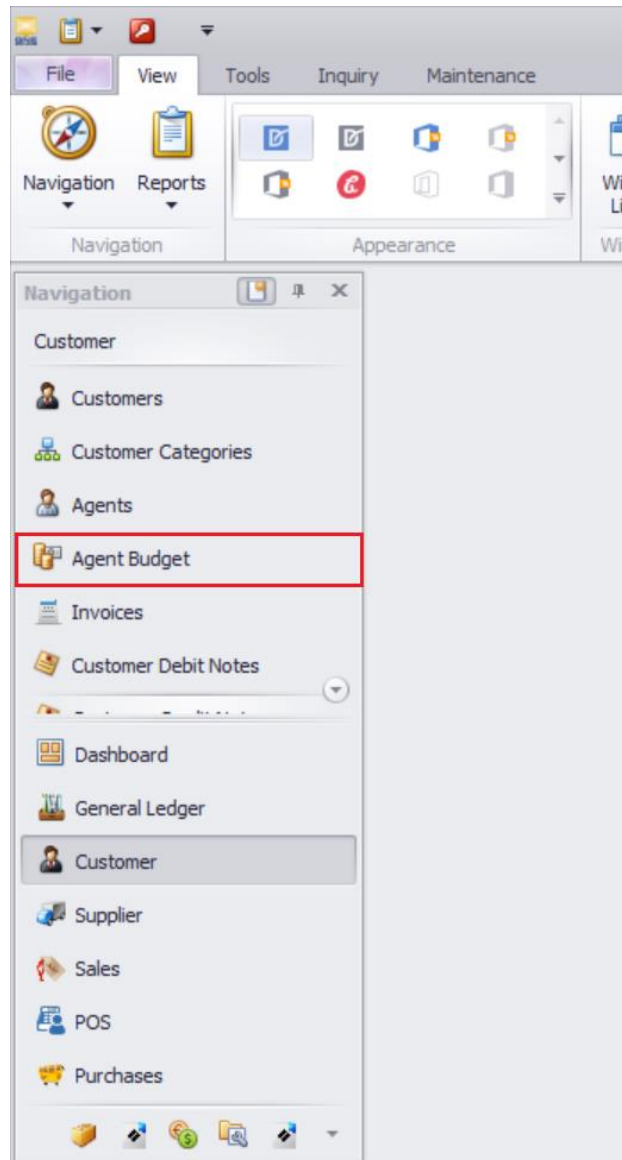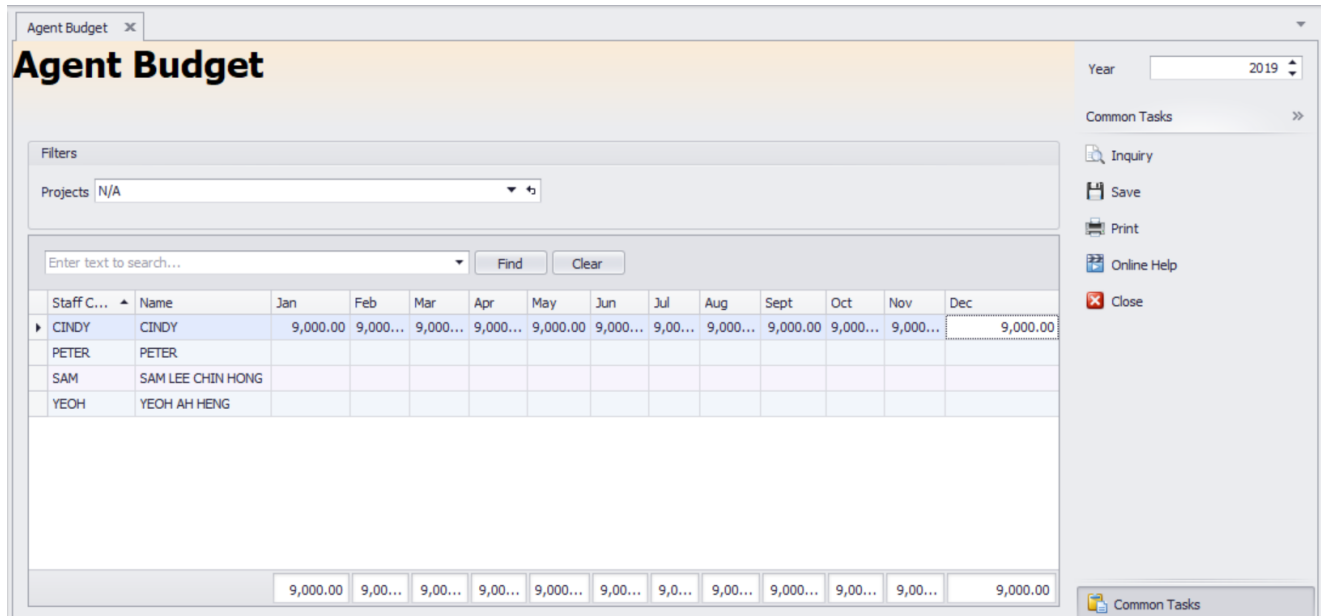# HOW TO SET A QUOTA TO AGENT OR SALES PERSON

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.
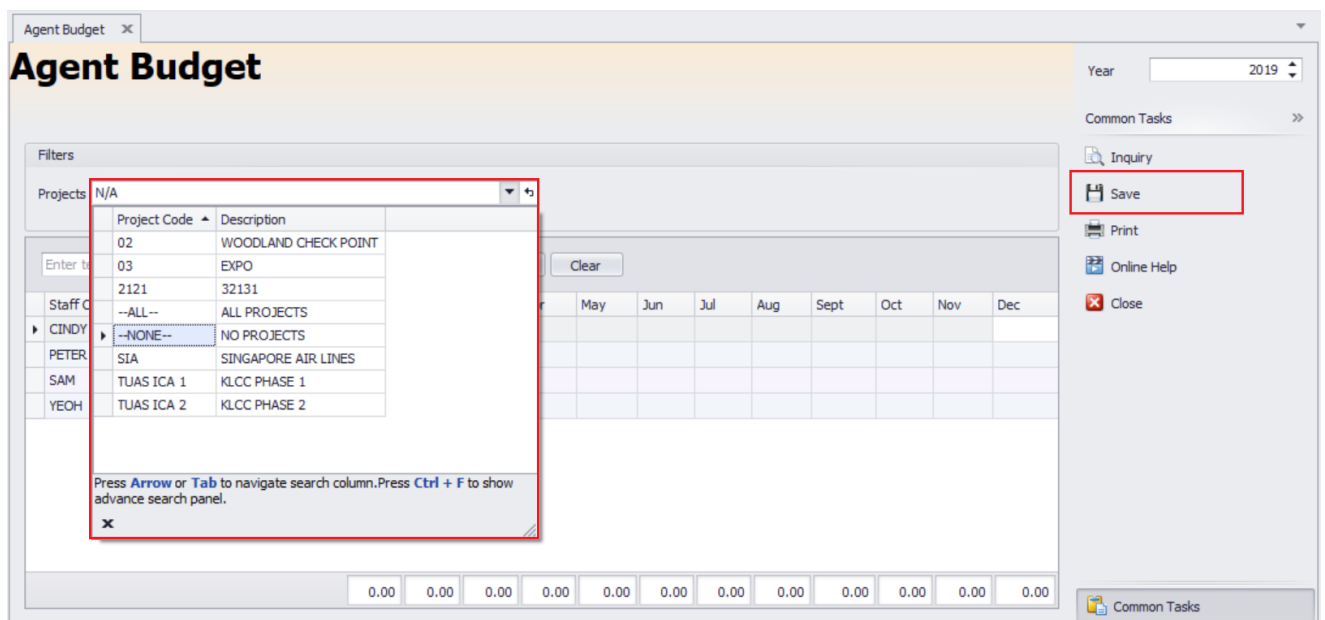
In Navigation Pane, under Customer > Agent Budget

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.
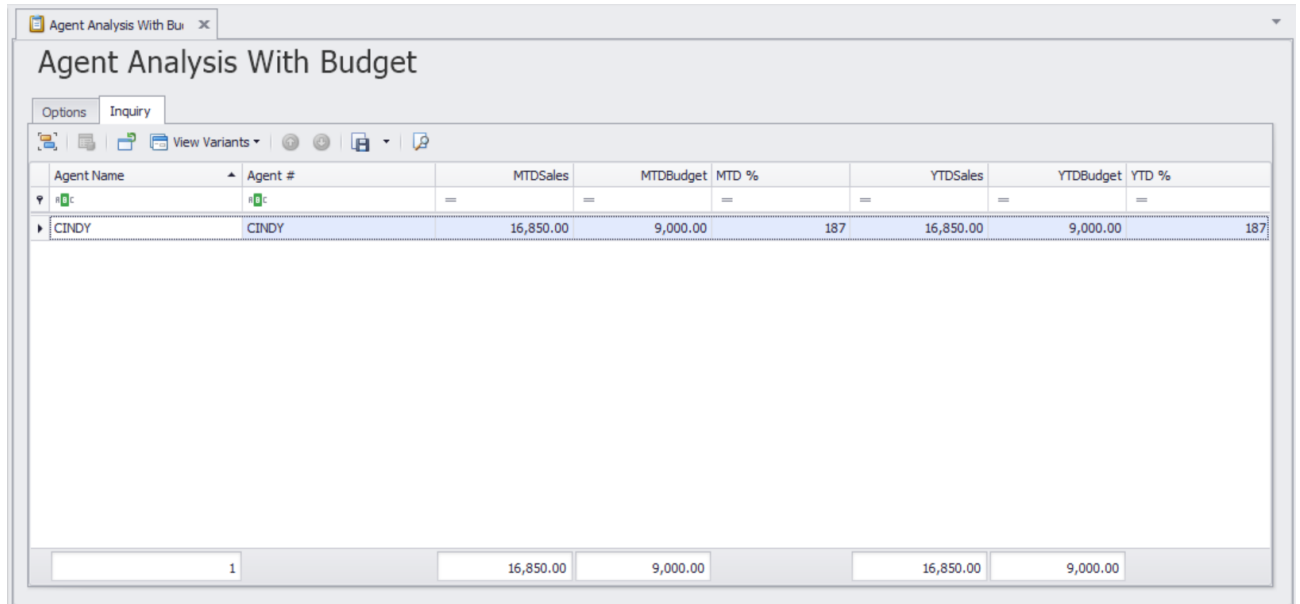

In addition, the user can set the Agent Budget per *Project* and is useful for the filtering of reports. By doing so, the user can select the Project using the drop-down Option in the *Projects Field*. Once all the necessary fields have been filled, the user can *Save*.

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