

Quota versus Actual

Well run sales organizations want to manage their sales people using quotas. A new series of pages are now available that work within Synergy with Synergy and MAX data to dynamically present quota versus actual sales in a start page (home page) that provides a concise report of how sales are going.

The following sample start (home) page provide quota versus actual data for the Boston Direct Sales Manager and provide start page links to other Synergy functions like a normal start page.

It dynamically determines the territory, quota and MAX invoice values based on the login user identity.

The screenshot displays a web application interface with a top navigation bar containing icons for Financial, Project, Customers, Marketing, HRM, Workflow, and Documents. Below this is a secondary bar with 'Entry', 'Search', 'News', 'Organization', and 'Reports' options. The main content area features a 'Select Territory' dropdown menu set to 'Boston DSM' and a 'Submit' button. Below the menu is a table showing sales performance by quarter and year-to-date (YTD).

Quarters	QTD Quota	QTD Sales	%	YTD Quota	YTD Sales	%
Q1	\$0	\$0	0.0%	\$0	\$0	0.0%
Q2	\$0	\$0	0.0%	\$0	\$0	0.0%
Q3	\$5,000	\$3,500	70.0%	\$5,000	\$3,500	70.0%
Q4	\$10,000	\$16,000	160.0%	\$15,000	\$19,500	130.0%

Below the sales table is a navigation menu with five columns: Locate, Stats, Reports, Searches, and Other. Each column contains a list of links to various application features.

Locate	Stats	Reports	Searches	Other
Prospect Accounts	Prospect Accounts	Prospect Accounts	Accounts	Sales Collateral
Evaluation Cycles	Evaluation Cycles	Evaluation Cycles	Requests	Sales Policies
Conversion Cycles	Conversion Cycles	Conversion Cycles	Documents	Synergy Navigation
Active Customers	Active Customers	Active Customers	Resources	Synergy Training

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Other pages are available to maintain quota data as shown below:

View Quota Data						
Select Year		Submit		Add New Quota		
Year	Territory	Q1	Q2	Q3	Q4	
2008	Atlanta Director	\$0	\$0	\$5,000	\$10,000	
2008	Boston DSM	\$0	\$0	\$5,000	\$10,000	
2008	Chicago DSM	\$0	\$0	\$5,000	\$10,000	
2008	Cleveland DSM	\$0	\$0	\$5,000	\$10,000	
2008	Jacksonville DSM	\$0	\$0	\$5,000	\$10,000	
2008	Los Angeles DSM	\$0	\$0	\$5,000	\$10,000	
2008	Memphis DSM	\$0	\$0	\$5,000	\$10,000	
2008	Miami DSM	\$0	\$0	\$5,000	\$10,000	
2008	New York DSM	\$0	\$0	\$5,000	\$10,000	
2008	Phoenix DSM	\$0	\$0	\$5,000	\$10,000	
2008	SanFrancisco DSM	\$0	\$0	\$5,000	\$10,000	
2008	St Louis DSM	\$0	\$0	\$5,000	\$10,000	
2008	Texas DSM	\$0	\$0	\$5,000	\$10,000	
2008	VP, Sales	\$0	\$0	\$5,000	\$10,000	
2008	Wash DC DSM	\$0	\$0	\$5,000	\$10,000	
Totals [Count = 15]		\$0	\$0	\$75,000	\$150,000	

Edit Quota Data	
<input type="button" value="Save"/>	
Field	Value
Year	2008
Region	NA
Territory	Boston DSM
Synergy User	Jay Turchinetz
Q1 Quota	0
Q2 Quota	0
Q3 Quota	5000
Q4 Quota	10000
End-User ID:	00,000,028 - Sales Start Page New Format (Embedded)

Contact your Exact Account Manager or contact PlusPointDevelopment.Com directly for more information on how you can leverage custom pages to leverage your investment in MAX and Synergy.