



## Employee and Store Targets

This documentation is specific to : Telecommunications Industry

The targets module will allow the setting and tracking of targets/KPI for your Sales representatives and stores. The Targets can be set for Gross Profit for Stores and Employees AND Quantity of sales by Target Category for both Stores and sales representatives.

Ultimately provide reporting and graphs for the stores and sales representatives.

### Usage

The targets area will give you the ability to set and manage targets across multiple areas of the system. The areas you can regulate with the targets module are:

Target tracking for	Store	Employee
Gross Profit	✓	✓
Quantity of Products	✓	✓
Quantity of Plans in Plan Template	✓	✓

### Getting Started

We have included a set of new user group permissions which help regulate the access/functions of the targets module, the new user group permissions are:

<input checked="" type="checkbox"/> 5.90.000 Maintain Targets	<input checked="" type="checkbox"/> 5.90.100 Maintain Targets	5.00.000 Access the Maintenance screen
<input checked="" type="checkbox"/> Produce New Targets Reports		
<input checked="" type="checkbox"/> All Sales Reps	<input checked="" type="checkbox"/> 6.00.000 Access the Branch Level Reports Screen	
<input checked="" type="checkbox"/> All Sales Branches		
<input checked="" type="checkbox"/> Bar Graph Target Gross Profit By SalesRep(7t-1b)		
<input checked="" type="checkbox"/> Bar Graph Target Gross Profit By Store(7t-1a)		
<input checked="" type="checkbox"/> Sale Target-Store Gross Profit(7t-1)		
<input checked="" type="checkbox"/> Sale Target-SalesRep Category(7t-4)		
<input checked="" type="checkbox"/> Sale Target-SalesRep Gross Profit(7t-2)		
<input checked="" type="checkbox"/> Sale Target-Store Category(7t-3)		
<input checked="" type="checkbox"/> BarGraphTargetCategoryBySalesRep(7t-3b)		
<input checked="" type="checkbox"/> BarGraphTargetCategoryByStore(7t-3a)		

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## Creating Your Categories

Before you can start setting targets you must create your target categories. These are the categories you are going to assign to your Products and Plans in Plan Template

The target categories can be added by going to:

**Maintain → Targets → Category → Maintain Target Category**

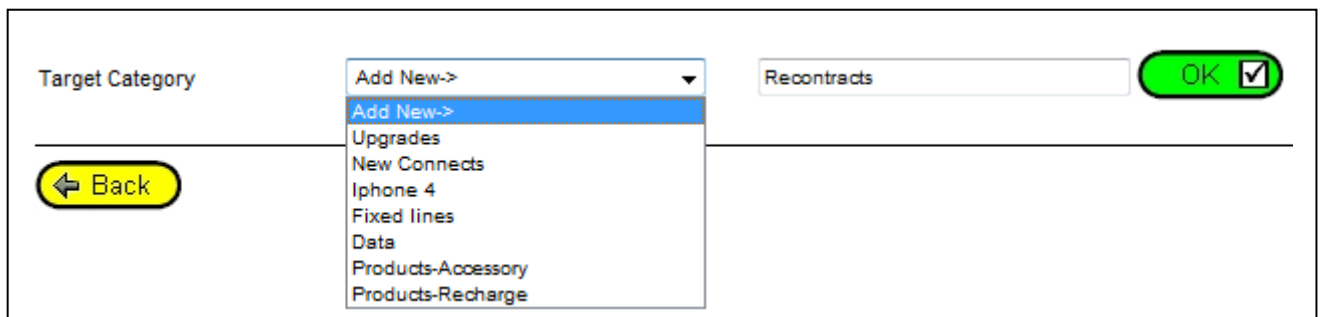
You need to add both

**Plan Category targets**, For example; New contracts, re-contracts, Data packs, Fixed Lines etc. and

**Product Categories** you wish to set targets for. That is, In accessories, the breakdown of target you wish to track For example; Accessories, Recharge, Repair services or specific items Iphone Accessories.

Please see Figure 1. (a) For an example of a Target Category.

Figure 1. (a)



The screenshot shows a web interface for creating a target category. The main label is "Target Category". Below it, a dropdown menu is open, displaying a list of categories: "Add New->", "Add New->", "Upgrades", "New Connects", "Iphone 4", "Fixed lines", "Data", "Products-Accessory", and "Products-Recharge". The text "Recontracts" is entered in the input field to the right of the dropdown. To the left of the input field is a yellow "Back" button with a left-pointing arrow. To the right is a green "OK" button with a checkmark icon.

## Assigning Categories to Your Plans

Once you have created your Target categories you have to assign them to your plans/accessories before the sales can reflect in your reports.

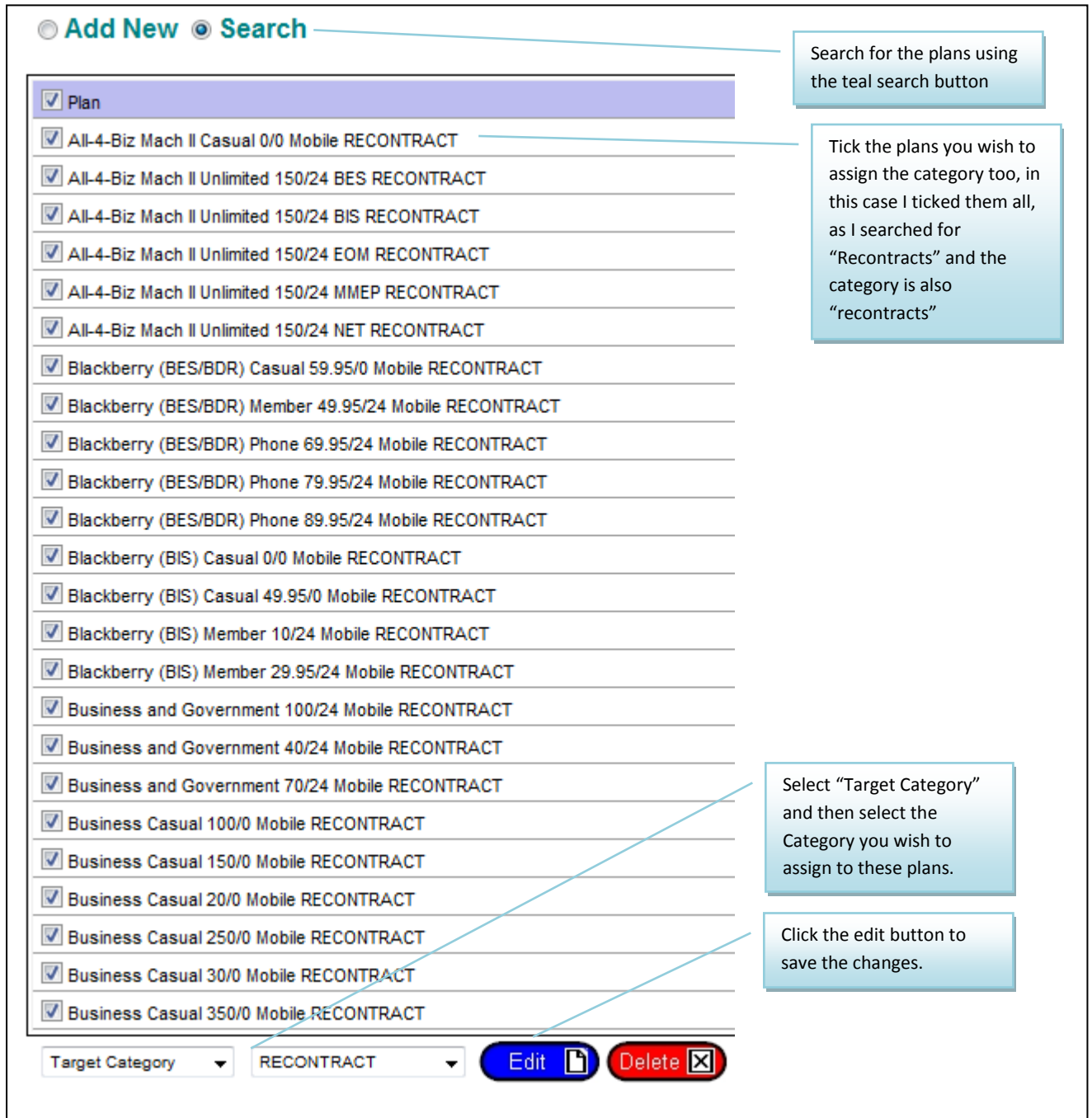
To assign categories to a specific plan type you will need to navigate to the Plan Template by going to

**Maintain → Tariff Plan → Plan Template → Search.**

You will need to search for the plans you want to assign the category to, for example, if you wished to assign a category for the amount of recontracts you do, you would search the template for "recontracts"

See Figure 2. (b) for a visual overview of assigning categories to plans.

Figure 2. (b)



Add New  Search

Plan

All-4-Biz Mach II Casual 0/0 Mobile RECONTRACT

All-4-Biz Mach II Unlimited 150/24 BES RECONTRACT

All-4-Biz Mach II Unlimited 150/24 BIS RECONTRACT

All-4-Biz Mach II Unlimited 150/24 EOM RECONTRACT

All-4-Biz Mach II Unlimited 150/24 MMEP RECONTRACT

All-4-Biz Mach II Unlimited 150/24 NET RECONTRACT

Blackberry (BES/BDR) Casual 59.95/0 Mobile RECONTRACT

Blackberry (BES/BDR) Member 49.95/24 Mobile RECONTRACT

Blackberry (BES/BDR) Phone 69.95/24 Mobile RECONTRACT

Blackberry (BES/BDR) Phone 79.95/24 Mobile RECONTRACT

Blackberry (BES/BDR) Phone 89.95/24 Mobile RECONTRACT

Blackberry (BIS) Casual 0/0 Mobile RECONTRACT

Blackberry (BIS) Casual 49.95/0 Mobile RECONTRACT

Blackberry (BIS) Member 10/24 Mobile RECONTRACT

Blackberry (BIS) Member 29.95/24 Mobile RECONTRACT

Business and Government 100/24 Mobile RECONTRACT

Business and Government 40/24 Mobile RECONTRACT

Business and Government 70/24 Mobile RECONTRACT

Business Casual 100/0 Mobile RECONTRACT

Business Casual 150/0 Mobile RECONTRACT

Business Casual 20/0 Mobile RECONTRACT

Business Casual 250/0 Mobile RECONTRACT

Business Casual 30/0 Mobile RECONTRACT

Business Casual 350/0 Mobile RECONTRACT

Target Category

Search for the plans using the teal search button

Tick the plans you wish to assign the category too, in this case I ticked them all, as I searched for "Recontracts" and the category is also "recontracts"

Select "Target Category" and then select the Category you wish to assign to these plans.

Click the edit button to save the changes.

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## Assigning Target Category to the Products

The Target Category is assigned to the Product Category.


To assign Target category, simply go to

**Stock → Product Maintain → the click on Maintain Category**

Please refer to figures 3. (a) and (b) for a visual overview of assigning categories to products.

Figure 3. (a)

**Add Edit**
 **Copy Details**
 **Search**

Date Created: 11/05/2011 


Barcode \*: ITUNERECHARGE CARD100

Sup.Prod.Code \*: ITUNERECHARGE CARD100


Manufacturer: Apple [Maintain/Ma](#)


Product Name \*: \$100 iTunes Recharge Card

Description: Redemmed for \$100 of value in the iTu


Colour: 

Category \*: Recharge Card (Recharge Cards) [Maintain Category](#) [Maintain Master Category](#)

Contract period:  [Maintain Contract period](#)


Amount:  [Maintain Amount](#)

Supplier \*: EPAY [Maintain Supplier](#)

PAN: 

Select "Maintain Category" to assign the Target Category to the Product Category.

Figure 3. (b)


Master Cat: Recharge Cards 

AccountRef: Recharge Cards [Maintain Account Ref](#)

Category: Recharge Card [Maintain Min Max Wizard](#)

Target Category: RECONTRACT [Maintain Target Category](#)

Tax %: 0

Bitmap Location for EPAY: 

Include In loyalty offer:  Min purchase prior to applying Loyalty/Discount: 10 Loyalty/Discount %: 10

Include In daily Reconcile:

File Name	Description	File Size	Date/Time Uploaded
No Record Found			
0 item(s)		0	<a href="#">Insert File</a>
Quota Used: 13.57% 1422701 Bytes Used, 9083059 Bytes Free, 10485780 Bytes Total			

Category	Master Cat	Tax %	AccountRef	Target Category
<input type="checkbox"/> <a href="#">Recharge Card</a>	Recharge Cards	0	Recharge Cards	Recharge Cards

If you have existing product categories, simply select The Product Category you wish to assign the Target Category to.

Then select "Target Category" You wish to assign to the accessory.

Press "OK" to save your changes.



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## Setting Targets | Category

Once you have assigned your desired categories to your products and plans, you will be able to set the Targets for those categories. You will need to navigate to the Targets area by going to

**Maintain → Targets → Category → And then select the month/year you wish to set Targets for.**

Clicking "OK" will take you to the Target setting screen, from there you can set targets at the branch level and sales rep level. Please view Figures 4. for a visual overview of setting branch and sales rep Targets for categories.

Figure 4. (a)

**Targets**

Gross Profit | **Category**

[Maintain Target Category](#)

Create target for new month  Year

Copy Target From  To

Edit Target for

Select Month  
 Select Month  
 January  
 February  
 March  
 April  
 May  
 June  
 July  
 August  
 September  
 October  
 November  
 December

Select the month you wish to set targets for.

Type the year you wish to set targets for. Then click "OK" to proceed

Figure 4. (b)

**Targets**

Gross Profit | **Category**

[Maintain Target Category](#)

Create target for new month  Year

Copy Target From  To

Edit Target for

Branch Profile	Store	Target Category	Target Quantity	Notes
Superstore	<a href="#">Head Office</a>	RECONTRACT	<input type="text" value="2000"/>	<input type="text"/>
Just Comm	<a href="#">Melbourne</a>	RECONTRACT	<input type="text" value="0"/>	<input type="text"/>
<b>Total</b>			<b>2000</b>	

You will need to enter the target quantity for your desired branches.

Clicking on a branch will allow you to set targets for your sales reps.



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## Head Office [May 2011]

User Group	Employee	Target Category	Target Quantity	Notes
Administrator	Adam N	RECONTRACT	<input type="text" value="5"/>	
Administrator	Ali Muha	RECONTRACT	<input type="text" value="5"/>	You will need to enter the target quantity for sales reps
Administrator	Ariel Berg	RECONTRACT	<input type="text" value="5"/>	
Administrator	Bernice Fassom	RECONTRACT	<input type="text" value="5"/>	
Administrator	Bill Bixby	RECONTRACT	<input type="text" value="5"/>	
Administrator	Chi Quan	RECONTRACT	<input type="text" value="5"/>	
Administrator	Darren Cardarelli	RECONTRACT	<input type="text" value="5"/>	
Store Rep	Don King	RECONTRACT	<input type="text" value="5"/>	
Administrator	Ishari Piyumsiri	RECONTRACT	<input type="text" value="5"/>	
Administrator	John Citizen	RECONTRACT	<input type="text" value="5"/>	
Administrator	John Smith	RECONTRACT	<input type="text" value="5"/>	
Administrator	John Walters	RECONTRACT	<input type="text" value="5"/>	Click Apply to save your changes.
Administrator	Kumar John	RECONTRACT	<input type="text" value="5"/>	
Administrator	Mike King	RECONTRACT	<input type="text" value="5"/>	
Store Rep	Nadia Poulouse	RECONTRACT	<input type="text" value="5"/>	
	Stocktake	RECONTRACT	<input type="text" value="5"/>	
	<b>Total</b>		<b>80</b>	



## Setting Targets | Gross Profit

The other type of targets you can set are Gross Profit targets, you can set a target amount of gross profit for your branches, sales reps, or both. You will need to navigate to the Targets area by going to **Maintain → Targets → Gross Profit → And then select the month/year you wish to set Targets for.** Clicking “OK” will take you to the Target setting screen, from there you can set targets at the branch level and sales rep level. Please view Figures 5. for a visual overview of setting branch and sales rep Targets for gross profit.

Figure 5. (a)

**Targets**

Gross Profit Category

Create target for new month: May Year: 2011 OK

Copy Target From: Select Month/Year To: Select Month/Year OK

Edit Target for: Select Month/Year

Figure 5. (b)

**Targets**

Gross Profit Category

Create target for new month: Select Month Year: To: \$

Copy Target From: Select Month/Year To: \$

Edit Target for: May 2011

OK   
OK

Branch Profile	Store	Monthly Target Amount	Monthly Total Expense	Notes
Superstore	<a href="#">Head Office</a>	\$ 20000.00	\$ 4000.00	
Just Comm	<a href="#">Melbourne</a>	\$ 13000.00	\$ 2500.00	
Total		\$0.00	\$0.00	

Apply  Delete



Figure 5. (a)

Head Office [May 2011]				
User Group	Employee	Monthly Target Amount	Monthly Total Expense	Notes
Administrator	Adam N	\$ 2000.00	\$ 266.60	
Administrator	Ali Muha	\$ 2000.00	\$ 266.60	
Administrator	Ariel Berg	\$ 2000.00	\$ 266.60	
Administrator	Bernice Fassom	\$ 2000.00	\$ 266.60	
Administrator	Bill Bixby	\$ 2000.00	\$ 266.60	
Administrator	Chi Quan	\$ 2000.00	\$ 266.60	
Administrator	Darren Cardarelli	\$ 2000.00	\$ 266.60	
Store Rep	Don King	\$ 2000.00	\$ 266.60	
Administrator	Ishari Piyumsiri	\$ 2000.00	\$ 266.60	
Administrator	John Citizen	\$ 2000.00	\$ 266.60	
Administrator	John Smith	\$ 2000.00	\$ 266.60	
Administrator	John Walters	\$ 2000.00	\$ 266.60	
Administrator	Kumar John	\$ 2000.00	\$ 266.60	
Administrator	Mike King	\$ 2000.00	\$ 266.60	
Store Rep	Nadia Poulouse	\$ 2000.00	\$ 266.60	
	Stocktake	\$ 2000.00	\$ 266.60	
	<b>Total</b>	<b>\$32000.00</b>	<b>\$4265.60</b>	

You will need to enter the target amount as well as the monthly expense for your sales reps.

Click Apply to save your changes.

Apply





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## Reporting

To coincide with the new Targets module, we have also created a new set of reports to reflect your performance/progress in achieving your targets. They can be accessed by going to **Reports → Performance →** And then select the type of target you want to report on. (See Figure 6)

Figure 6.

**Performance Report**

Sales Performance
  Target Performance
  Target Category Performance

Date From: 12/05/2011 To: 12/05/2011

Select Report: by Branch Type: Sale Value

OK

“Target Performance” will report on Gross Profit.

“Target Category Performance” will report on your set target categories..

Figure 6. (b)

Sales Performance
  Target Performance
  Target Category Performance

Date: May 11

Select Report: Target Gross Profit By Store(7t-1)

OK

Please select branches

Head Office (310)  Melbourne (320)

Tick the branches that you want to report on.

You need to select the month/year you want to report on, as well as the type of report you want to run

## Reporting | Target Category Performance

You can report on your target categories in the form of both a standard report, and a bar graph. They can be accessed by going to Reports → Performance → And selecting “Target Category Performance” See Figure 7 (a) and (b)

Figure 7. (a) – Target Category By Store.

**Target Category By Store(7t-3)**

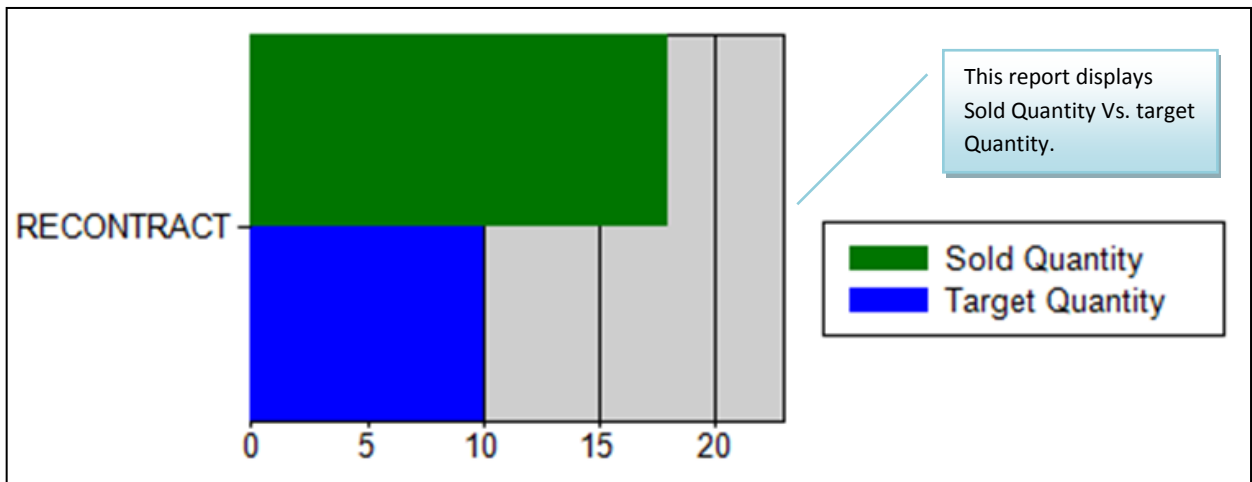
	RECONTRACT		Total	
	Sold	Target	Sold	Target
<a href="#">Head Office</a>	8	10	8	10
<a href="#">Melbourne</a>	2	5	2	5
<a href="#">Total</a>	10	15	10	15

Clicking on a branch will give you a list of reps targets.

The total for your branches are displayed here.

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Figure 7. (b) – Bar Graph Target category by Store.



## Reporting | Target Category Performance

You can report on your gross profit targets in the form of both a standard report, and a bar graph. They can be accessed by going to Reports → Performance → And selecting “Target Performance” See Figure 8 (a) and (b)

Figure 8. (a) Target Gross Profit By Store.

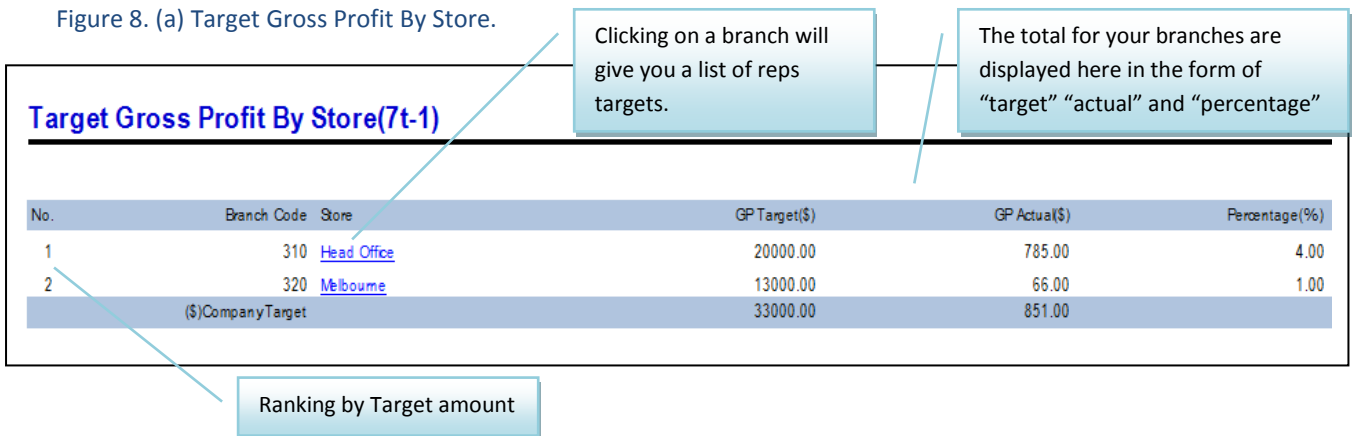
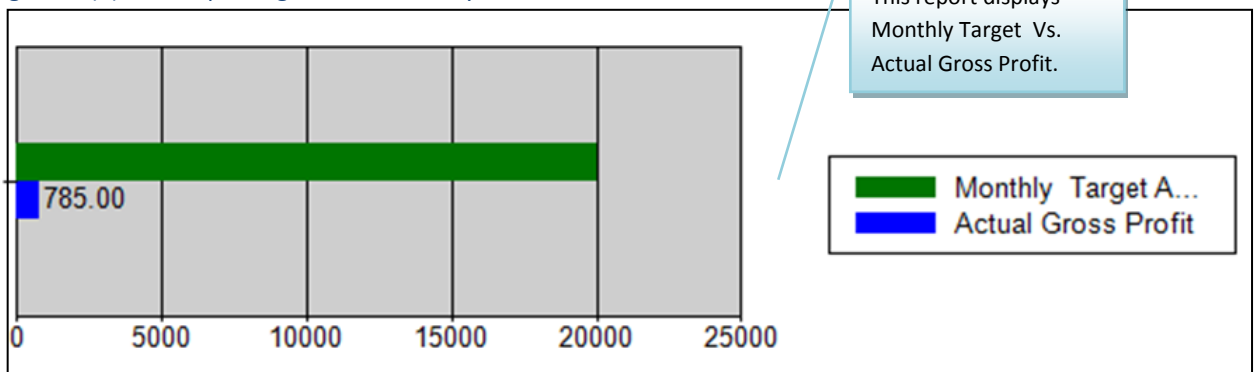


Figure 8. (b) Bar Graph Target Gross Profit By Store.





## Additional help.

The ClickPOS team is happy to assist you in further understanding this feature, or any other area of the system, simply contact us via [help@clickpos.com](mailto:help@clickpos.com)