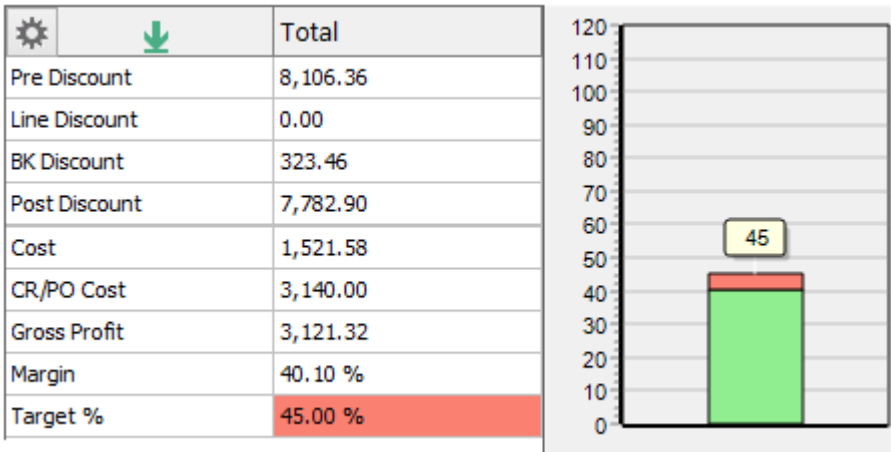


## Profit Margin Targets

### Compare estimated or actual against Profit Margin targets!

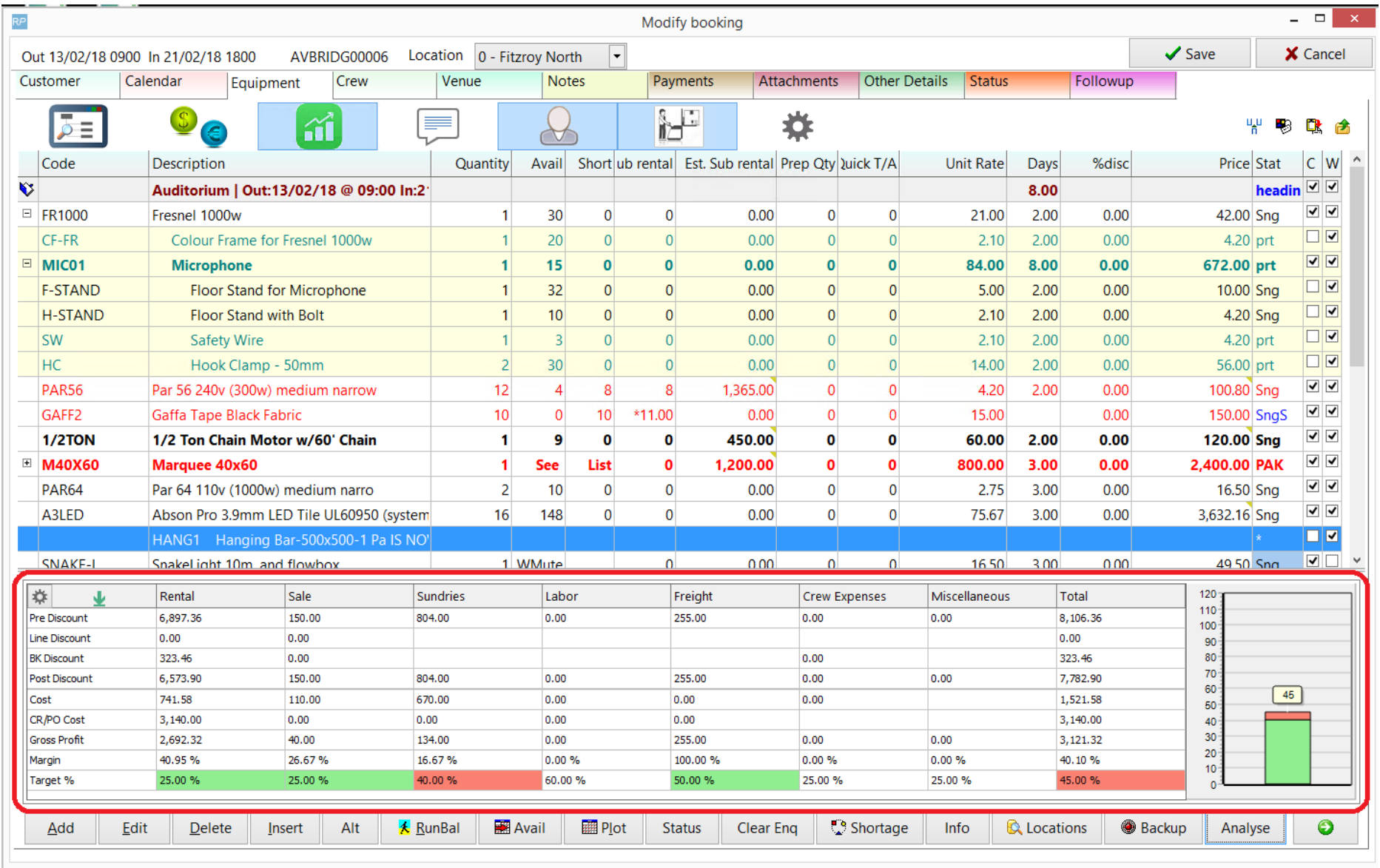
Target profit margin percentages can be set and used to compare estimated profit margin for a job/booking, this may assist in submitting more profitable proposal / quotations before final commitment. The Actual profit margin may be used forensically to compare against the target margin to help improve future profit margin outcomes.

Below, in this example the estimated margin for the booking is 40.10% and the target is 45%, therefore this is shown to the user highlighted in red, the top of the graph is also shown in red to indicate that the target margin has not been reached.



The estimated or actual (applies to sub rentals), profit margin is shown on the Profit Margin Panel, there are separate Profit Margin Targets for Rental, Sale, Sundries, Labour (Labor is North American spelling), Freight, Crew Expenses, Miscellaneous and the overall total as shown above.

Below the Margin and Target Margin is shown on the Margin panel, which is located on the booking “Equipment” Tab -



The Target Margin may vary between small and large jobs, for example – the margin target may be smaller for very large jobs and larger for smaller jobs.

Target Margin Report

This report shows managers all the bookings that are below the target margin, based on the filters shown below such as location (if a multi-location system), operator, Progress Status and the days range (ahead and behind).

Target margins

Booking #	Company	Showname /	Warehouse Out date	Warehouse In date	Salesperson	Amount	Target Margin	Margin	Invoiced	Progress Status
AVBRIDG00006	Audio Visual Bridges Data Systems Inc	master	13/02/18	21/02/18		7782.89	45.00	40.10	N	Heavy
1ACME00053	The Acme Inc		19/02/18	21/02/18		1471.17	50.00	14.91	Y	Confirmed
AVBRIDG00004	Audio Visual Bridges Data Systems Inc	master	22/02/18	26/02/18	KS	6521.76	45.00	-4.78	Y	Confirmed

Refresh

Display Preferences

☐ Overdue Unconfirmed

☐ Overdue for Checkout

☐ Overdue For Return

☐ Overdue For Invoicing

☐ Overdue For Project Invoicing

☐ Bookings To Be Re-Invoiced

☐ Long Term To Be Invoiced

☐ Reserved Asset Conflicts

☒ Target Margins

Location Scope

☒ All

☐ Location

S - Auburn Park Renaisense

Operator Scope

☒ All Operators

☐ Operator

Progress Status

☒ Quote

☒ Light Pencil

☒ Heavy Pencil

☒ Confirmed

Days Range

Ahead

39

Behind

10

Reset Timer

Print

Close

The figure shown in the ‘Margin’ column is the margin percentage last calculated in the booking window, this may use the estimated cross rental figure or the actual cross rental figure.

The report displays as a grid (shown above) and is a tab on the overdue for reminders report, it then may be printed.

Double clicking a booking on the grid, opens it.

Setting Up the Target Margins

The Target Margins can be found on the set up menu.

Below is an example of the set up window on the “Rental” tab, these are the margins that are being set for all rental amounts.

RP

Margin Targets Values

✕

Rental	From	To	Margin Percent
Sale	0	1000	50
Sundries	1001	3000	40
Labour	3001	5000	30
Freight	5001	10000	25
Crew expenses	10001	999999999	20
Miscellaneous	0	0	0
Total	0	0	0
	0	0	0

✓ OK

✕ Cancel

There are separate margin percentages for Rental, Sale, Sundries, Labour, Freight, Crew Expenses, Miscellaneous and the Total overall.

To set the margin percentages for each, click on the name on the left panel. Click on the “Total” to set the overall target margins.

The target margin may vary according to the size of the job, so in the example above for rental amounts from 0 to 1000 the target margin is 50%.

For rental amounts over 10k the target margin percentage is 20%.

Click on the OK button to save the margins.