Data collection - Target agreement

Create the Target agreement in the backend under Order support / Data collection / Target agreement.

You have the option to download an Excel file and upload it again after filling it out.

You can create individual records via the "Add Target agreement" button.

With pseudo-customers for your sales reps, you set per month how much turnover the Sales rep. must achieve.

You can also store the Target agreement at the customer level, then you specify how much the customer must have reached in which month.

The Target agreements can be found again in the client on the Target/Actual widget.

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