Sales Period

Module Guide: Sales Period

Module Location

Settings > CRM > Sales Period

Module Purpose

The **Sales Period** module is used to define the time range or accounting period for reporting, analysis, and sales target setting. The goal is to create structured time segments (e.g., monthly, quarterly) so that sales performance can be measured and compared consistently over time.

1. Main View (Sales Period List)

The main page displays all the sales periods that have been defined in the system.

View Explanation

- **Search Filter**: Allows for a quick search based on the period code.
- **List Table**:
  - **No.**: Serial number.
  - **Period Code**: The unique name or code of the period (e.g., APRIL 2011-JULY 2011).

- **Start Date**: The start date of the period.
- **End Date**: The end date of the period.
- **Interval**: The duration of the period in a specific time unit (e.g., 4).
- **Period Type**: The type of time unit used (e.g., MONTHLY).
- **Recurring**: An indicator (Yes/No) that shows whether this period is part of a recurring cycle.

- **Action Buttons**:
  - **New Sales Period**: Opens the form to create a new period.
  - **Delete**: Deletes the selected period.

2. Add Sales Period Page

This form is used to define a new sales period.

View Explanation

- **Period Code**: A field to enter a unique code for the period (required).
- **Period Start Date**: A calendar to select the start date of the period (required).

- **Period End Date**: A calendar to select the end date of the period (required).
- **Interval**: A numeric field to enter the duration of the period.
- **Period Type**: A dropdown to select the time unit (e.g., per Month).
- **Recurring**: A checkbox to mark if this period is recurring.
- **Notes**: An optional field for additional comments.
- **Buttons**:
  - **Save**: To save the new period data.
  - **Cancel**: To cancel the process.

3. Steps to Add a New Sales Period

1. From the main page, click the **New Sales Period** button.
2. Fill in the **Period Code** with a descriptive name (e.g., Q4 2025).
3. Select the **Period Start Date** and **Period End Date**.
4. Enter the **Interval** and select the appropriate **Period Type** (e.g., `3` and `per Month` for one quarter).
5. Check **Recurring** if this is part of a regular cycle (e.g., a monthly period).

6. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Basis for Sales Reporting**: All sales performance reports will use the periods defined here as the main time filter. This allows management to view revenue, deal count, or team performance within specific time ranges (e.g., "sales in January 2025").

- **Target Setting (Sales Target/Quota)**: Sales periods form the basis for setting targets. Management can set sales targets per individual or per team for a period like "Q1 2026".

- **Trend Analysis**: With structured periods, the company can analyze sales trends from period to period (e.g., comparing sales in Q1 2024 with Q1 2025).

- **Commission Calculation**: These periods are often used as the basis for calculating commissions or sales incentives for the sales team.

5. Tips & Important Notes

- Ensure there is no overlap between periods to avoid ambiguity in reporting.

- Use a consistent **Period Code** scheme, such as `[MONTH]-[YEAR]` or `Q[QUARTER NUMBER]-[YEAR]`.

- The **Recurring** feature is useful for marking standard periods (like monthly or yearly) that will continue to be used in the

future.

Revision #1
Created 23 October 2025 13:33:05 by Sayu
Updated 23 October 2025 13:34:43 by Sayu