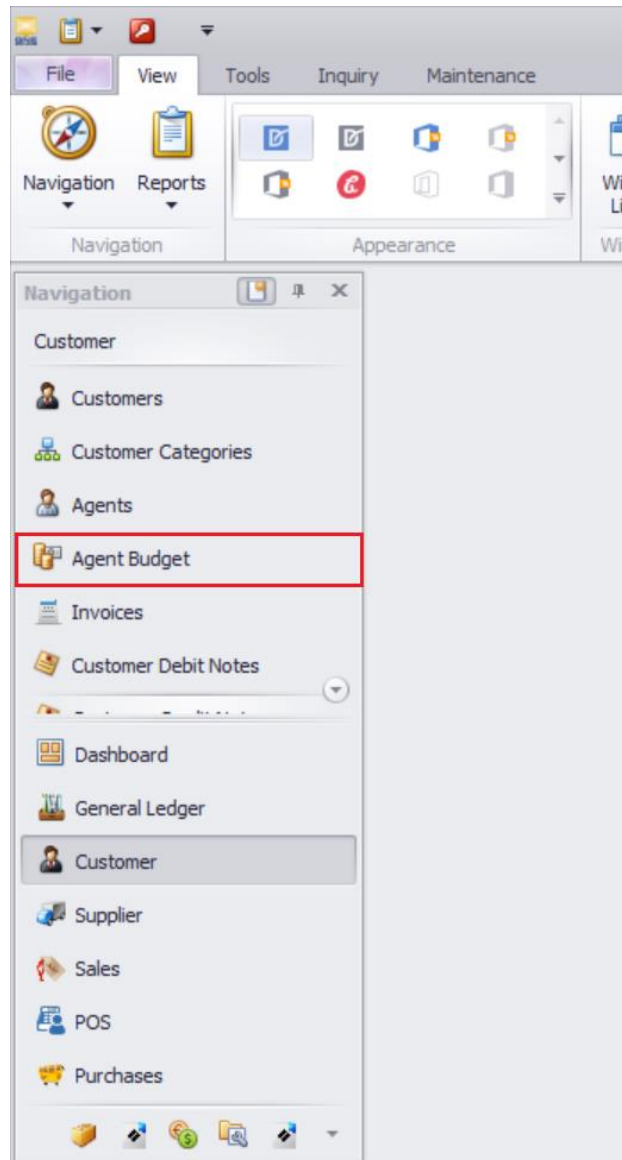




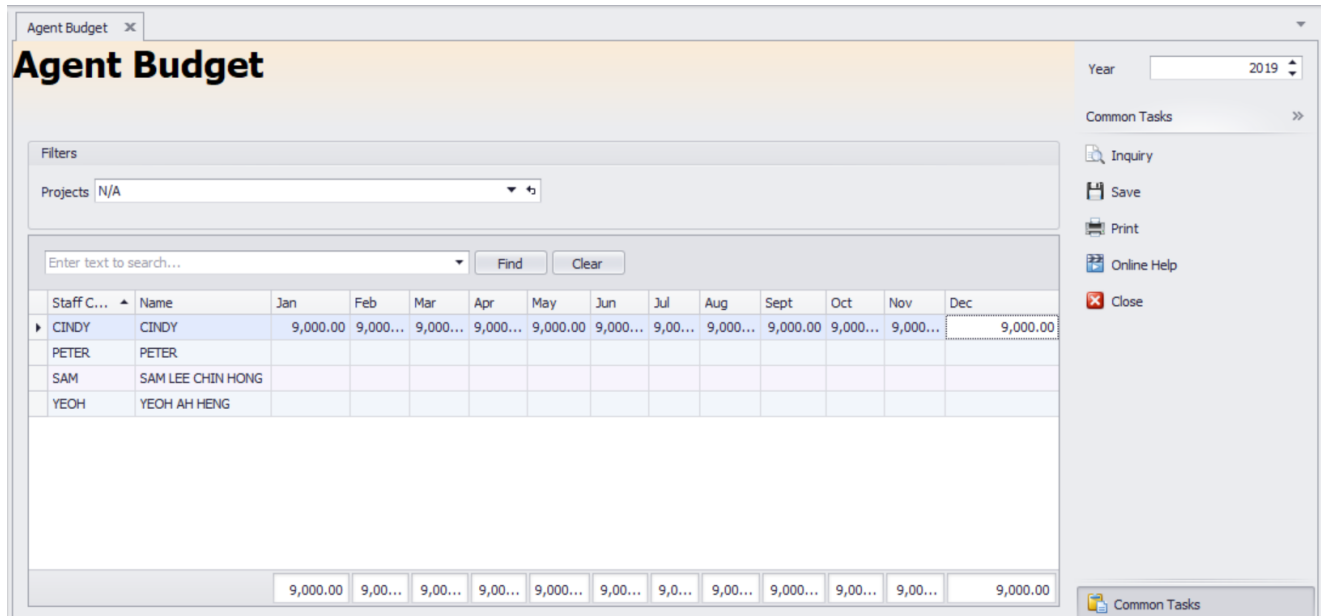
## HOW TO SET A QUOTA TO AGENT OR SALES PERSON

In System, there is a feature called **Agent Budget** whereas this function is useful for setting up a quota for the Agent or Sales Person.

In Navigation Pane, under Customer > Agent Budget



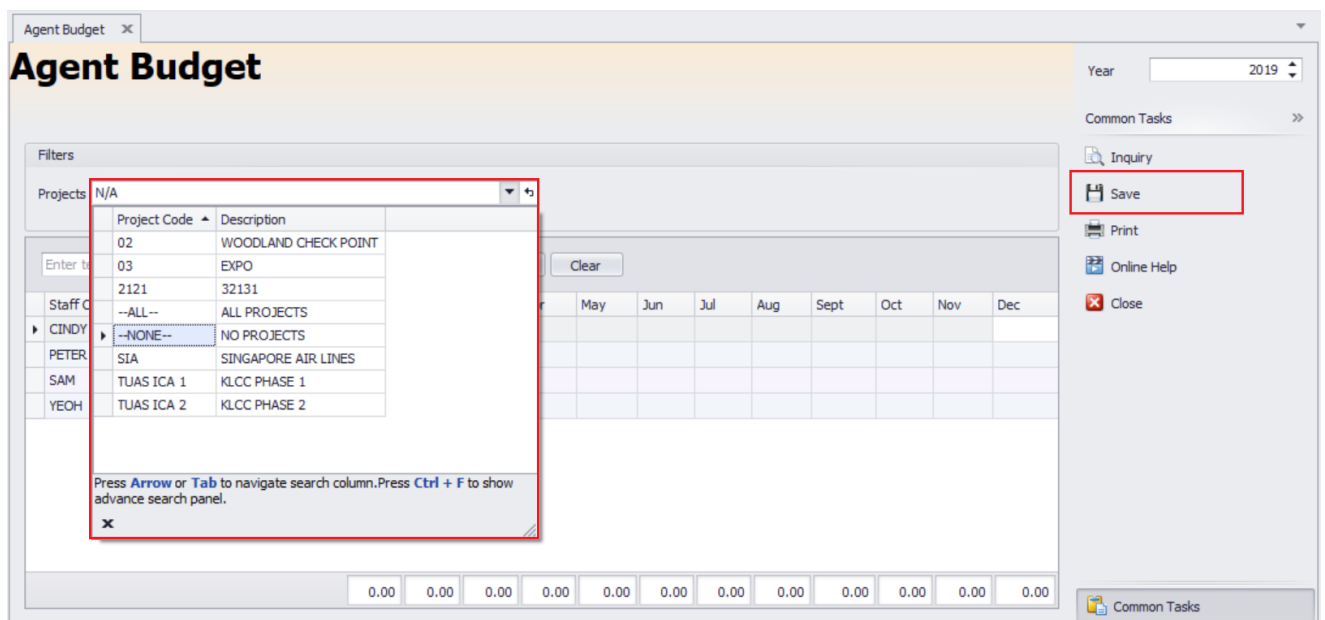
In the Agent Budget, it will list all the **Agents** that was maintained in *Agent Maintenance*. The user can set the Agent Budget per month and can plot the monthly quota for the whole year.



The screenshot shows the 'Agent Budget' window. The 'Projects' filter is set to 'N/A'. The table displays budget data for four staff members: CINDY, PETER, SAM, and YEOH. The columns represent months from Jan to Dec. The total budget for each staff member is 9,000.00.

Staff C...	Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
CINDY	CINDY	9,000.00	9,000...	9,000...	9,000...	9,000.00	9,000...	9,000...	9,000...	9,000.00	9,000...	9,000...	9,000.00
PETER	PETER												
SAM	SAM LEE CHIN HONG												
YEOH	YEOH AH HENG												
		9,000.00	9,00...	9,00...	9,00...	9,000...	9,00...	9,0...	9,00...	9,000...	9,00...	9,00...	9,000.00

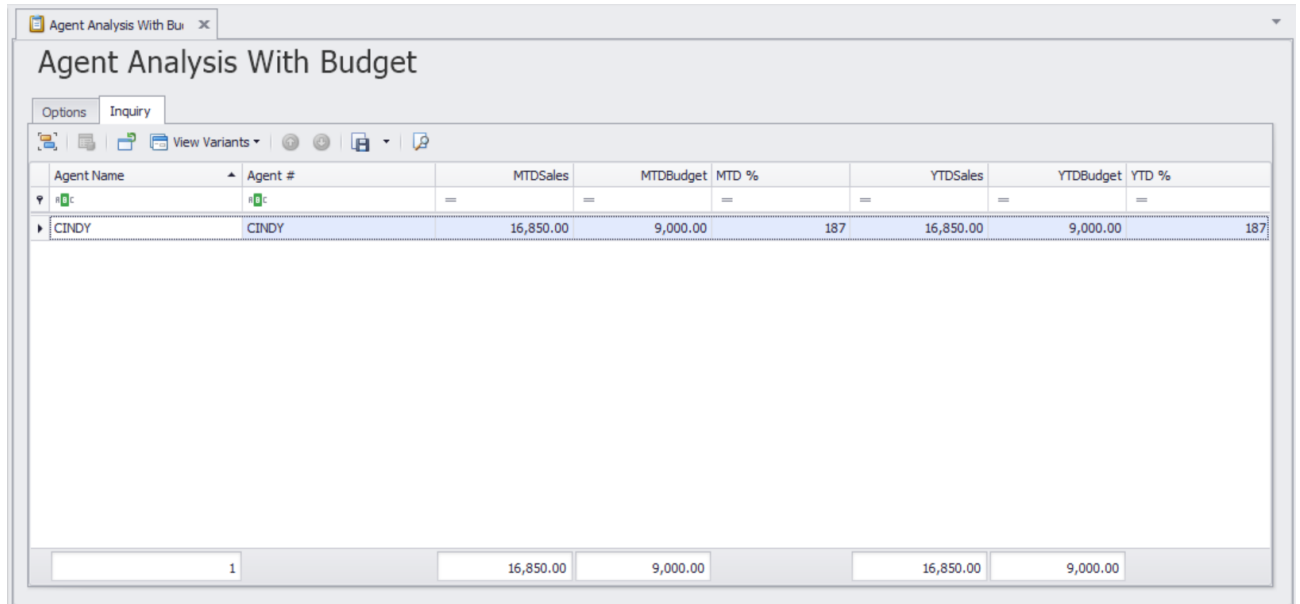
In addition, the user can set the Agent Budget per *Project* and is useful for the filtering of reports. By doing so, the user can select the Project using the drop-down Option in the *Projects* Field. Once all the necessary fields have been filled, the user can **Save**.



The screenshot shows the 'Agent Budget' window with the 'Projects' dropdown menu open. The menu lists several project options, including 'WOODLAND CHECK POINT', 'EXPO', 'SINGAPORE AIR LINES', and 'KLCC PHASE 1' and '2'. The 'Save' button in the 'Common Tasks' panel is highlighted with a red box.

Project Code	Description
02	WOODLAND CHECK POINT
03	EXPO
2121	32131
--ALL--	ALL PROJECTS
--NONE--	NO PROJECTS
SIA	SINGAPORE AIR LINES
TUAS ICA 1	KLCC PHASE 1
TUAS ICA 2	KLCC PHASE 2

Also, the report **Agent Analysis with Budget** can be used to check if the quota of the Agent has been reached.



Agent Name	Agent #	MTDSales	MTDBudget	MTD %	YTD Sales	YTD Budget	YTD %
CINDY	CINDY	16,850.00	9,000.00	187	16,850.00	9,000.00	187