.

Requirements

Knowledge of Sales Entry, Sales Analysis Reports (optional Commission Received Module)
Related topic FAQ GT_102 Setting up Goal Tracking by Customer or Rep

Module

Goal Tracking

Important Notes

1. Goal worksheets are normally printed annually (or optionally quarterly) and distributed to the appropriate people within the agency for preparation. Most agencies are given a quota by the Manufacturer and rely on Sales Reps to prepare the goals for their individual territories.
2. Each of the worksheets prints three years of sales history and a place to write the sales goal for the next year.
3. We suggest that you use one of the following Sales Analysis Reports as goal worksheets:
 - For Sales and commission goals by sales rep/manufacturer/customer (Z1C/S1).
 - For Sales and commission goals by sales rep/manufacturer (Z1C/S3).
 - For Sales goals by sales rep / manufacturer / customer (Z1/S1).
 - For Sales goals by sales rep / manufacturer (Z1/S3).
4. Review each worksheet to determine which one best meets the needs of your agency.

Solution

Printing the Goal Tracking worksheets:

1. From the Reports menu, select Sales Analysis.
2. For the Source of Data, choose Sales Entry or Shipment.
3. From the Column Set (Headings) Group, select Goal Tracking.
4. To enter goals for sales and commissions, select Z1C from the list or select Z1 to enter sales goals.
5. From the Sub-Totals Group, Choose Sales Rep. Then double click on S1 for Sales Rep/Manufacturer/Customer or S3 for Sales Rep/Manufacturer.
6. Select customizing options that you require for this report (i.e. Filter/Range for one manufacturer or sales rep).
7. Set your As-of-Month to be the same as your fiscal year end month and the As-of-Year to be the same as the year you just closed. (Example: Use 12/2006 to print information on the worksheet for 2006 year-end and enter goals for the year 2007).
8. Set the End-of-Year Month field to your fiscal year-end.
9. Print the report.
10. Review and have the sales reps fill out the worksheets.

NOTE: *Manufacturers without prior activity in a territory can be handwritten at the bottom of each sales rep's section in the worksheet.*
11. See FAQ GT-102 on how to enter the goals into dynaMACS 2006.