Tally.ERP9 Add-On

SalesMan Target Module

Cost centre as SalesMan

Set Sales Target for Monthly, Quarterly, Half Yearly, Yearly & Any period

Sales Target Vs Achievement Report

SalesMan Vs Stock Item Sales

SalesMan Vs Stock Item Sales Return

SalesMan Vs Stock Item Nett Sales

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Introduction

This add-on helps you to set and track the sales targets periodically for your Salesman / Executives / Agents which is maintained as cost-centres in Tally. Analyse the Target Vs Achievement for the period and get report of Salesman Vs Stock Item Sales, Sales return & Nett Sales.

Highlights

- Set sales targets for sales personals monthly, quarterly, half yearly, yearly and any period.
- Periodic report of Sales Target Vs Achievement.
- Figure out Sales personals performance in real time
- Separate reports of Items sold, returned by sales personals with target amount

Important!!!
As a best practice it is advisable to back up your company data before deploying any add-ons

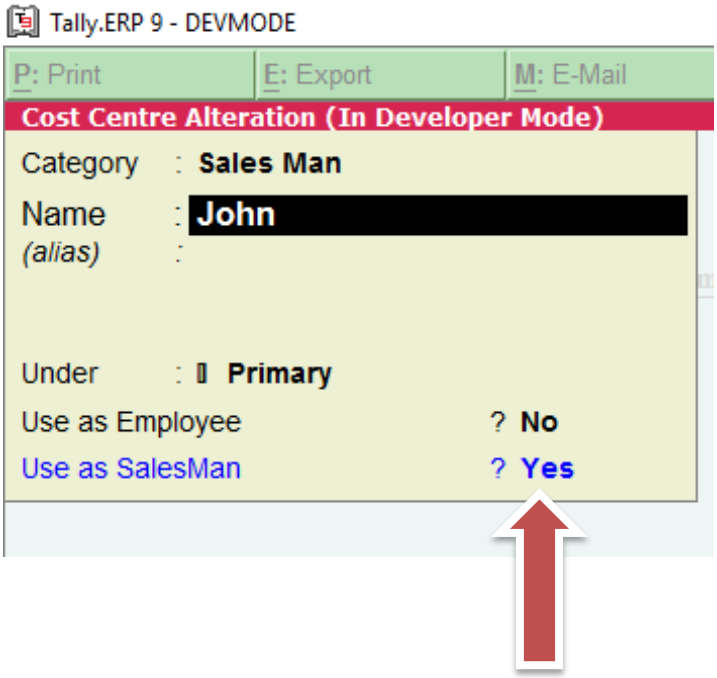
Prerequisites

To use this feature follow these Steps

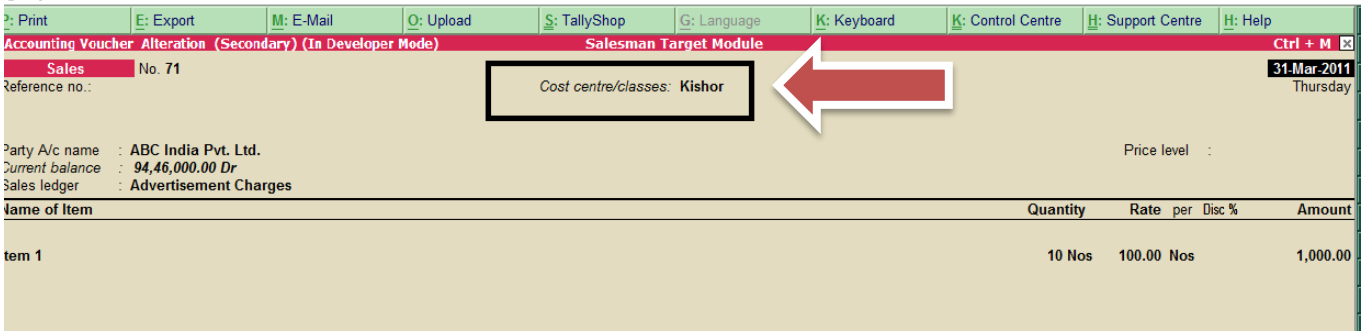
1. Update the cost center masters which is to be used as Salesman in transactions as follows

   Gateway of Tally -> Accounts Info -> Cost centres-> Create/Alter -> Set

   Use as SalesMan? Yes

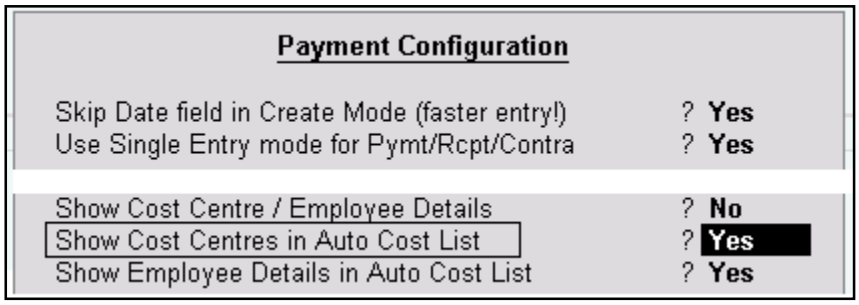


While creating Sales and Credit Note entry select the salesman (Cost Center / Classes) as follows



Tips : *You can easily maintain your salesman / broker / agent through Cost Center in Tally – Navigate to Gateway of Tally > F11 > Accounting Features > Set 'Yes' to the option 'Maintain Cost Centres' & 'Use Pre – defined Cost Centeres Allocations during Entry'*

If you are unable to get the Employee Name at this selection list – enable the option 'Show Cost Centre in Auto Cost List' at Voucher F12 Configuration:

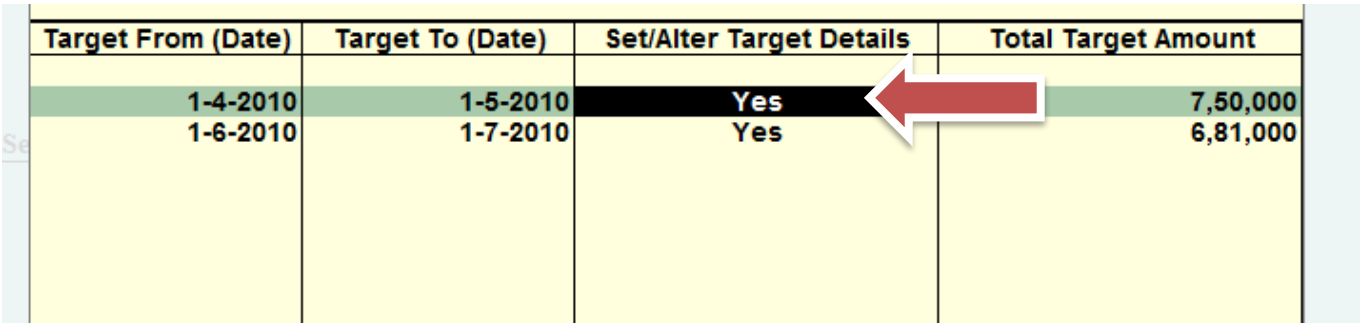


Note: *For more details please refer to the local help file of your Tally.ERP9 or search online in the Tally KB.*

Create Sales Target master

Gateway of Tally -> Sales Target -> Sales Target Master

*Define the **From and To date** & **Set/Alter Target Details as Yes** to enter target amount*



Target From (Date)	Target To (Date)	Set/Alter Target Details	Total Target Amount
1-4-2010	1-5-2010	Yes	7,50,000
1-6-2010	1-7-2010	Yes	6,81,000

Period	CostCentre/SalesMan Name	Sales Target Amount
1-Apr-2010 to 1-May-2010	John	5,00,000
1-Apr-2010 to 1-May-2010	Kishor	50,000
1-Apr-2010 to 1-May-2010	Suhas	2,00,000

Reports

1. Sales Target Achievement

Gateway of Tally -> Sales Target -> Sales Target Achievement

(Print, Email, Export, Upload options will be available only in licensed version)

SalesMan Target Achievement Report — **1-Apr-2010 to 31-Mar-2011**

CostCentre/SalesMan Name	Sales Value	Sales Return Value	Net Sales Value	Target Amount	Variance Amt	Variance %age
Ajay	20,000.00		20,000.00	25,000.00	(-)5,000.00	(-)20.00 %
John	37,37,240.00	26,74,540.00	10,62,700.00	11,00,000.00	(-)37,300.00	(-)3.39 %
Kishor	62,73,625.00	10,000.00	62,63,625.00	80,000.00	61,83,625.00	7,729.53 %
Suhas	17,67,000.00		17,67,000.00	2,26,000.00	15,41,000.00	681.86 %
Total	1,17,97,865.00	26,84,540.00	91,13,325.00	14,31,000.00	76,82,325.00	636.85 %

2. Cost centre(Salesman) wise Sales

Gateway of Tally -> Sales Target -> Cost centre wise Sales

(Print, Email, Export, Upload options will be available only in licensed version)

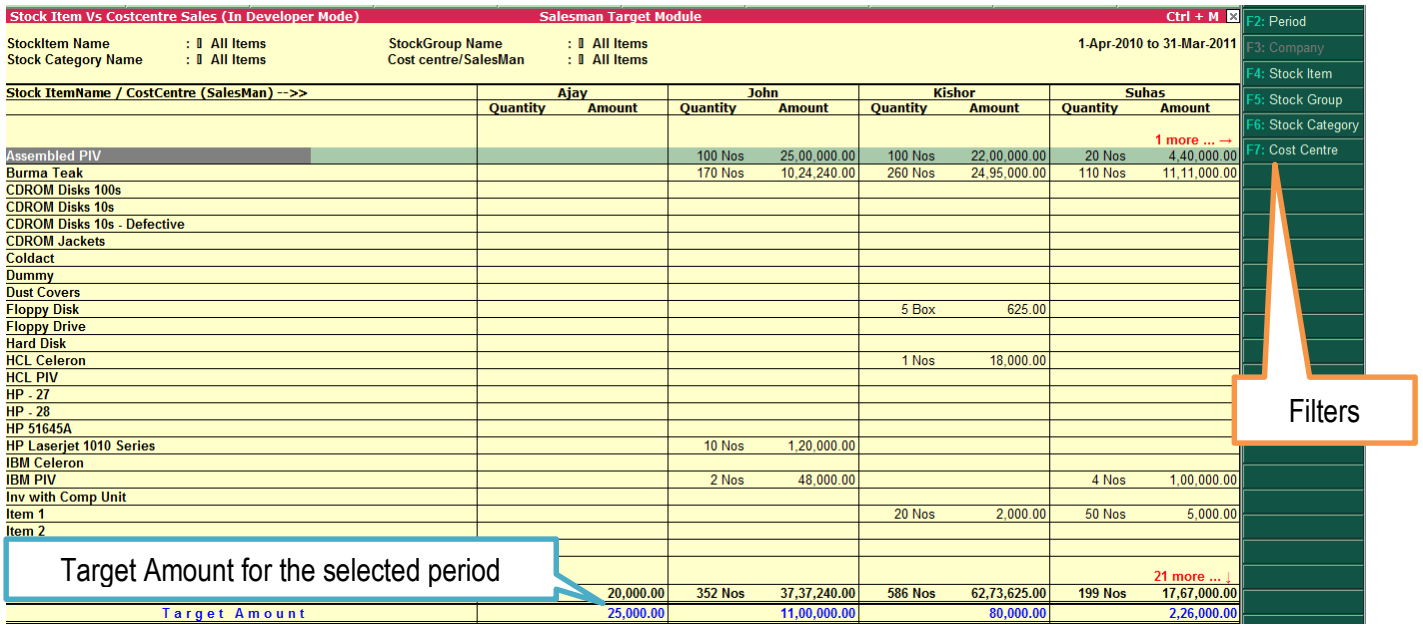
Key F4 to filter by Stock Item

Key F5 to filter by Stock Group

Key F6 to filter by Stock Category

Key F7 to filter by Cost centre (salesman)

Key F12 to Enable additional columns like Stock group, Stock Category and S.No.

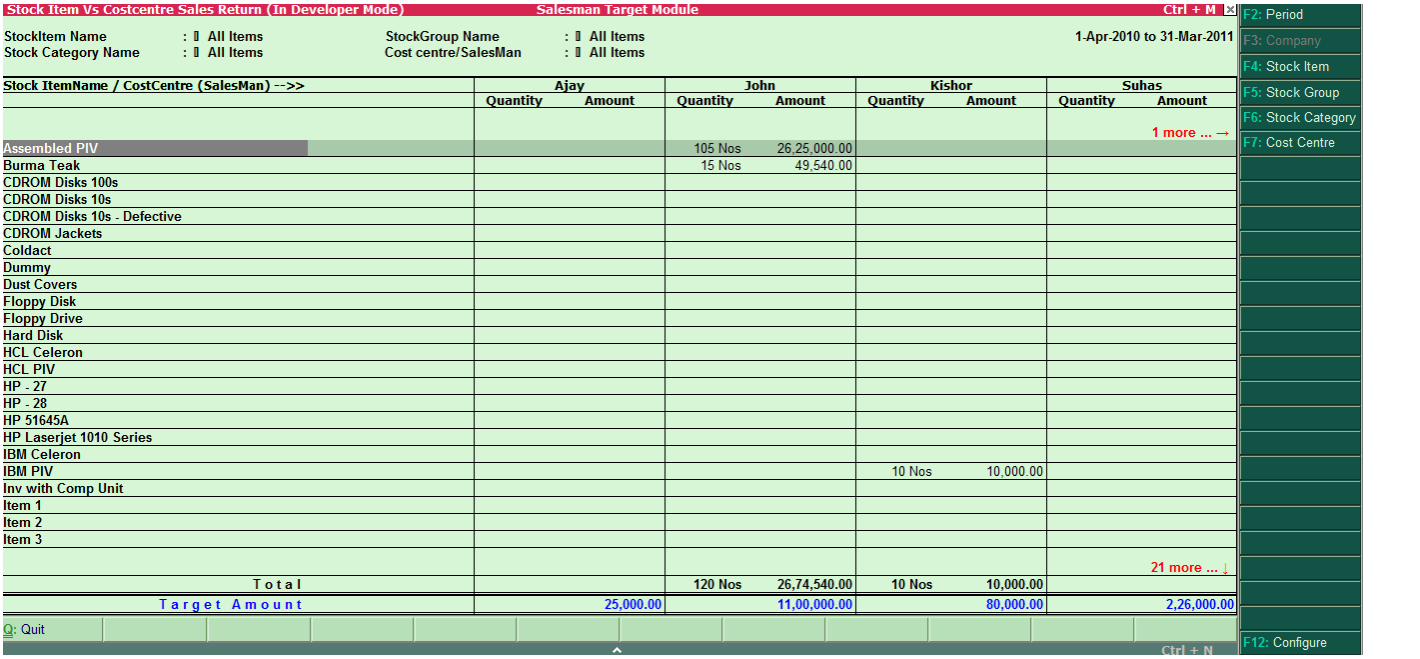


3. Cost centre(Salesman) wise Sales Return

Gateway of Tally -> Sales Target -> Cost centre wise Sales Return

This report is being generated from Credit Note vouchers which has salesman

(Print, Email, Export, Upload options will be available only in licensed version)



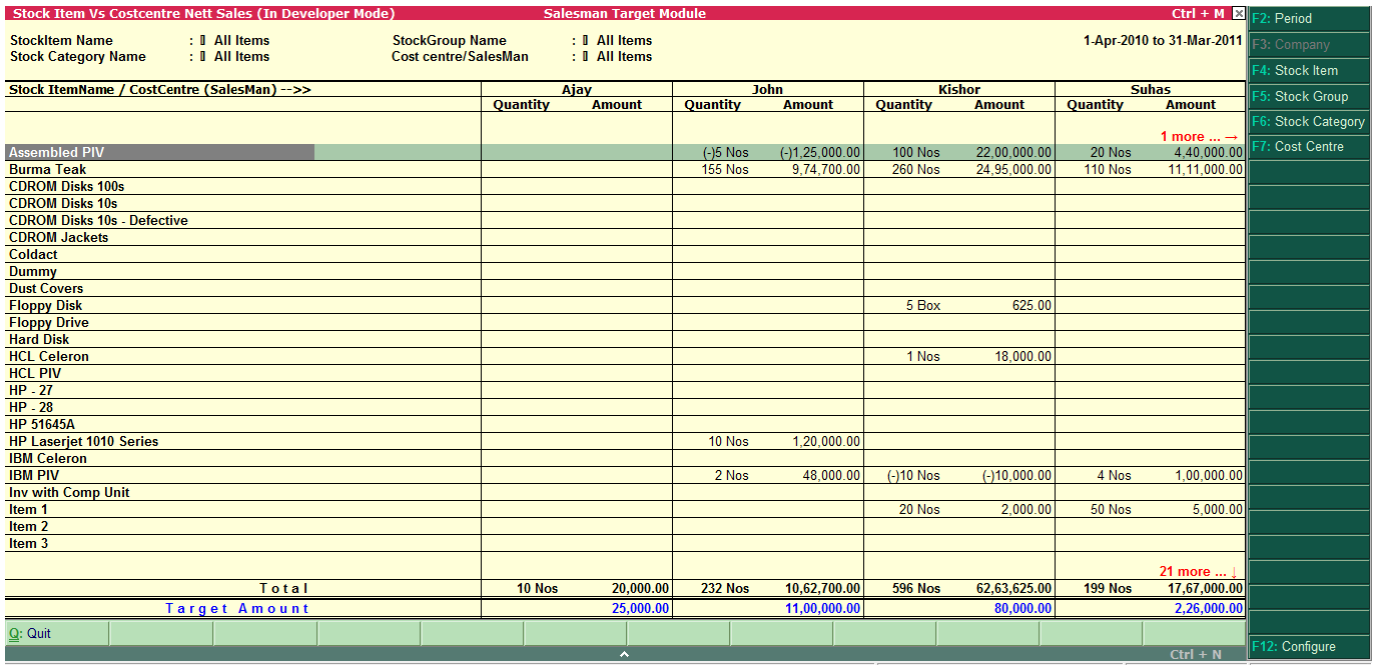
4. Cost centre(Salesman) wise Nett Sales

Gateway of Tally -> Sales Target -> Cost centre wise Nett Sales

This report is being generated from Sales and Credit Note vouchers which has salesman

Nett Sales = Sales – Credit Note

(Print, Email, Export, Upload options will be available only in licensed version)



Stock Item Vs Costcentre Nett Sales (In Developer Mode) — Salesman Target Module — Ctrl + M

StockItem Name : All Items | StockGroup Name : All Items | 1-Apr-2010 to 31-Mar-2011
Stock Category Name : All Items | Cost centre/SalesMan : All Items

Stock ItemName / CostCentre (SalesMan) -->>	Ajay		John		Kishor		Suhas	
	Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
								1 more ... →
Assembled PIV			(-)5 Nos	(-)1,25,000.00	100 Nos	22,00,000.00	20 Nos	4,40,000.00
Burma Teak			155 Nos	9,74,700.00	260 Nos	24,95,000.00	110 Nos	11,11,000.00
CDROM Disks 100s								
CDROM Disks 10s								
CDROM Disks 10s - Defective								
CDROM Jackets								
Coldact								
Dummy								
Dust Covers								
Floppy Disk					5 Box	625.00		
Floppy Drive								
Hard Disk								
HCL Celeron					1 Nos	18,000.00		
HCL PIV								
HP - 27								
HP - 28								
HP 51645A								
HP Laserjet 1010 Series			10 Nos	1,20,000.00				
IBM Celeron								
IBM PIV			2 Nos	48,000.00	(-)10 Nos	(-)10,000.00	4 Nos	1,00,000.00
Inv with Comp Unit								
Item 1					20 Nos	2,000.00	50 Nos	5,000.00
Item 2								
Item 3								
								21 more ... ↓
Total	10 Nos	20,000.00	232 Nos	10,62,700.00	596 Nos	62,63,625.00	199 Nos	17,67,000.00
Target Amount		25,000.00		11,00,000.00		80,000.00		2,26,000.00

Q: Quit — Ctrl + N

F2: Period | F3: Company | F4: Stock Item | F5: Stock Group | F6: Stock Category | F7: Cost Centre | F12: Configure

FAQ

Which version/releases of Tally.ERP 9 does the add-on support?

This add-on will work only with Tally.ERP 9 Series A, release 3.0 onwards.

How to buy this Add-on?

Just visit our website http://zadoksystems.com/tally-erp9-add-onsSign up and place your order and pays by Online Transfer (NEFT) / Cheque / Cash Deposit. Once the Order has completed and payment made, we will send you the Add-on by e-Mail.

Will new features added be available to us?

We offer one year availability of all support and new features free of cost. After one year, nominal subscription cost will be applicable to you to continue to get free support and updates.

What will happen after one year?

20% of the MRP will be charged, in case free support and updates will be required by you.

How will I get support for this Add-on?

For any functional support requirements please do write to us on info@zadoksystems.com or call us at +91-9003144582.

If I need some enhancement / changes to be incorporated for the add-on, whom should I contact?

Please to write to us on info@zadoksystems.com with your additional requirements and we will revert to you in 24 hours.