

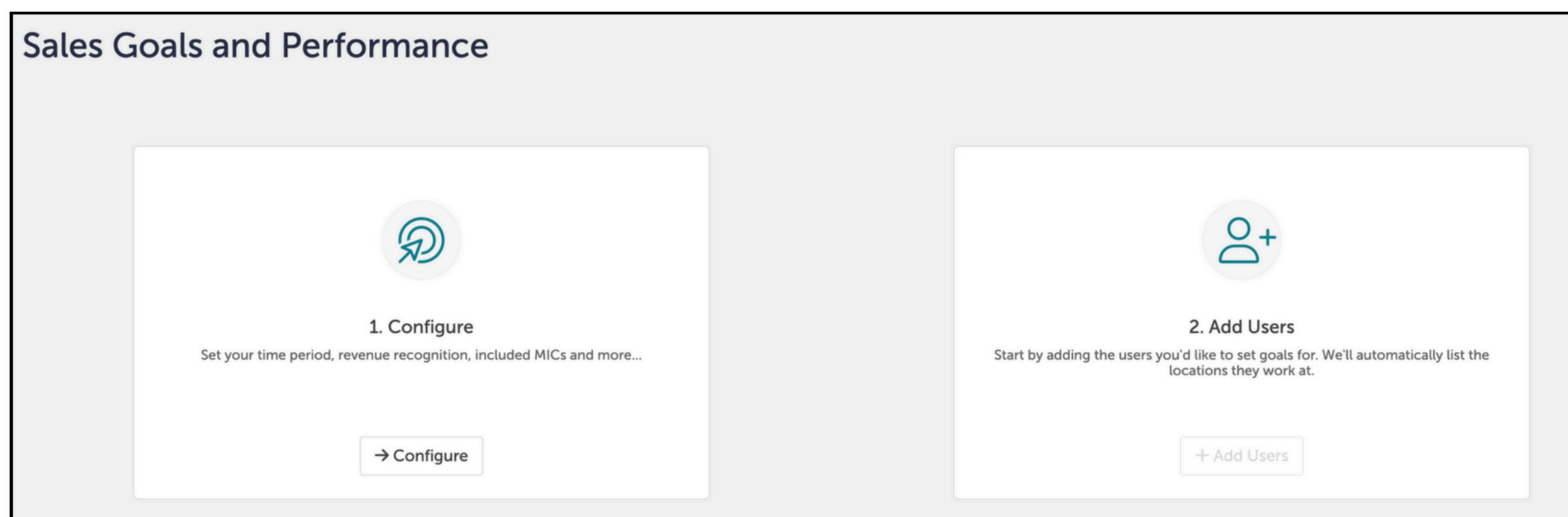
Build Smarter Benchmarks by Setting Up Hotel Sales Goals

Use Sales Goals to set revenue targets by user or location, choose how revenue is recognized, include Guest Room sales and Guest Room night goals and track performance against those goals. Goals help your team stay aligned, measure success, and identify opportunities for growth. Follow the steps below to set up sales goals for the first time.

Note: Only users with Settings access can view, create, and edit Sales Goals.

1. Configure Sales Goals

[Settings](#) > [Sales Performance Goals and Reporting](#)



• Selecting → **Configure**, you will select how your group will measure and track goals. Select:

- **Time Period**
 - Weekly
 - Monthly
 - Quarterly
 - Fiscal Period (if you have these set up)
- **Goal Type**
 - User Goals per Location → set goals per user, per location.
 - Overall User Goals → one total goal per user.
- **Recognized Revenue**
 - By Event Date (when the event happens).
 - By Definite Date (when the event becomes definite).
- **Counted Towards Goal**
 - Event Actuals
 - Custom Menu Item Categories
 - Optional Guest Room Inclusion

Note: Changes to these selections in the future may change goals.

2. Add Users

Once you have set configurations, the + **Add Users** button is available.

- Select + **Add Users** to choose from a list of users
- Select users and click **Save**.

Configure

Time Period ⓘ
Quarterly

Goal Type ⓘ
 User Goals Per Location Overall User Goals
⚠ Changing this setting will clear any existing goals

Recognized Revenue
 Event Date Definite Date

Counted Toward Goal
 Include guest room revenue ⓘ
 Event Actual Customize

Menu Item Categories (select all)
 Food Beverage
 Audio/Visual Room Rental
 Labor Meeting Packages

> Show deleted Categories

Cancel Save

3. Add Goals

- Enter goals by filling in any of the blank spaces.
- Select **Save Changes** when done or before navigating to another page.

The screenshot shows the 'Goals Progress Report' for 'Overall User Goals' for the year 2026, weeks W37-W42. It features summary cards for Overall performance (2990%), Users Hit Target (100%), and Top User (James D). Below is a table with columns for weeks and rows for goal types: Event Sales, Guest Room Sales, and Guest Room Nights. The 'Event Sales' row is highlighted in teal, showing a value of \$8,000 for each week. A 'Save Changes' button is visible at the bottom right.

Pro-Tip: Speed up sales goals with **autofill**. Add a number in the first editable column and it will automatically fill all future empty cells on that page.

- It works one page at a time and will not overwrite existing numbers.

Note: If you set up **User Goals per Location**, you will have access to both views. Toggle between views by clicking the Location/User icon buttons to the left of Filters.

- View by User — see each user across locations.
- View by Location — see each location with assigned users.
- Select into an individual user OR location to enter/edit numbers

This screenshot shows the 'User Goals' interface for user James D in 2025. A teal arrow points to a location/user icon button in the top right corner. Below, a secondary window shows the 'View by Location' view for James D, displaying a table with columns for weeks and rows for 'Overall', 'Event Sales', and 'Guest Room Sales' for 'Bluewater Hotel North'. The 'Overall' row shows a goal of \$22,750.00 for week W39.

Continue to: [Manage Success with Hotel Sales Goals](#)

This guide will walk you through viewing, editing, and reporting on sales goals.

🔗 Need a visual walkthrough?

Check out our [Hotel Sales Goals video](#) for a tour of the feature in action.