Associate Goals

Overview

With the **Associate Goals** feature, you will be able to define monthly goals for each associate. These goals can be displayed on **Dashboards**, **Commission Report**, and the **brand-new Associate Goals Report**.

Goals will be available for many things such as number of **items sold, dollar amount sold, service jobs, opportunities**, and more. Additionally, each month can have a different set of goals allowing you to account for seasonal variations.

Setting Associate Goals

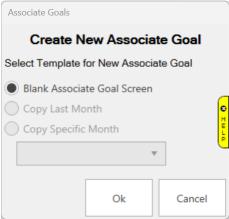
A new **Goals** tab was added to the **Associate** record that allows you to **manage Goals** in one location. Here you can **view** all the **goals** for your selected associate, as well as **add** new goals, **edit** existing goals, and **delete goals** and are available for **Service Jobs, Care Plans, Opportunities**, and **New Customers**. Goals set here can then be tracked through **Dashboards** and **Reports**.

To add Associate Goals:

- 1. Navigate to Administrative > Associates > Associate List.
- 2. Select the **Associate** from the list and double click, or click **Edit**, to open the **Associate** record.
- 3. Click the **Goals** tab. This will bring up the **Goals** window allowing you to **add new goals** for your Associate.

NOTE: Alternatively, you may also **Edit** existing Goals and/or **Delete** Goals for your selected associate from this same screen using the corresponding button for your desired action.

 Click Add. The Create New Associate Goals window will appear asking you to select a template for setting your goals. Your options are: Blank Associate Goal Screen, Copy Last Month, or Copy Specific Month (with a drop-down to select your desired month). In this example we will select Blank Associate Goal Screen.



5. The **Associate Goal** screen will open with a grid displaying the available options for where you can add goals.

Items		Repairs		Custom Jobs		Opportunities Created	
Goal \$ Amount	0	Goal \$ Amount	0	Goal \$ Amount	0	Goal \$ Amount	0
Goal Count	0	Goal Count	0	Goal Count	0	Goal Count	0
Stretch \$ Amount	0	Stretch \$ Amount	0	Stretch \$ Amount	0	Stretch \$ Amount	0
Stretch Count	0	Stretch Count	0	Stretch Count	0	Stretch Count	0
Appraisals		Care Plans		New Customers		Opportunities Closed Positive	
Goal \$ Amount	0	Goal \$ Amount	0	Goal Count 0		Goal \$ Amount	0
Goal Count	0	Goal Count	0	Stretch Count	0	Goal Count	0
Stretch \$ Amount	0	Stretch \$ Amount	0	New Customers Must Have Sale		Stretch \$ Amount	0
Stretch Count	0	Stretch Count	0			Stretch Count	0
					Must		

Fields and options on the Associate Goals window include:

Goal \$ Amount	The goal in dollar amount
Goal Count	The number an associate should reach for their goal
Stretch \$ Amount	The dollar amount an associate should strive to reach beyond their goal dollar amount.
Stretch Count	The number an associate should strive to reach beyond their goal amount
New Customers Must Have Sale	If checked, then that means a newly added customer must also have a completed sale instead of simply being added to Edge to count towards a set Goal.
Month/Year	Set the Month and Year for these Goals.

6. Once you have entered your desired Goals in the available fields, click **Save & Close**.



We **recommend** that once you have built **one Associate Goal** screen to completion, that you then use the **Copy To** button located on the **Goals** screen (see **step #3**) to copy those goals to your other associates.

Reporting on Associate Goals

As mentioned, there are **two options** for reporting on your associate goals.

Associate Goals Report

The Associate Goals Report works in conjunction with the Associate Goals feature to show a complete breakdown of goals for each associate.

To run the report:

1. Click **Reports > Management > Staff > Associate Goals**. The Associate Goals Find window will appear.



- 2. Choose Goal Type and Goal Status, as well as any the Date Range and Associate(s).
- 3. Choose if you would like **Stretch Goals** to display on your report and how to group your results, then click **OK**.

te Range. mis week (10/0	/2024 to 10/12/20.	24);Associates:(22) Michael 1	Weimar;Other S	elected Options:S	show Stretch	Values;	Sort By:Associate		
Associate	Period	Goal Type	Current	Goal	+/-	%	Stretch	+/-	9
Michael Weimar (22)	10/2024	\$ Items	17,400.00	4,516.13	12,883.87	385%	9,032.26	8,367.74	1
Michael Weimar (22)	10/2024	# Items	2.00	2.00	0.00	100%	3.00	-1.00	
Michael Weimar (22)	10/2024	\$ Repairs	20.00	45.16	-25.16	44%	180.65	-160.65	
Michael Weimar (22)	10/2024	# Repairs	1.00	0.00	1.00	0%	1.00	0.00	1
Michael Weimar (22)	10/2024	\$ Custom Jobs	0.00	45.16	-45.16	0%	112.90	-112.90	
Michael Weimar (22)	10/2024	# Custom Jobs	0.00	0.00	0.00	0%	0.00	0.00	_
Michael Weimar (22)	10/2024	\$ Appraisals	0.00	112.90	-112.90	0%	225.81	-225.81	
Michael Weimar (22)	10/2024	# Appraisals	0.00	0.00	0.00	0%	1.00	-1.00	_
Michael Weimar (22)	10/2024	\$ Care Plans	1,074.98	225.81	849.17	476%	451.61	623.37	2
Michael Weimar (22)	10/2024	# Care Plans	2.00	0.00	2.00	0%	1.00	1.00	2
Michael Weimar (22)	10/2024	# New Customers	1.00	1.00	0.00	100%	2.00	-1.00	
Michael Weimar (22)	10/2024	\$ Opportunities Created	3,000.00	1,129.03	1,870.97	266%	2,258.06	741.94	1
Michael Weimar (22)	10/2024	# Opportunities Created	1.00	0.00	1.00	0%	1.00	0.00	1
Michael Weimar (22)	10/2024	\$ Opportunities Closed Positive	0.00	112.90	-112.90	0%	225.81	-225.81	_
Michael Weimar (22)	10/2024	# Opportunities Closed Positive	0.00	0.00	0.00	0%	1.00	-1.00	

Commission Report

A checkbox was added to the **Commission** report to include **Associate Goals** on the report.

Sale Date A	ll Dates				•
Sold To					•
Sold By		•			
Store	- Station		Calculate Commission	Using Sale Line Cost	~
Item Number					
C	Show Margin				
6	Show Item Descript	ion			
C) Show Customer				
	Show Commission				
C] Treat Trades as Ne		ommission		6
) Multi Line Descripti				
	Count Giveaway As		ty For % Of Profit		
] Display Commissio	n %			
-	Show Cost	_			
	Show Associate Go				
] Treat \$0 Services a		ve Profit		
0] Do Not Show Service	e Profit			
C	Show All Pricing				
C) Show Discount %				
-] Must have commise				
	Use Report Criteria		age		
	Include Color On R	eports			

You **MUST** have **Commissions** set up on the Associate record for this to work. To learn more about how to set up **Commissions** for your Associates, please visit the <u>Associate Commissions</u> section of the EdgeUser knowledgebase.

Dashboards

In addition to available reports, you and your associates can track their Goals using the Dashboard feature. Setting up Dashboards for Goals works just like any other Dashboard tile setup.

For more information on creating Dashboard tiles, please visit the <u>Dashboards</u> section of the EdgeUser knowledgebase to review step by step documentation and tutorial videos.

You first select the **Tile Type**, then choose the **Data** you would like to display within your completed tile.

Gauge Tile Setup Tile Title \$ Sales by Associate (Stretch) × Data Set Associate Goals Data • Data Value To Display # Opportunities Created • # • Gauge Type Horizontal Line Monthly Goal 1 (if none exists) 5 ✓ Use Stretch Values Gaug <u>000</u> List View Save Cancel

When checking the box for **Use Stretch Values**, you will notice the **Tile Title** will **automatically** add **"(Stretch)"** to the end of your title. This is done to prevent confusion on whether the tile is displaying an **Associate Goal** or an **Associate Stretch Goal**.

MW Associate Goals			This Year 🔹 🚺 Close
\$ Opportunities Created	Goal: 20	\$ Items 27.3 % Current: \$12,285 Goal: \$45,004	# Items
\$ Repairs	# Repairs 12 Current: 4 Goal: 23 23	\$ Custom Jobs 11.71 % Current: \$750 Goal: \$6,404	# Custom Jobs 7 0 7,69 % Current: 1 Goal: 13
Appraisals	# Appraisals 10 % Current: 2 Goal: 20	\$ Care Plans 18.03 % Current: \$695 Goal: \$3,854	# Care Plans 14 Current: 5 Goal: 27 27
# New Customers	Opportunities Created 1 1 0 22504 Current: \$8,500 18.89 % Goal: \$45,00	\$ Opportunities Closed Positive 36.34 % Current: \$2,000 Goal: \$5,504	