

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

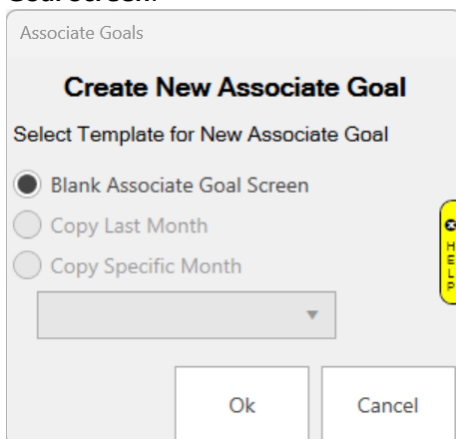
A new **Goals** tab was added to the **Associate** record that allows you to **manage Goals** in one location. Here you can **view** all the **goals** for your selected associate, as well as **add** new goals, **edit** existing goals, and **delete goals** and are available for **Service Jobs, Care Plans, 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.

4. 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.

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.

- 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**.

Associate Goals Report 10/7/2024
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Date Range: This Week (10/6/2024 to 10/12/2024); Associates: (22) Michael Weimar; Other Selected Options: Show Stretch Values; Sort By: Associate;

Associate	Period	Goal Type	Current	Goal	+/-	%	Stretch	+/-	%
Michael Weimar (22)	10/2024	\$ Items	17,400.00	4,516.13	12,883.87	385%	9,032.28	8,367.74	193%
Michael Weimar (22)	10/2024	# Items	2.00	2.00	0.00	100%	3.00	-1.00	67%
Michael Weimar (22)	10/2024	\$ Repairs	20.00	45.16	-25.16	44%	180.65	-160.65	11%
Michael Weimar (22)	10/2024	# Repairs	1.00	0.00	1.00	0%	1.00	0.00	100%
Michael Weimar (22)	10/2024	\$ Custom Jobs	0.00	45.16	-45.16	0%	112.90	-112.90	0%
Michael Weimar (22)	10/2024	# Custom Jobs	0.00	0.00	0.00	0%	0.00	0.00	0%
Michael Weimar (22)	10/2024	\$ Appraisals	0.00	112.90	-112.90	0%	225.81	-225.81	0%
Michael Weimar (22)	10/2024	# Appraisals	0.00	0.00	0.00	0%	1.00	-1.00	0%
Michael Weimar (22)	10/2024	\$ Care Plans	1,074.98	225.81	849.17	478%	451.61	623.37	238%
Michael Weimar (22)	10/2024	# Care Plans	2.00	0.00	2.00	0%	1.00	1.00	200%
Michael Weimar (22)	10/2024	# New Customers	1.00	1.00	0.00	100%	2.00	-1.00	50%
Michael Weimar (22)	10/2024	\$ Opportunities Created	3,000.00	1,129.03	1,870.97	266%	2,258.06	741.94	133%
Michael Weimar (22)	10/2024	# Opportunities Created	1.00	0.00	1.00	0%	1.00	0.00	100%
Michael Weimar (22)	10/2024	\$ Opportunities Closed Positive	0.00	112.90	-112.90	0%	225.81	-225.81	0%
Michael Weimar (22)	10/2024	# Opportunities Closed Positive	0.00	0.00	0.00	0%	1.00	-1.00	0%

+/- Color Key: 150%+ over goal
Up to 150% over goal

Commission Report

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



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 [Associate Commissions](#) 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 [Dashboards](#) 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.



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**.

