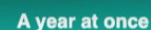
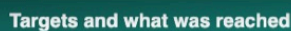


A guide to sales targets: the targets and what was reached, setting a target, the generator of a year, printing and access rights.

In plain words: A target on a whiteboard, the real numbers in a spreadsheet, and on the 20th nobody knows who is on track. **Sales Targets** puts both in Odoo: a **target** for a salesperson or a team over a period, and next to it what was **really invoiced** (or ordered), the **percentage**, what is **left** and a status, always up to date because it is computed from your invoices.



Tip: Salespeople see their own targets and those of their team. Managers set them all.

2. What you get

Feature	What it does
Targets	For a salesperson, a sales team or both, over any period, in the currency of the company.
Two ways to count	Invoiced: the posted invoices minus the credit notes, without taxes. Confirmed orders: the untaxed total of the confirmed sales orders.
Always up to date	The amount reached, the percentage and what is left are computed when you open the list.
Status	Upcoming, Running, Reached (the amount is there) or Missed (the period is over and it is not).
Generator	A year of monthly, quarterly or yearly targets for several salespeople or a team in one step; no duplicates.
Who sees what	Salespeople see their own targets and their team's; sales managers see and change everything.
Print	A summary of the targets and what was reached.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Sales (sale) and Invoicing
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_sales_targets.zip` ; unzip it to get the folder `taqnix_sales_targets` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Sales Targets** and press **Install**.

```
# or from the command line  
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_sales_targets --stop-after-init
```

5. The targets

In plain words: Sales → Reporting → Sales targets. The list opens on the targets running *this month*; clear the filter to see all of them, or group by salesperson, team or month.

Sales

Orders

To Invoice

Products

Reporting

Configuration

Warranty

4

3

My Company

A

New

Sales targets

Q

T

This month

X

Search...

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☐ Target	Salesperson	Sales team	Counted on	Target	Reached	Reached %	Left	Status	
☐ Sam Carter Oct 2026	S Sam Carter		Invoiced	\$ 36,000.00	\$ 40,192.00	112 %	\$ 0.00	Reached	
☐ Mia Roberts Oct 2026	M Mia Roberts		Invoiced	\$ 22,000.00	\$ 14,300.00	65 %	\$ 7,700.00	Running	
☐ Dan Whitaker Oct 2026	D Dan Whitaker		Invoiced	\$ 16,000.00	\$ 7,000.00	44 %	\$ 9,000.00	Running	
☐ Retail Oct 2026		Retail	Invoiced	\$ 60,000.00	\$ 42,700.00	71 %	\$ 17,300.00	Running	
☐ Sam Carter Jan 2026 – Dec 2026	S Sam Carter		Confirmed orders	\$ 200,000.00	\$ 37,850.40	19 %	\$ 162,149.60	Running	
				\$ 334,000.00	\$ 142,042.40				

This month: Sam is above the target, Mia and Dan are on their way, the team is at 71%.

SalesOrdersTo InvoiceProductsReportingConfigurationWarranty

New

Sales targets

Q

Search...

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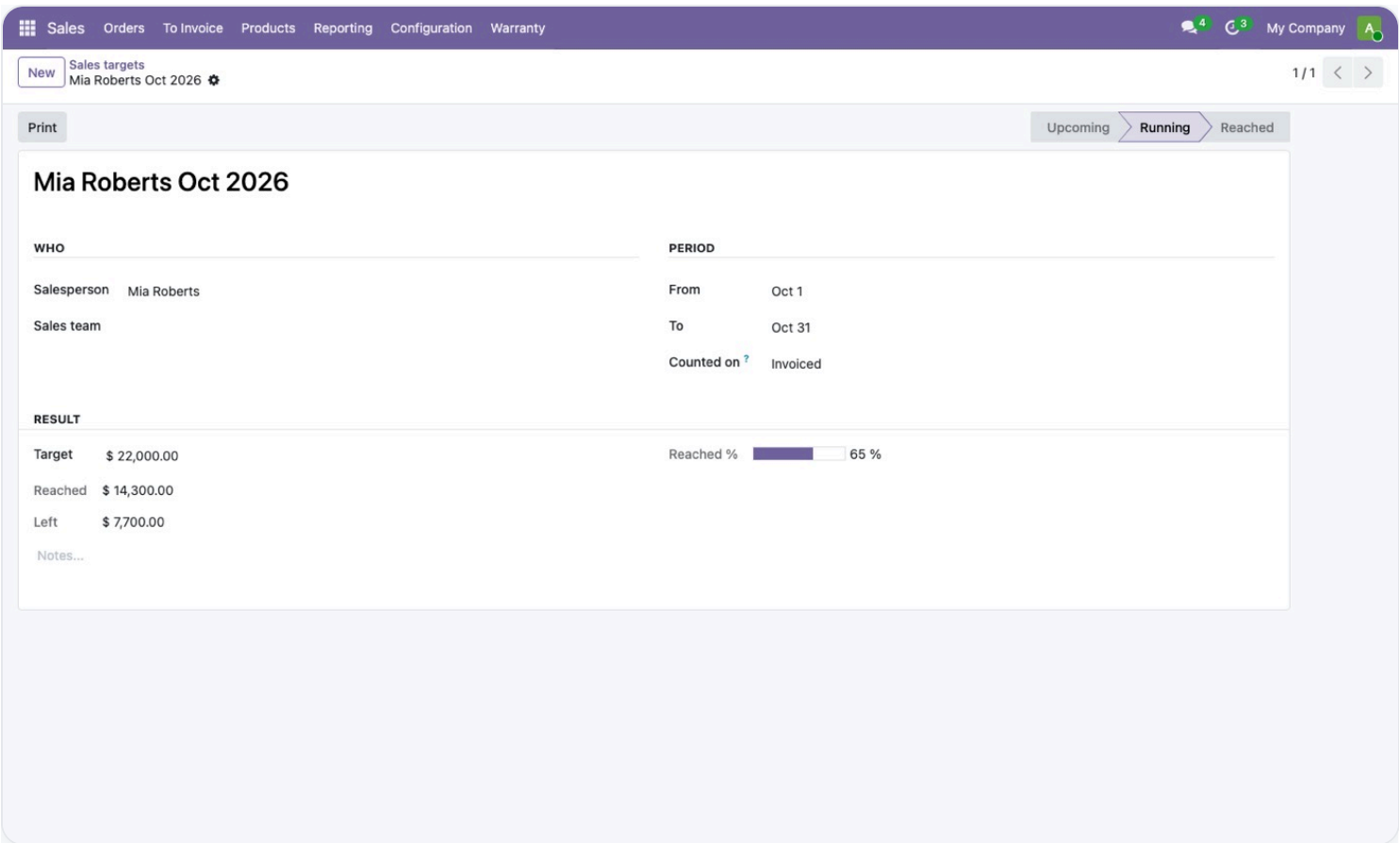
☐ Target	Salesperson	Sales team	Counted on	Target	Reached	Reached %	Left	Status	
☐ Sam Carter Nov 2026	S Sam Carter		Invoiced	\$ 22,000.00	\$ 0.00	0 %	\$ 22,000.00	Upcoming	
☐ Mia Roberts Nov 2026	M Mia Roberts		Invoiced	\$ 22,000.00	\$ 0.00	0 %	\$ 22,000.00	Upcoming	
☐ Dan Whitaker Nov 2026	D Dan Whitaker		Invoiced	\$ 22,000.00	\$ 0.00	0 %	\$ 22,000.00	Upcoming	
☐ Sam Carter Oct 2026	S Sam Carter		Invoiced	\$ 36,000.00	\$ 40,192.00	112 %	\$ 0.00	Reached	
☐ Mia Roberts Oct 2026	M Mia Roberts		Invoiced	\$ 22,000.00	\$ 14,300.00	65 %	\$ 7,700.00	Running	
☐ Dan Whitaker Oct 2026	D Dan Whitaker		Invoiced	\$ 16,000.00	\$ 7,000.00	44 %	\$ 9,000.00	Running	
☐ Retail Oct 2026		Retail	Invoiced	\$ 60,000.00	\$ 42,700.00	71 %	\$ 17,300.00	Running	
☐ Sam Carter Sep 2026	S Sam Carter		Invoiced	\$ 18,000.00	\$ 17,800.00	99 %	\$ 200.00	Missed	
☐ Mia Roberts Sep 2026	M Mia Roberts		Invoiced	\$ 15,000.00	\$ 15,000.00	100 %	\$ 0.00	Reached	
☐ Dan Whitaker Sep 2026	D Dan Whitaker		Invoiced	\$ 12,000.00	\$ 12,000.00	100 %	\$ 0.00	Reached	
☐ Sam Carter Jan 2026 – Dec 2026	S Sam Carter		Confirmed orders	\$ 200,000.00	\$ 37,850.40	19 %	\$ 162,149.60	Running	
				\$ 445,000.00	\$ 186,842.40				

All the targets: reached, running, missed and upcoming.

Column	Meaning
Target	The amount to reach.
Reached	What was invoiced or ordered in the period for this salesperson or team.
Reached %	Reached divided by the target. It can go over 100.
Left	What is missing; never below zero.
Status	Upcoming, Running, Reached or Missed.

6. Set a target

In plain words: Press **New**, choose the **salesperson** and/or the **sales team**, the **period**, what it is **counted on** and the **target**.



A target with its progress.

Choice	What is counted
A salesperson	What this salesperson invoiced (the salesperson of the invoice) or sold (the salesperson of the order).
A sales team	What the team invoiced or sold, whoever the salesperson is.
Both	Only what the salesperson did for that team.

Tip: Invoices count on their invoice date, orders on their order date. Amounts are in the currency of the company, without taxes.

7. A whole year at once

In plain words: Sales → Reporting → Generate targets (managers): choose the salespeople or a team, the year, monthly, quarterly or yearly periods and the amount of each period. A target is created for each one; the ones that already exist are not repeated.

SalesOrdersTo InvoiceProductsReportingConfigurationWarranty

43My CompanyA

Generate targets

Salespeople

Dan Whitaker X Mia Roberts X Sam Carter X

Or a sales team

Year

2027

Period

Monthly

Target for each period

\$ 22,000.00

Counted on

Invoiced

A target is created for each period of the year and each salesperson. Targets that already exist are not duplicated.

Generate

Cancel

Monthly targets of 22,000 for three salespeople for 2027.

8. Print

In plain words: Select targets in the list and press **Print** to get a summary with what was reached.



My Company
United States

Sales targets

Target	Counted on	Target	Reached	Reached %	Left Status
Sam Carter Oct 2026	Invoiced	\$ 36,000.00	\$ 40,192.00	111.6 %	\$ 0.00 Reached
Mia Roberts Oct 2026	Invoiced	\$ 22,000.00	\$ 14,300.00	65.0 %	\$ 7,700.00 Running
Dan Whitaker Oct 2026	Invoiced	\$ 16,000.00	\$ 7,000.00	43.8 %	\$ 9,000.00 Running
Retail Oct 2026	Invoiced	\$ 60,000.00	\$ 42,700.00	71.2 %	\$ 17,300.00 Running
Sam Carter Jan 2026 – Dec 2026	Confirmed orders	\$ 200,000.00	\$ 37,850.40	18.9 %	\$ 162,149.60 Running

The printed summary.

9. Who can do what

Who	Can
Salespeople	See their own targets and those of their sales team, and what was reached. They cannot change them.
Sales managers	See and create, change and delete all the targets, and generate them.

10. Arabic and right to left

My Company

المبيعاتالطلباتبانتظار الفوترةالمنتجاتإعداد التقاريرالهيئةالضمان

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بحث... هذا الشهر

جديدأهداف المبيعات

الهدف	مندوب المبيعات	فريق المبيعات	يُحسب على	الهدف	المحقق	المحقق %	المتبقي	الحالة
Sam Carter Oct 2026	Sam Carter	المغوتر		\$ 36,000.00	\$ 40,192.00	112 %	\$ 0.00	المحقق
Mia Roberts Oct 2026	Mia Roberts	المغوتر		\$ 22,000.00	\$ 14,300.00	65 %	\$ 7,700.00	جاري
Dan Whitaker Oct 2026	Dan Whitaker	المغوتر		\$ 16,000.00	\$ 7,000.00	44 %	\$ 9,000.00	جاري
Retail Oct 2026	Retail	المغوتر	Retail	\$ 60,000.00	\$ 42,700.00	71 %	\$ 17,300.00	جاري
Sam Carter Jan 2026 – Dec 2026	Sam Carter	الطلبات المؤكدة		\$ 200,000.00	\$ 37,850.40	19 %	\$ 162,149.60	جاري
				\$ 334,000.00	\$ 142,042.40			

The targets in an Arabic interface.

11. Limits

Limit	Detail
Net of taxes	Amounts do not include taxes.
No commission	The module follows targets; it does not compute commissions.
One amount per target	A target is for one salesperson or team and one period; use the generator for many.
Computed on opening	The figures are calculated when you open a list or a form; with very many targets on very large invoice volumes this takes a moment.

12. For developers

In plain words: Skip this chapter if you only use the module.

```
target = env['taqnix.sales.target'].create({
    'user_id': user.id, 'date_from': '2026-10-01', 'date_to': '2026-10-31', 'amount': 200
})
target.achieved, target.percent, target.status
```

13. Troubleshooting

Problem	What to do
A salesperson sees nothing	Targets are visible to the salesperson, and to the members of the team of a team target.
The reached amount looks low	Only posted invoices count, on their invoice date, by the salesperson of the invoice. Check the basis: invoiced or confirmed orders.
"Choose a salesperson or a sales team"	A target needs one of them.
Generated nothing	The targets already existed for those periods.

14. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_sales_targets` . Targets are kept.

15. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Targets for salespeople and sales teams over any period
- Reached amount from posted invoices (net of credit notes) or confirmed orders, percentage, left, status
- Generator for monthly, quarterly or yearly targets without duplicates
- Salespeople see their own and their team's targets; managers set all
- Printable summary
- Arabic translation, automated tests