

Manage Success with Hotel Sales Goals

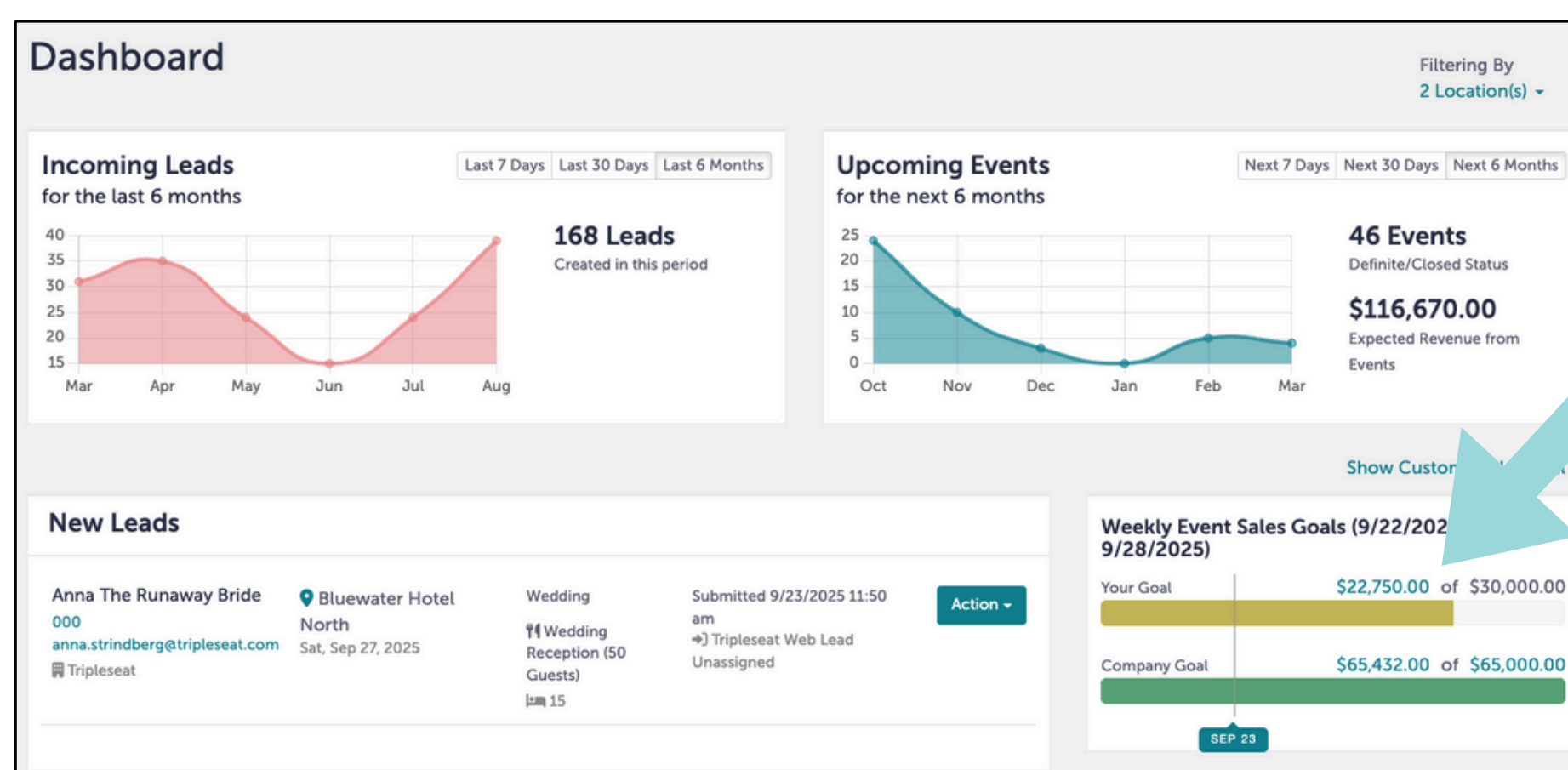
Sales Goals aren't static—they're designed to be managed and adjusted as your business evolves. In this crash course, you'll learn how to view goals at the user and location levels, and edit targets when changes are needed. For setup guidance, see [Build Smarter Benchmarks with Hotel Sales Goals](#).

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

Viewing Sales Goals

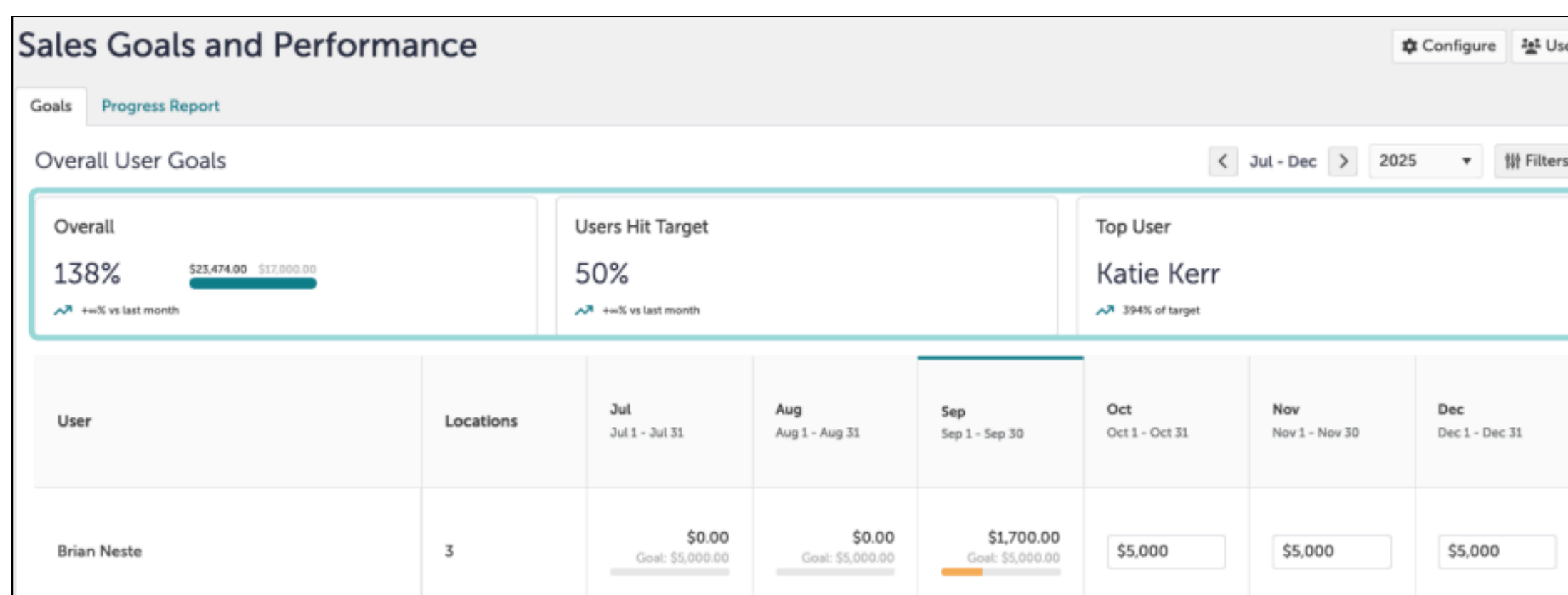
Dashboard

- View your individual Sales Goals on the Tripleseat dashboard
 - Admin users will be able to see the company total, which is the combined total Sales Goals for all users across all locations in the group.
- For more information on Sales Goals, click on the Goal Number to be directed to an Event Details report that shows all the events contributing to that goal.



Settings > Sales Performance Goals and Reporting

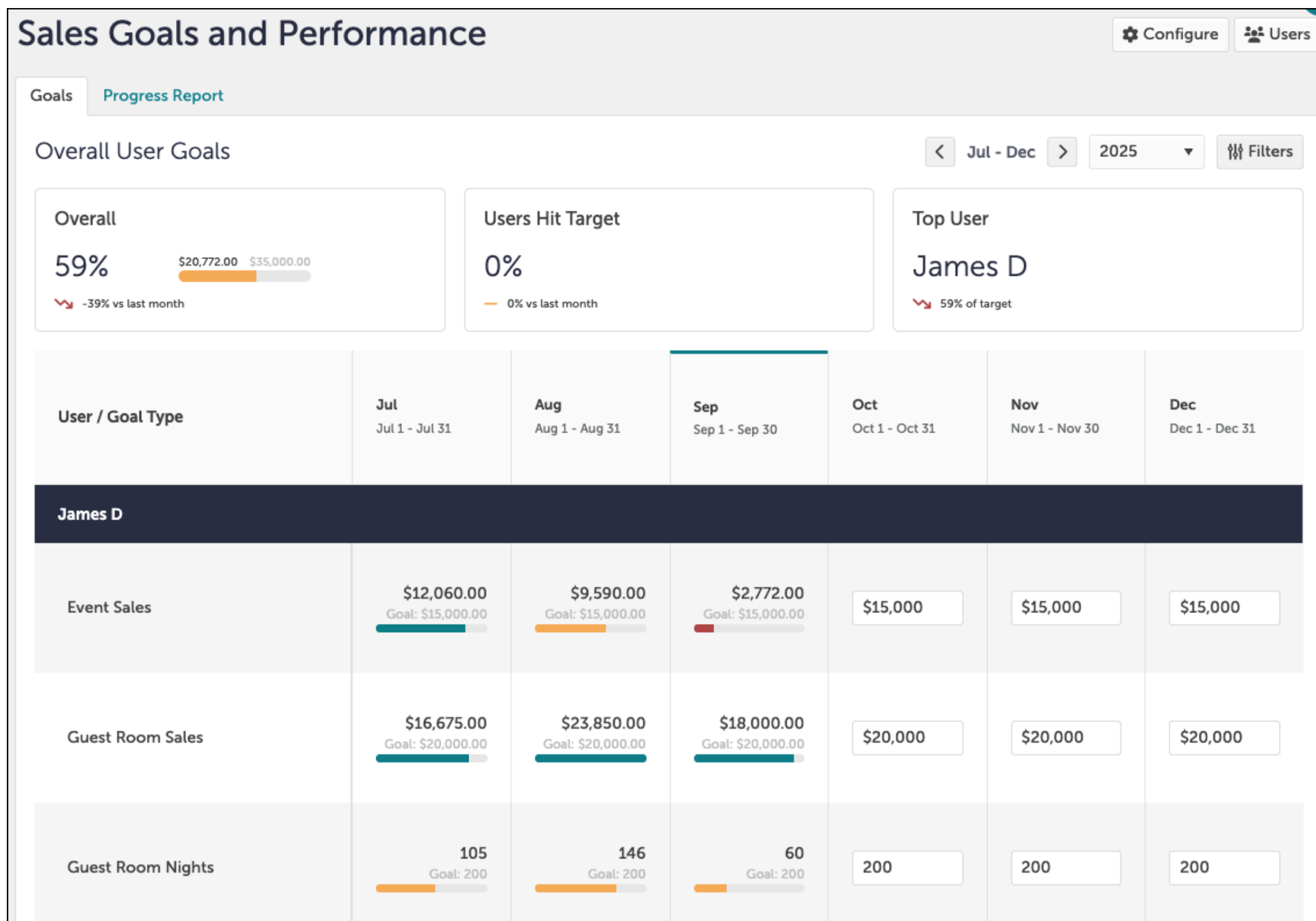
- Use widgets for a quick view of metrics.
 - If using Overall User Goals – see all users on a single page.
 - If using User Goals per Location, use the toggle to switch views:
 - View by User — see each user across locations.
 - View by Location — see each location with assigned users.



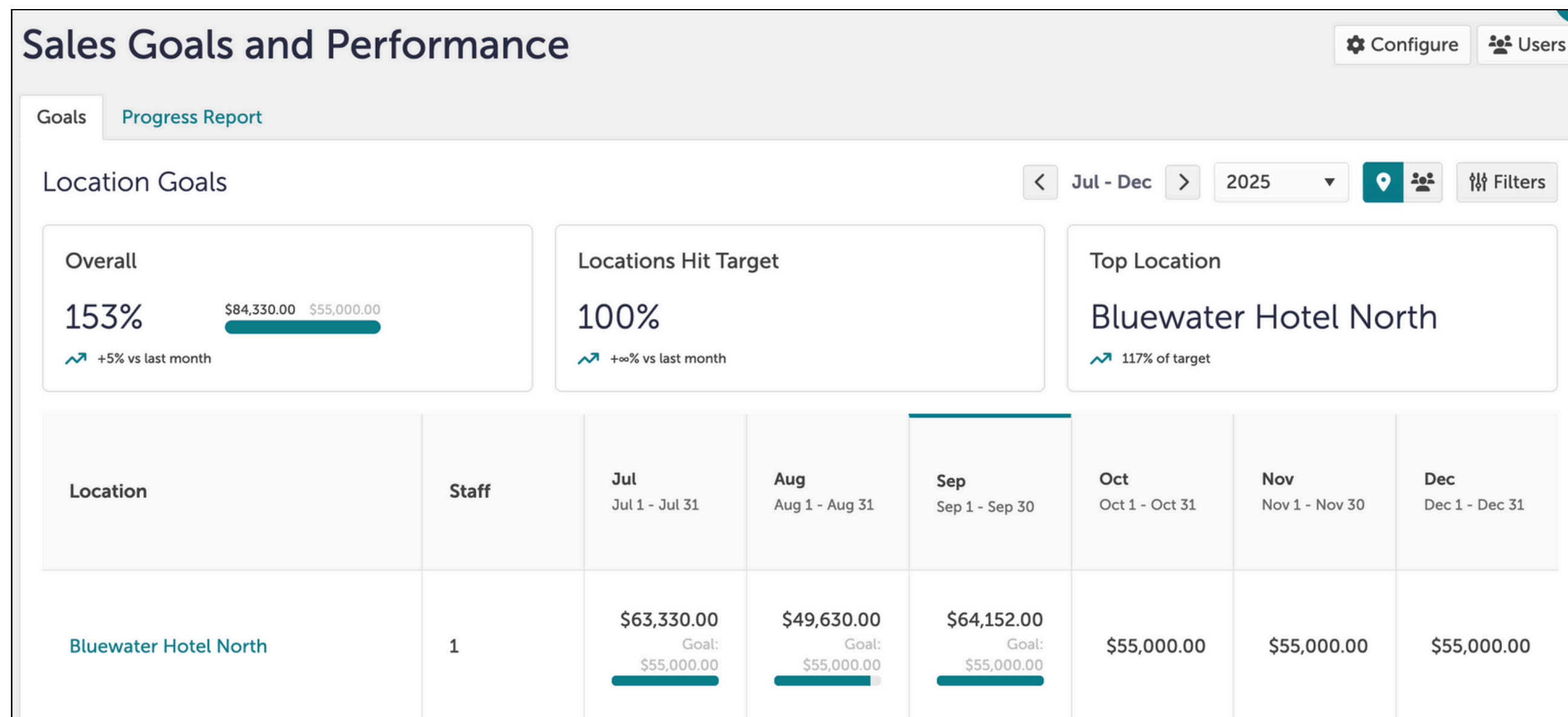
The 'Sales Goals and Performance' report displays overall user goals and a detailed table of performance. The overall progress is 138% (\$23,474.00 of \$17,000.00). The 'Users Hit Target' is 50%. The 'Top User' is Katie Kerr, who is 394% of target. The table below shows performance for Brian Neste across various months.

User	Locations	Jul Jul 1 - Jul 31	Aug Aug 1 - Aug 31	Sep Sep 1 - Sep 30	Oct Oct 1 - Oct 31	Nov Nov 1 - Nov 30	Dec Dec 1 - Dec 31
Brian Neste	3	\$0.00 Goal: \$5,000.00	\$0.00 Goal: \$5,000.00	\$1,700.00 Goal: \$5,000.00	\$5,000	\$5,000	\$5,000

User View



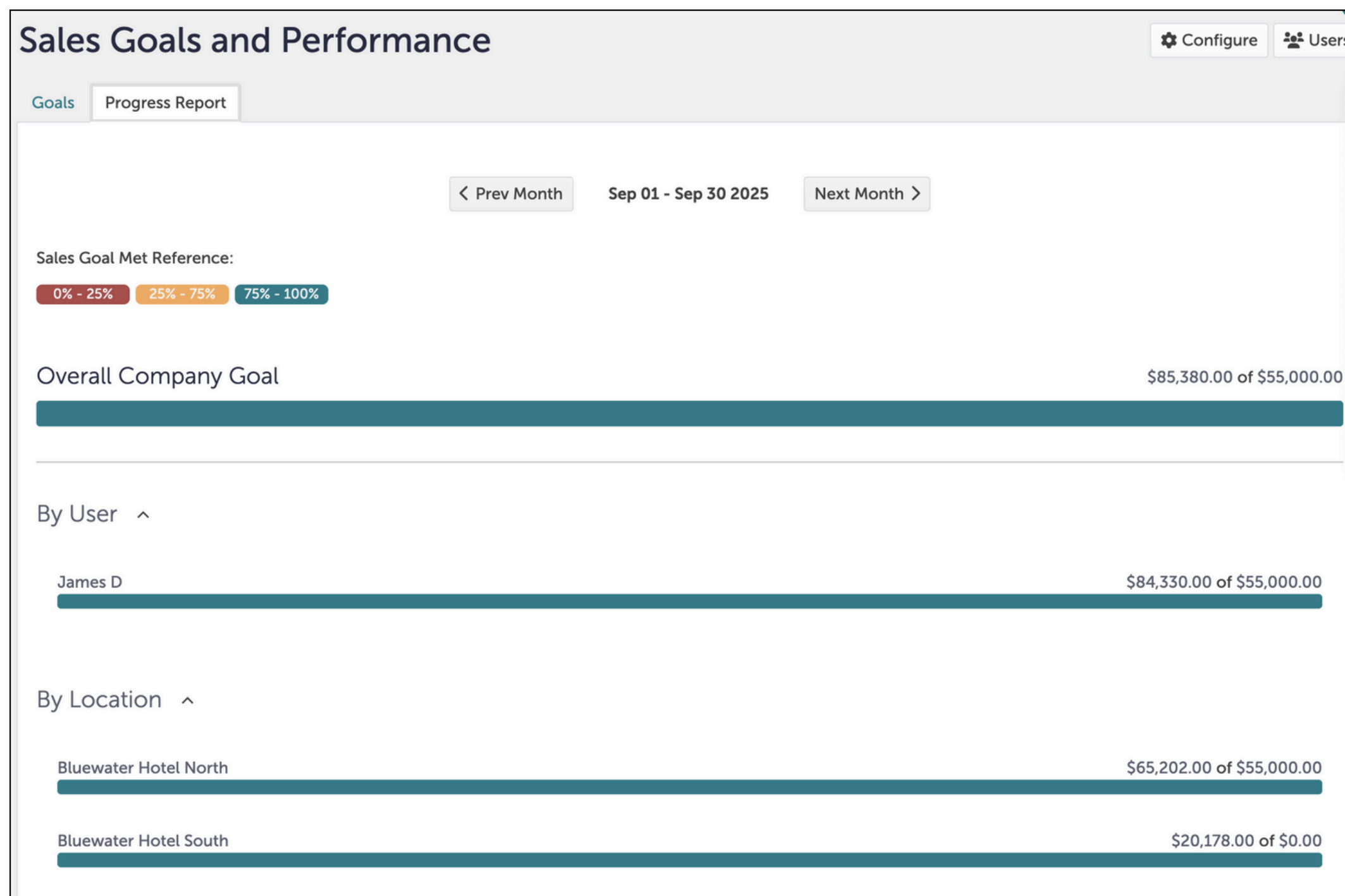
Location View



Tracking Progress

Settings > Sales Performance Goals and Reporting > Progress Report Tab

- View overall company goal at the top with collapsible By User and By Location views (only with User Goals per Location type).
 - The Overall Company Goal and Location Goal will include all event revenue from all users - not just the users with sales goals set up.



Editing and Adjusting Goals

To edit individual users or locations:

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

Pro-Tip: Enter or adjust past period goals by clicking into those spaces, and the field will become editable. Remember to save changes when done

User	Locations	Jul Jul 1 - Jul 31	Jul Jul 1 - Jul 31
Brian Neste	3	\$0.00 Goal: \$0.00	\$5,000

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.

To adjust configurations:

- Select Configuration in the top-right corner
- Make changes to Time Period, Goal Type, Recognized Revenue Date, and what Counts Towards Goal.

Configure

Time Period i

Quarterly ▼

Goal Type i

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 i

Event Actual
 Customize

Menu Item Categories (select all)

Food
 Beverage

Audio/Visual
 Room Rental

Labor
 Meeting Packages

> Show deleted Categories

Note: If you make any changes to the configurations:

- Changing the Goal Type from Overall User Goals to User Goals per Location clears existing goals.
- Changing the Goal Type from User Goals per Location to Overall User Goals combines all goals into one per user.
- Changing the time period will redistribute goals automatically across the new timeframe

Need a visual walkthrough?

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