

FISCAL YEAR SETTINGS & QUOTAS

Fiscal year settings must be defined in Microsoft CRM prior to setting and using the Sales Quota functionality. Sales Quotas provide productivity information for the sales force. Use this information when measuring the progress of the sales force against the quotas that have been set for them, their managers, and the territories in which they are divided.

NOTE: You can set the Fiscal Period options only once. The settings CANNOT be edited after they have been set; ensure period parameters are correct before saving the screen.

1 & 2 – Setting the Fiscal Period

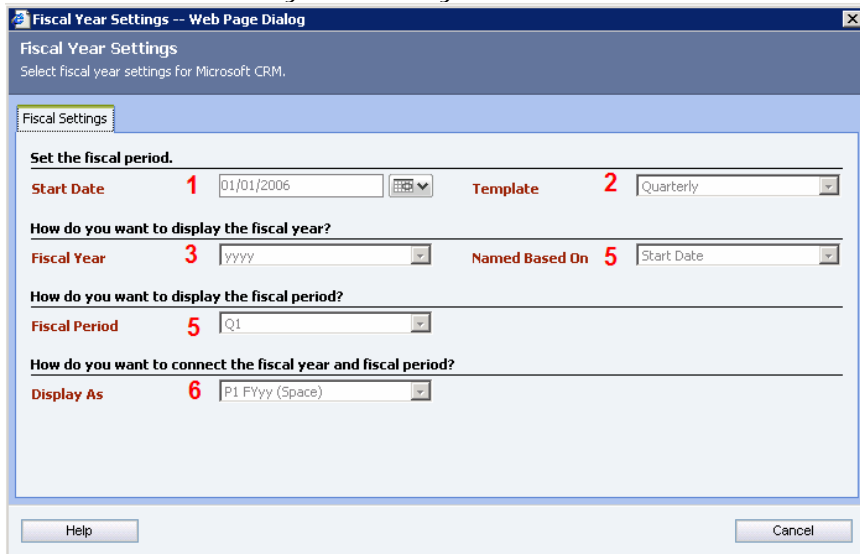
Start Date refers to the first day of your present Fiscal Year.

Template defines how the Quota screen will appear when setting Quotas. Annually gives a quota based on an annual amount, Semiannual based on 6 month periods and so on.

These templates are available.

Annual Semiannual Quarterly Monthly 4 Weekly

NOTE: Remember - you can only set these once.



(Fig. 1)

3 & 4 - Fiscal Year Presentation

Two options control how the fiscal year appears in Microsoft CRM.

The first option (3 on diagram) configures how the fiscal year is presented. The options available to choose from include (examples are displayed below each option):

YYYY YY FY YYYY
 (2005) (05) (FY 2005)

FYYYYY FY YY FYYY

(FY2005) (FY 05) (FY05)

The second setting (4 on diagram) controls whether the fiscal year is named based on the year of the starting day in the fiscal year, or the year of the ending day in the fiscal year. This option is applicable when a fiscal year spans calendar years. For example, if an organization's fiscal year runs from July 1, 2005 through June 30, 2006, does the organization want this year named Fiscal Year 2005 or Fiscal Year 2006? If they want it named on the start date, then fiscal year 2005 is used; otherwise, fiscal year 2006 is used.

5. - Fiscal Period

This option controls how the fiscal period is presented in the application. The choices include:

P1	Period 1
Q1	Quarter 1
M1	Month 1
S 1	Semester 1

6. - Display As

This option configures how the fiscal year and period are presented together. When displaying the period and year together, define the manner in which the two are connected. The options include:

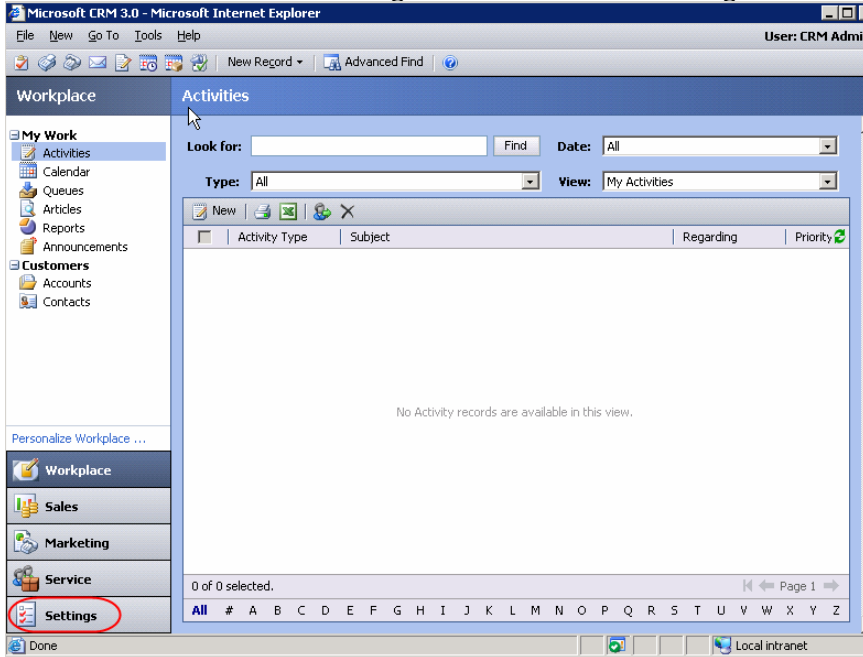
PI FYyy (space between)
PIFYyy (No Space between)
PI-FYyy (Hyphen)
PI/FYyy (Slash)

SALES QUOTAS

After the Fiscal Year has been set the Quotas become available.

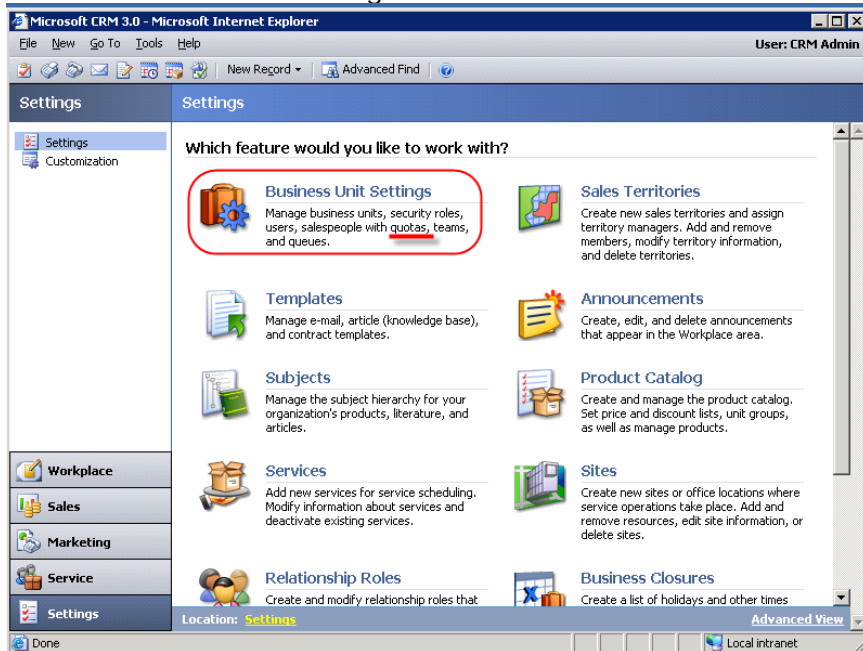
To set Quotas.

In Microsoft CRM click Settings from the section listing on the Left.



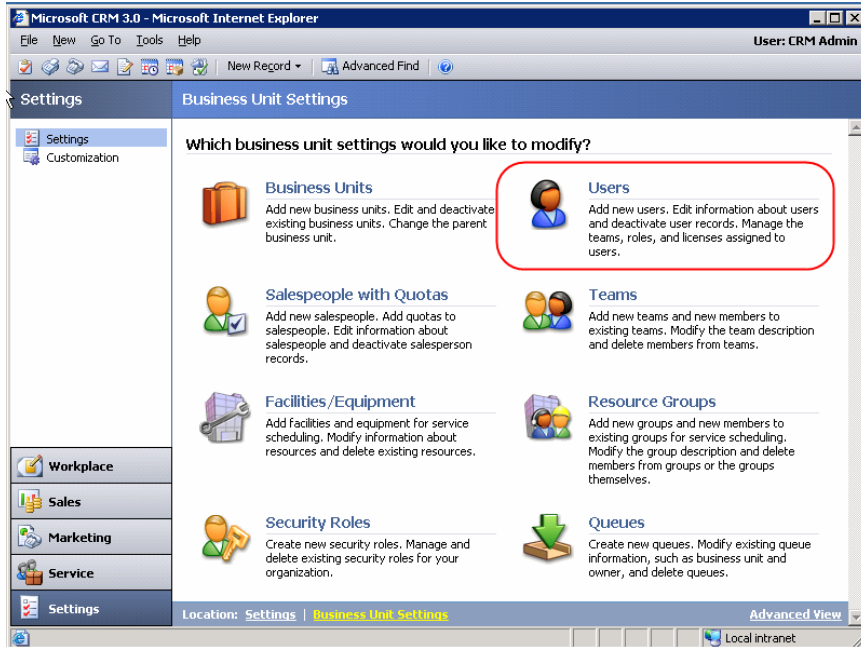
(Fig. 2)

Select Business Unit Settings icon from the main window.



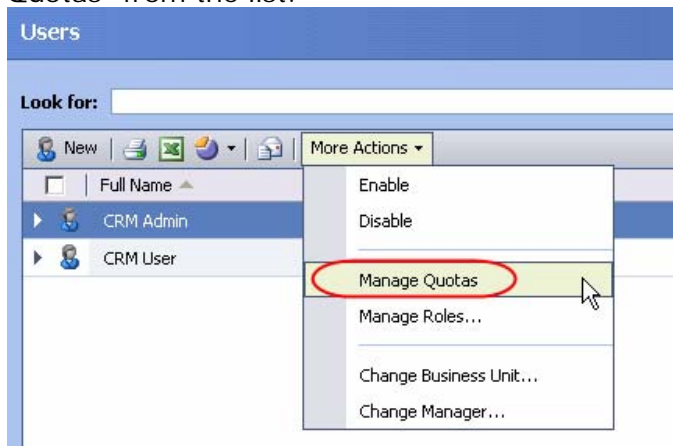
(Fig 3)

Select the Users icon from the main window.



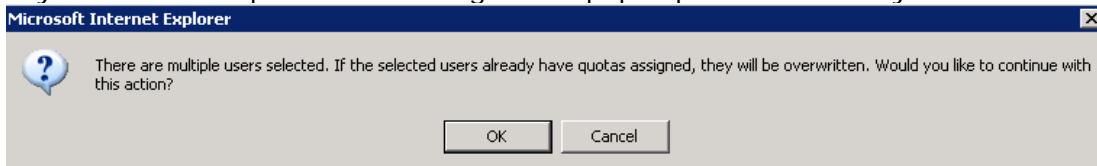
(Fig. 4)

Select the User/Users you would like to set Quotas for and then using "More Actions" select "Manage Quotas" from the list.



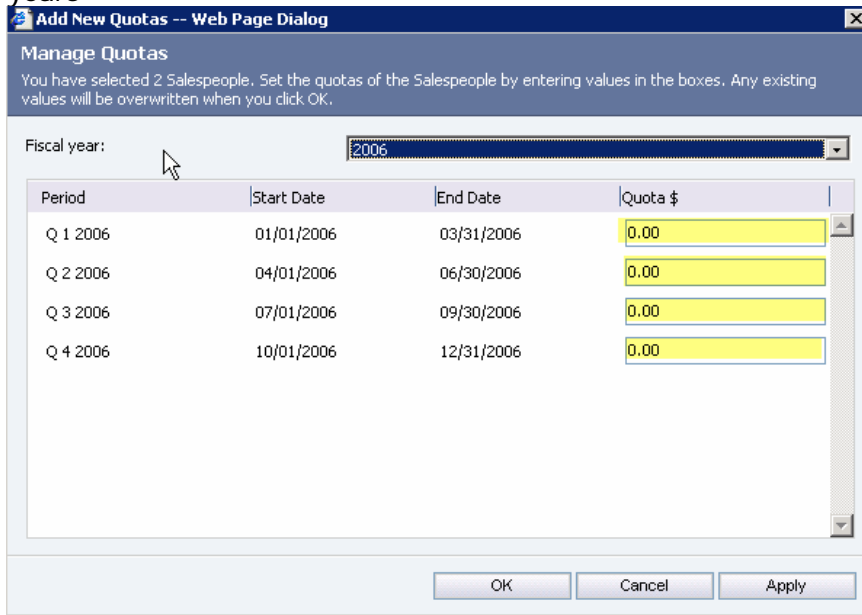
(Fig. 5)

If you select multiple users a dialogue box pops up at which time you can select OK or Cancel.



(Fig. 6)

These quotas will be set for each user you have selected. You can go in and edit each users quotas individually if required. You can use the Fiscal year drop down to proceed and set quotas through future years



(Fig. 7)

** This quotas screen has picked up the template settings you provided in the Fiscal Year period.

The Salespeople with Quotas can be used to manage quotas

