Sales Target Inbox

Module Guide: Sales Target Inbox

Module Location

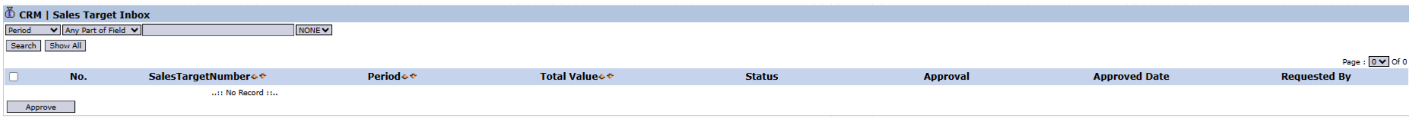
CRM > Sales Target > Sales Target Inbox

Module Objective

The **Sales Target Inbox** module functions as the approval center for all **Sales Target** documents that have been submitted. This module is used by managers or leaders who are authorized to review and provide final approval for the set targets before they become the official performance benchmark.

1. Main View (Target List)

The main page of this module is an "inbox" that displays all Sales Target documents requiring your action.



View Explanation

This page provides a summary of all sales targets that are awaiting approval.

- **Filters**: You can search for a specific target by **Period** or other keywords.
- **Request List**: The table below will display all targets awaiting action. The table currently shows "...No Record...".

Column Explanation

- **SalesTargetNumber**: The unique number of the submitted Sales Target document.
- **Period**: The time period covered by the target.
- **Total Value**: The total value of the submitted target.
- **Status**: An icon indicating the current status of the document.
- **Approval**: An icon indicating the status of the approval process.
- **Approved Date**: The date when the approval was given.
- **Requested By**: The name of the user or employee who submitted the target.

Button Functions

- **Approve**: The main action button to approve one or more selected sales targets.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Sales Target Inbox** module to see the list of targets that require approval.

Step 2: Review Target Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the details that have been input, such as monthly targets or targets per product.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted target:

1. Return to the main **Inbox** page.
2. Check the box on the left of one or more target rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

This module is part of a structured target-setting process.

1. **Submission**: A user (e.g., a sales team lead) creates a target in the **Sales Target** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed target automatically enters the queue in this **Sales Target Inbox** module.
3. **Review & Approval**: A manager or sales director opens this module, reviews, and provides approval.
4. **Target Activation**: After approval, the target becomes active and is officially used as the benchmark in performance comparison reports.

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