Sales Stage Target Percentage

Module Guide: Sales Stage Target Percentage

Module Location

CRM > Sales Stage Target Percentage

Module Objective

The **Sales Stage Target Percentage** module functions as a configuration tool to set the target distribution of opportunities across each **sales stage** for individual **salespersons (Account Officers)**. The goal is to ensure each salesperson has a healthy and balanced sales pipeline, preventing opportunities from just piling up in the initial or final stages.

1. Main View (Target List)

The main page of this module displays a list of the target settings that have been created for each Account Officer.



View Explanation

This page is for viewing and managing all existing target percentage settings.

- **Filter**: You can search for the settings for a specific Account Officer using the search bar.

- **Settings List**: The table below displays the Account Officer and a summary of the Sales Stage Target Percentage that has been configured for them.

Button Functions

- **New**: The primary button to create new target percentage settings for an Account Officer.

2. Steps to Set the Target Percentage

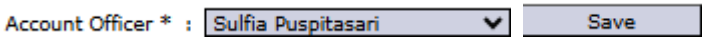
The following is the workflow for setting a new target percentage.

Step 1: Create New Settings

From the Main View, click the **New** button to open the **New Sales Stage Target** form. 

Step 2: Select the Account Officer

On the form that appears, select the name of the **Account Officer** (salesperson) from the dropdown whose target you want to set. This field is mandatory `(*)`. After selecting, click **Save**.



Step 3: Fill in the Percentage per Stage

After saving in Step 2, the system will display the next page (not shown in the image) where you can enter the target percentage for each sales stage that exists in the system. Example entry:

- Prospecting: 20%
- Qualification: 30%

- Proposal: 40%
- Negotiation: 10%

Workflow & Integrated Business Process

The percentage settings you define here will become the benchmark in the **CRM > Target vs Actual Sales Stages** report to compare the actual pipeline composition of each salesperson against their target composition.

Tips & Important Notes

- Ensure the total percentage of all sales stages for one Account Officer adds up to **100%**.
- This module is a **strategic tool for Sales Managers** to guide their teams in managing the pipeline so it doesn't get stuck in just one stage, thus ensuring a smoother sales flow.
- These settings focus on the **distribution of opportunities**, not on their monetary value.

Revision #2
Created 1 August 2025 09:23:54 by Sayu
Updated 1 August 2025 13:27:07 by Sayu