Targets and budgets

September 11, 2026

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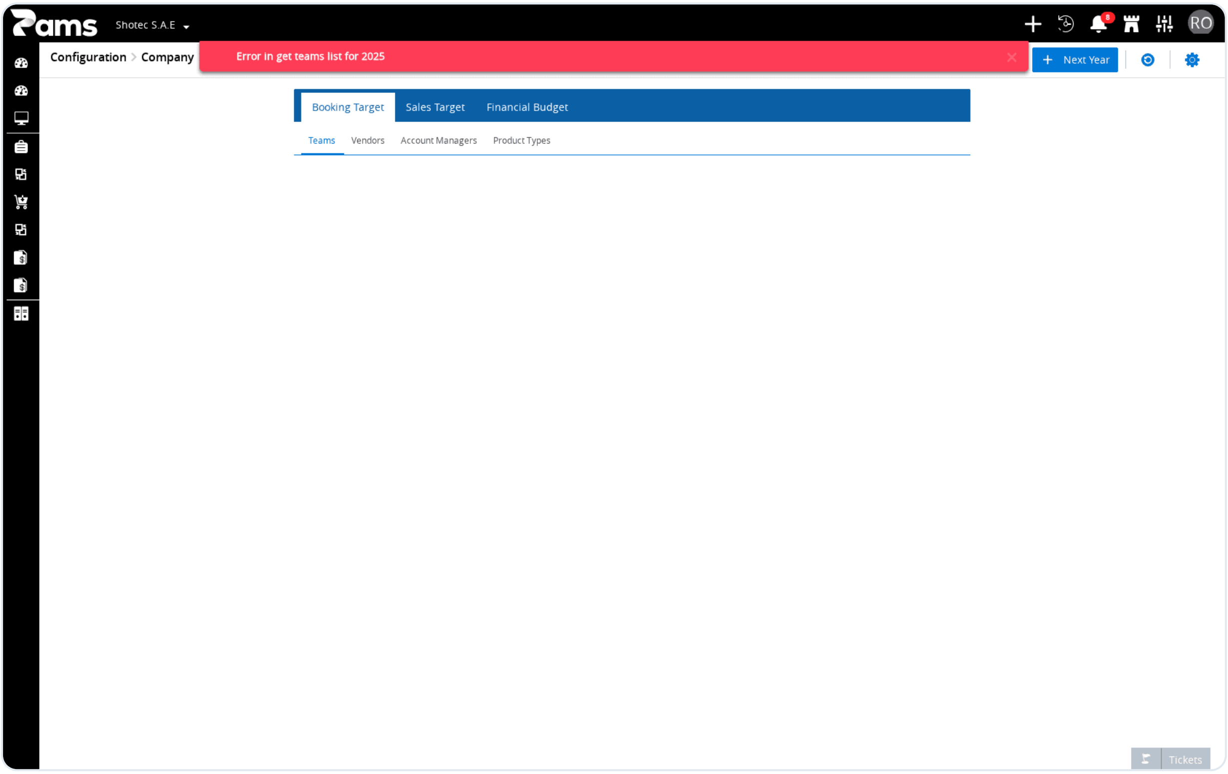
Targets and budgets is the configuration area for reviewing booking targets, sales targets, and
financial budgets for a selected year.

If you need to…	Go to
Review booking values by organisational group	Find the target or budget area, then choose a booking tab.
Review sales values	Find the target or budget area, then choose **Sales Target**.
Review financial budget values	Find the target or budget area, then choose **Financial Budget**.
Understand the fields and limits	Understand the target and budget tables.
Maintain a value	Maintain targets and budgets.
Resolve a blocked or unloaded screen	When validation or loading fails.



Before you start

The selected year determines the period you are reviewing, while subscription and access conditions
determine which target areas and edit actions appear.

Prerequisites

- Know the year you need to review.
- Have access to booking target settings for booking sections.
- Have access to financial budget settings for budget sections.
- Have permission to edit values when you need to maintain them.
- Identify the branch whose rows you need to review before opening its details.

The screen can obtain rows from branch data for principals, booking, account managers, product types,
finance budgets, and net profit. The rows available to you therefore depend on the branch data in your
configuration.

Find the target or budget area

Use the tabs to move from the broad area to the group of values you need to review.

Prerequisites

- Open Targets and budgets.
- Know whether you need booking, sales, or financial budget values.

Steps

1. From the Configuration area, open Targets and budgets.
2. In **Year**, select the year you need to review.
3. Select the main area that matches what you need to review:

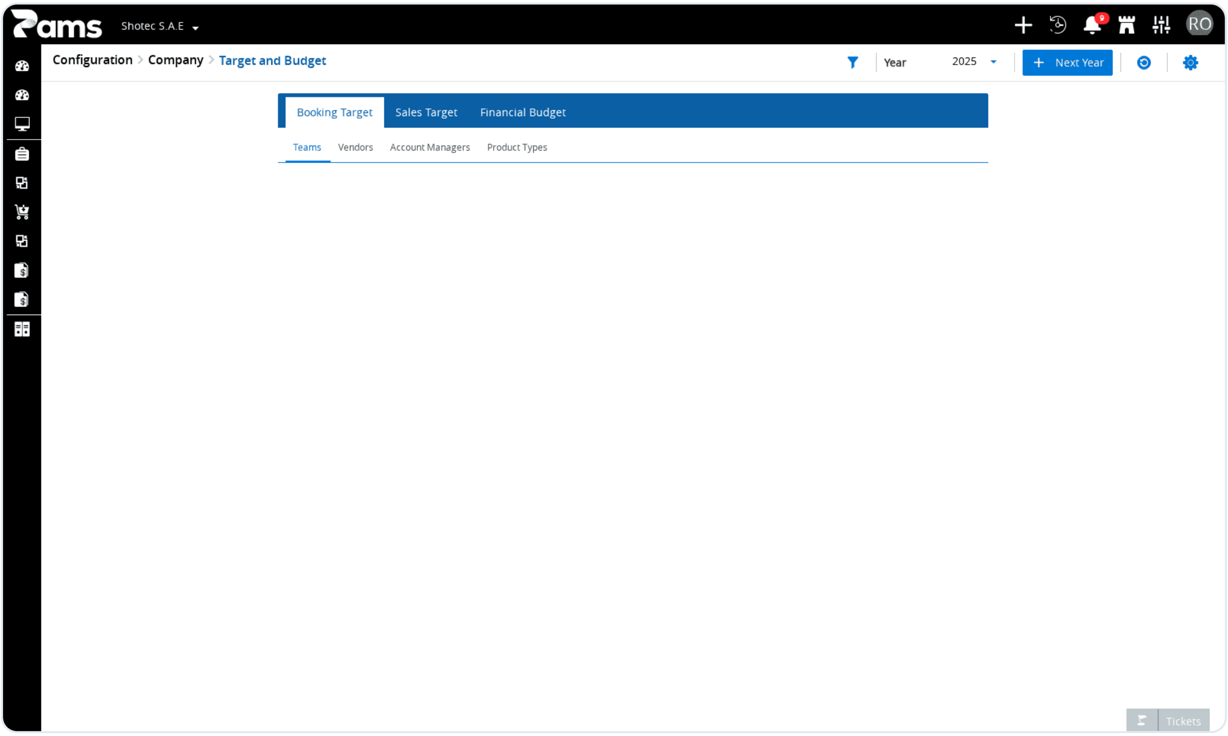
If you need to review…	Select
Booking values	**Booking Target**
Sales values	**Sales Target**
Financial budgets	**Financial Budget**

4. If you selected **Booking Target**, choose the booking group:

If you need to review…	Select
Team values	**Teams**
Vendor values	**Vendors**
Account-manager values	**Account Managers**
Product-type values	**Product Types**

5. If you selected **Financial Budget**, choose the budget group:

If you need to review…	Select
COGS values	**COGS**
SG&A values	**SG&A**
Depreciation values	**Depreciation**
FORX values	**FORX**
Net profit values	**Net profit**



6. If the required area is not available, check that the relevant subscription is active.

Result: The selected target or budget area is on screen.

Understand the target and budget tables

Each target or budget area presents its own fields in an edit popup. The available rows come from your
configured branches, so work from the names and columns visible in the selected area.

Field shown in an edit area	Type	Requirement or limit	Area
Reference Margin	Number	From 0 through 100	Nominal-margin area
Set target	Number	Required; minimum 0	Product-type target and sales-target areas
Set budget	Number	Required; minimum 0	SG&A, depreciation, and FORX budget areas
Set margin (%)	Number	Required; from 0 through 100	Product-type margin area
Name	Text	Required for a new group; optional when editing a group	Product-group areas

Field shown in an edit area	Type	Requirement or limit	Area
Product types	Text	Optional	Group edit area
Unlabelled target value	Number	Required in the account-manager area; minimum 0 in target areas	Account-manager and principal-target areas
Unlabelled target amount	Number	Minimum 0	Team-target area
Unlabelled total target	Number	Minimum 0	Team-target area for the applicable distribution rules

The screen also contains the **Year** select box and the first-view actions titled **Apply filter**,
Refresh, and **Settings**, together with **Next Year**. The first view does not show table columns,
and two controls have no text label. Use the field or column names that appear after you open a target
area rather than assuming that every branch produces a row.

The page has no reader-facing Reference Commission field. The available group fields are **Name**
and **Product types**. The target and budget values use non-negative numbers, while percentage fields
use the range 0 through 100.

> [!NOTE]
> The fields shown in an edit area depend on the target or budget group you selected.

When you can identify a field and its limit, continue to Maintain targets and budgets.

Maintain targets and budgets

Use these steps when you have edit access and the target or budget row you need is available.

Prerequisites

- Complete Find the target or budget area.
- Open the branch containing the value you need to maintain.

- Have the target, budget, or percentage value ready.
- Confirm that your access allows editing.

Steps

1. Choose the target or budget group that contains the value.
2. Open the available edit action for the row.
3. Enter a non-negative value in the target or budget field.
4. Enter a percentage from 0 through 100 when the field is **Reference Margin** or `Set margin (%)`.
5. Complete every field marked required in the edit area.
6. Select the available save action.
7. Check the edit area for the value you entered.

Use **Next Year** when you need to start the next available year rather than change a value in the current year. Before continuing, check that the value remains visible in the area you selected.

Result: The selected target or budget area remains on screen with the value you entered when the available edit path accepts it.

For a branch or product-group variation, continue to Handle branch and product-group variations.

Handle branch and product-group variations

Branch-backed areas organise values by the branch data available to your configuration. Opening a branch exposes the actions for that branch; edit actions additionally depend on edit permission.

Prerequisites

- Open a booking, sales, or budget group with branch rows.
- Know whether you are maintaining a row or a product group.

Steps

1. Open the branch containing the row you need.
2. Choose the available edit action for the row.

3. For product-group work, select **Manage groups**.
4. For a new group, select **Group**.
5. Enter the group name in **Name**.
6. Choose the product types for the group in **Product types**.
7. Select the available save action.
8. Open **Last Modifications** when you need to review the available modification history.

Actions represented only by an icon appear only when their branch and access conditions allow them.

Result: The selected branch or group area is open, with its available maintenance actions on screen.

When validation or loading fails

Use the message text as your starting point, then correct the value or return to a usable configuration
area.

What you see	What it means	What to do
`Forbidden characters detected. Please remove them and try again.`	The value contains a forbidden character.	Remove the forbidden character, then select the available save action again.
`Check validation`	The edit area did not pass validation.	Review the fields marked required and the numeric limits, then select the available save action again.
`Group must have at least one product type`	The group has no product type.	Add at least one product type in **Product types**.
`Error in get teams list for 2025`	The teams list did not load for the selected year.	Use the available navigation controls to return to a usable target area.
The sign-in form appears after you choose **Product Types**.	The configuration screen is no longer available in the current session.	Sign in again, then reopen Targets and budgets.

Confirm the result and continue

After reviewing a value, use the controls that are available on the selected area.
Export is the
page action for taking the available table data outside the screen; **Last Modifications** is the
available history action for a branch area. The header also provides **Apply filter**, **Refresh**, and
Settings.

Steps

1. Check the selected area for the value you reviewed or changed.
2. Choose the action that matches your next task:

If you need to…	Select
Review the available history for an open branch	**Last Modifications**
Take the available table data outside the screen	**Export**
Reload the current area	**Refresh**
Open the available table settings	**Settings**

3. Return to Configuration home to choose another configuration area.
4. Open Default layouts when the table layout needs separate maintenance.

Result: The selected target or budget area remains available for review, history, export, refresh,
settings, or the next configuration task.