



## Employee & Store Targets

This guide is to will show how to

- View Employee Performance reports without setting targets
- How to set targets for a particular month for Gross Profit and Number of Plans Sold
- Both reports populate sales count based on store or employee grouped by Plan target categories, ultimately allows you to see if employees are reaching their targets.

ClickPOS™



# Target tracking for Vodafone users

ClickPOS includes Store and Employee targets, offering centralised categories updated automatically for sales reports, and for you to add targets for tracking purpose.

The Targets can be added for two sections

1. Gross Profit for Store and employee - Add a \$ amount per store or employee to see if they are achieved by end of month.
2. Number of Plans sold by Target category for Store and Employee

We have setup the Plan targets categories, however you need to add the actual targets for store or employee. The good news is you can see the sales counts without having to add Targets, see below for more information.

## About this guide

This guide will show you how to

1. View **Performance Report without setting targets.**
2. And for those that want to add targets, **how to set the targets for a particular month** for
  - a. **Gross profit target** and
  - b. **Number of Plans Sold target** so you can see month to month if the store or employee is achieving those set targets.

## Performance reports without targets

You may view the currently set category reports without setting the employee or store targets. The reports are available to you now, because we have already entered some target categories alongside each plan in the plan template.

To view Reports go to

**Reports > Performance > Target Category Performance**

The screenshot shows the ClickPOS interface with a navigation menu (Home, Sale, Stock, Repairs, Reports, Accounts) and a 'Performance Report' section. The 'Target Category Performance' radio button is selected. The 'Date From' field is set to 1/07/201 and 'To' to 1/08/201. The 'Select Report' dropdown is set to 'CategoryByStore(7t-3c)'. There is an 'OK' button and a list of branches: 'Please select branches', 'Vodafone Melbourne (300)', and 'Vodafone Sydney (200)' (checked). Three blue callout boxes on the right point to the 'Reports > Performance > Target Category Performance' breadcrumb, the 'Target Category Performance' radio button, and the 'CategoryByStore(7t-3c)' dropdown.

Select Target Category Performance

Select Date Range and Category By Store (7t-3c)

Select Stores and click OK

Below are the two reports available.

## Performance Report - Category By Store (7t-3c)

the Store totals of all sales under Plan Template Target categories

This report displays all the selected stores and quantity of sales made under target categories pre-set in plan template. You may now drill down by clicking each store name to see the employee sales.

**Click on store name to Drill down to Employees**

https://tcpsvr91.clickpos.net/?fromdate=1/07/2019 Explorer

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1 of 1 100% Find | Next Select a format Export

Vodafone  
Date From: 1/07/2019 Date To: 1/08/2019  
**CategoryByStore(7t-3c)**

	APP	Insurance	NBN	NEW Handset	NEW MBB Device	NEW MBB SIMO	NEW SIMO	Norton	P2P Handset	P2P SIMO	Prepaid MBB Device	Prepaid MBB SIMO	Prepaid Voice Device	Prepaid Voice SIMO	UPG Handset	UPG MBB Device	UPG MBB SIMO	UPG SIMO	Total
Vodafone Melbourne	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold
	53	24	3	24	5	4	50	0	1	1	0	0	0	0	28	0	0	23	216
<b>Total</b>	<b>53</b>	<b>24</b>	<b>3</b>	<b>24</b>	<b>5</b>	<b>4</b>	<b>50</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>28</b>	<b>0</b>	<b>0</b>	<b>23</b>	<b>216</b>

Execution Time: 0 seconds  
Report powered by [www.clickpos.com](http://www.clickpos.com)

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## Employee Performance – Sales grouped by Plan Categories.

Below is all employees with quantity of items SOLD, grouped by plan target categories.

**Click on store name to Drill down to Employees**

https://tcpsvr91.clickpos.net/?fromdate=1%2f07%2f2019&toDate=1%2f08%2f2019&checked=true&rptName= Internet Explorer

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1 of 1 100% Find | Next Select a format Export

Vodafone  
Date From: 1/07/2019 Date To: 1/08/2019  
**CategoryByStore(7t-3c)**

	APP	Insurance	NBN	NEW Handset	NEW MBB Device	NEW MBB SIMO	NEW SIMO	Norton	P2P Handset	P2P SIMO	Prepaid MBB Device	Prepaid MBB SIMO	Prepaid Voice Device	Prepaid Voice SIMO	UPG Handset	UPG MBB Device	UPG MBB SIMO	UPG SIMO	Total
Vodafone Melbourne	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold	Sold
Aby Goodner	3	0	1	2	0	0	11	0	0	0	0	0	0	0	2	0	0	0	22
Alex Chan	7	2	1	3	0	0	6	0	0	0	0	0	0	0	3	0	0	1	23
John Stanos	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	0	0	0	2
Sann tracter	5	4	0	2	0	0	8	0	0	0	0	0	0	0	3	0	0	0	28
Raj Sharma	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tammy smith	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Tom smith	18	4	0	7	1	2	15	0	0	1	0	0	0	0	9	0	0	4	61
Oscar wild	13	9	0	4	1	0	8	0	0	0	0	0	0	0	6	0	0	4	45
Peter Smyth	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Robert Gomez	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ryner Heart	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sam.Irwin	7	5	1	6	3	2	1	0	0	0	0	0	0	0	4	0	0	5	34
<b>Total</b>	<b>53</b>	<b>24</b>	<b>3</b>	<b>24</b>	<b>5</b>	<b>4</b>	<b>50</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>28</b>	<b>0</b>	<b>0</b>	<b>23</b>	<b>216</b>

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## Setting STORE and EMPLOYEE Targets

Next level is to set targets for stores and/or Employees

You have options of setting either Store and/or Employee targets for Gross Profit and/or Number of Plans Sold.

### How to set Targets

To view the PLAN CATEGORY reports you first must set the target month. The targets are tracked by month to month, so before each month you need to set the target. For the first month, use the **Create target for new month**, To do this go to

### Maintain > Targets > Category Tab

Select the Month from drop down,  
Enter the current year then OK

Select Category to view Plan Categories

Select future MONTH and Enter current YEAR

Then click OK to save

The following months, you simply Create the month, then use the Copy Target From, option to grab details of the previous months' targets, to copy to the next month. Then make changes to the expected target month as you see fit.

### Adding STORE Targets – Plan Count

By adding store targets, the report will display actual sales vs the targets you set for each Plan category. The report will count any sale made under the category and display the results for the selected store.

To add store targets for Plan count, simply select the month along "Edit Target For"  
And system will display the Categories for the store.

Now add the count quantity of targets for each plan category, then OK to save

NOTE: if you just want to keep track of employee targets, then you can skip this section and go straight to Employee. Simply Click on any of the Store Name in the list.

Branch Profile	Store	Target Category	Target Quantity	Notes
Standard Vodafone Melbourne		NEW SIMO	10	
Standard Vodafone Melbourne		NEW Handset	10	
Standard Vodafone Melbourne		NEW MBB SIMO	120	
Standard Vodafone Melbourne		UPG SIMO	0	
Standard Vodafone Melbourne		UPG Handset	0	
Standard Vodafone Melbourne		UPG MBB SIMO	0	
Standard Vodafone Melbourne		P2P SIMO	0	
Standard Vodafone Melbourne		Prepaid Voice SIMO	0	
Standard Vodafone Melbourne		Prepaid MBB SIMO	0	
Standard Vodafone Melbourne		NBN	0	
Standard Vodafone Melbourne		APP	0	
Standard Vodafone Melbourne		Insurance	0	
Standard Vodafone Melbourne		Norton	0	
Standard Vodafone Melbourne		P2P Handset	0	

## Adding EMPLOYEE Targets – Plan Count

In extending the option above, simply click on any Store name to go into the Employee List to set targets. Below shows all the employees working under in that branch.

Add the Target quantity for each plan category, and make your way down the list to do the same for each employee.

**Targets**

Gross Profit | Category

Vodafone [August 2019]

User Group	Employee	Target Category	Target Quantity	Notes
Store Manager	Abby Goodman	NEW SIMO	5	
Store Manager	Abby Goodman	NEW Handset	10	
Store Manager	Abby Goodman	NEW MBB SIMO	1	
Store Manager	Abby Goodman	UPG SIMO	4	
Store Manager	Abby Goodman	UPG Handset	5	
Store Manager	Abby Goodman	UPG MBB SIMO	1	
Store Manager	Abby Goodman	P2P SIMO	1	
Store Manager	Abby Goodman	Prepaid Voice SIMO	8	

Now add the count quantity of targets for each plan category, then OK to save

## Performance Reports with TARGETS

Once Targets are set, its time to follow the reports. To view the reports go to

Reports > Performance > Target Category Performance

Click POS | Home | Sale | Stock | Repairs | Reports

**Performance Report**

Sales Performance
  Target Performance
  Target Category Performance

Date From: August 2019

Select Report: Target Category By Store(7t-3)

OK

Please select branches

Vodafone Docklands (300)
  Vodafone Flinders (303)

Select Target Category Performance

Select Month Year,

Select report Category By Store (7t-3)

Select Stores and click OK

Below is the final report that shows both sales and Targets, with totals on both sides.

Navigation bar with page number 1 of 1 and zoom level 100%.

Date From: 1/08/2019 Date To: 31/08/2019

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

		APP		Insurance		NBN	
		Sold	Target	Sold	Target	Sold	Target
Vodafone	Abby Goodmar	0	13	0	16	0	5
Melbourne	Alex Chan	0	13	0	16	0	5
	John Stanos	0	13	0	16	0	5
	Sam tracker	0	13	0	16	0	5

Targets set for each employee

NOTE: To view details of sales, there must be Sales transactions

# User Group Permissions

## Before you begin

You may not have access to the maintenance of Targets, so as an administrator, you need to tick the access permission, Go to Maintain > System Admin > User group permission > Select User Group as “Administrator”, then Edit

Then click on **Expand / Collapse All** , then go down the list to TICK the

5.90.000 Access Maintain Target Screen

Then check if you have permissions to View the **Target Performance Reports**

Produce New Targets Reports

All Sales Reps

All Sales Branches

Bar Graph Target Gross Profit By SalesRep(7t-1b)

Bar Graph Target Gross Profit By Store(7t-1a)

Sale Target-Store Gross Profit(7t-1)

Sale Target-SalesRep Category(7t-4)

Sale Target-SalesRep Gross Profit(7t-2)

Sale Target-Store Category(7t-3)

BarGraphTargetCategoryBySalesRep(7t-3b)

BarGraphTargetCategoryByStore(7t-3a)

CategoryByStore(7t-3c)

## Do you want Employees to view Target Reports?

If you want employees to see the Targets Performance Reports, then you need to tick the permissions for each User Group as well.

To do this Select Each user group, User Group as “Sales Reps, Store managers etc”, then Edit

Then click on **Expand / Collapse All** ,

then go down the list to TICK one or more of the reports. The above examples deals mainly with 7tC.

The option of **ALL Sales Reps** is a toggle, if unticked, shows Only the reps name that has logged in, If Ticked shows All the sales reps performance and Same with the Branch tick.

Produce New Targets Reports

All Sales Reps

All Sales Branches

Bar Graph Target Gross Profit By SalesRep(7t-1b)

Bar Graph Target Gross Profit By Store(7t-1a)

Sale Target-Store Gross Profit(7t-1)

Sale Target-SalesRep Category(7t-4)

Sale Target-SalesRep Gross Profit(7t-2)

Sale Target-Store Category(7t-3)

BarGraphTargetCategoryBySalesRep(7t-3b)

BarGraphTargetCategoryByStore(7t-3a)

CategoryByStore(7t-3c)