

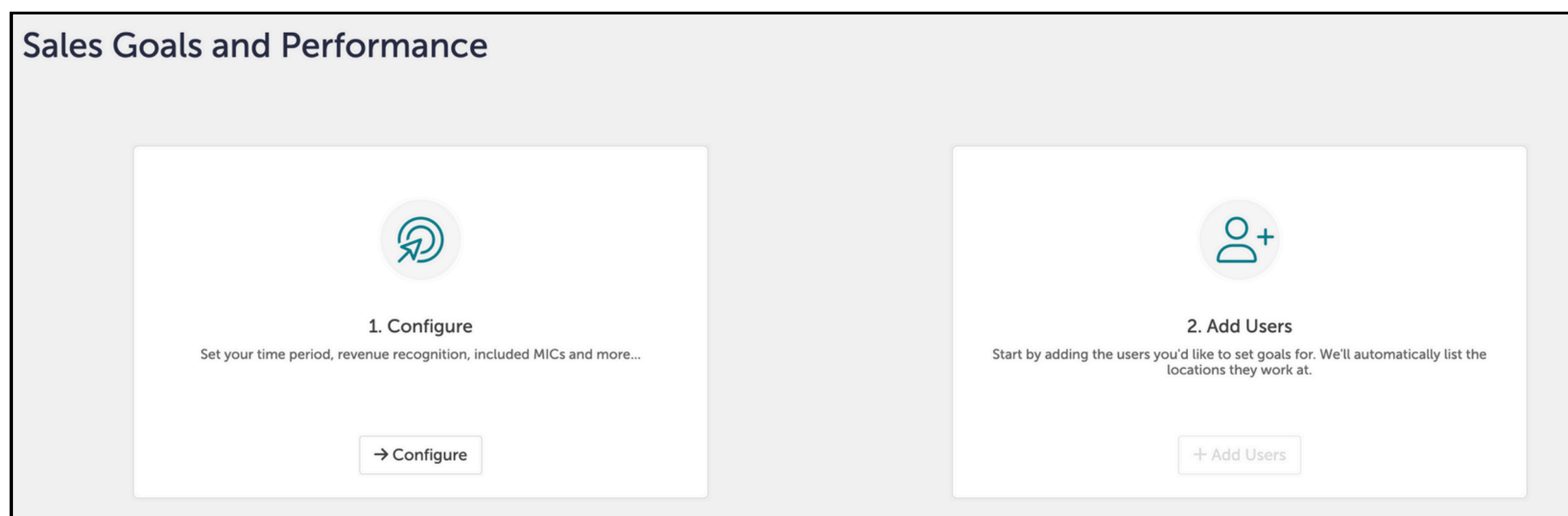
# Build Smarter Benchmarks by Setting Up Sales Goals

Use Sales Goals to set revenue targets by user or location, choose how revenue is recognized, 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.

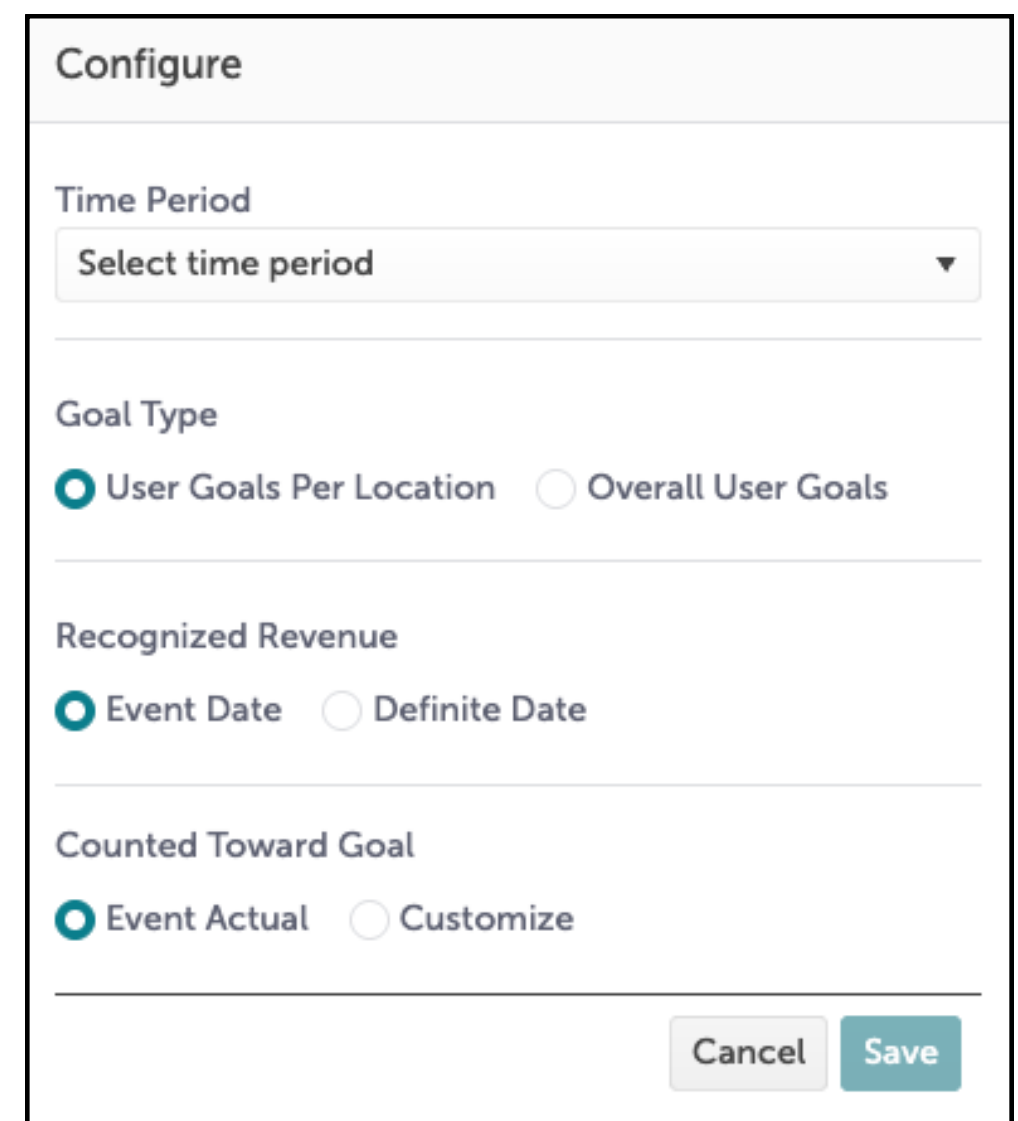
**Note:** Only users with Settings access can view, create, and edit Sales Goals.

## 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



**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**.

### 3. Add Goals

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

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
Ryan Atwood	3	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Seth Cohen	2	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Summer Roberts	3	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000

**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

Location	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
Overall	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$5,000.00	\$5,000.00	\$5,000.00
Lakeview Grill	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$1,000	\$1,000	\$1,000
Lakeview Portland	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$2,500	\$2,500	\$2,500
Lakeview Restaurant	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$0.00 Goal: \$0.00	\$1,500	\$1,500	\$1,500

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

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