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Adding a KPI to an Employee



Ross Medina

2 years ago · Updated

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To access the following instructions, User must have, at least, Store Manager level credentials.

To make a KPI report available to specific employees,

1. Open the Employee module, locate the Employee whom you wish to add a report to and open his profile by clicking on his/her name.

EMPLOYEE

Store: All Departments: All Status: active Add New Employee

Name	Store	Department	Email	Phone
Alber, Bill	Presidio	Office		
Baversjo, Johan				
Book, Face				
Caraballo, Giovanni	Presidio	Delivery		
Elfgrén, Sven	Presidio	Office		
Heywood, Vance	Balboa	Delivery		
Lee, P	Presidio	Pressing and Touch-up		
Lyrén, Adam	North Beach	Customer Service		
Martin, Kelly	North Beach	Customer Service		
Medina, Ross	Presidio	Customer Service	rossmedina@gmail.com	4158024888
Medina, Jose	Presidio	Customer Service		
Medina, Nery	Presidio	Pressing and Touch-up		
Moller, Filip Erik	Balboa	Delivery		
Muoi, Phan	Presidio	Pressing and Touch-up		
Nye, Josh	North Beach	Customer Service		
Park, Kim	Presidio	Customer Service		
Park, Mike	Presidio	Customer Service		
Silva, Karina	Balboa	Assembly		

2. Click on the Admin tab within the Employee profile. Locate the Custom KPIs field and click on it.

EMPLOYEE

Back to list

Ross Medina (ross)

Home Cell 4158024888 Email rossmedina@gmail.com

Profile Admin Edit Employee

Settings

First Name Ross

Last Name Medina

Level Admin

Pay Rate 0.00

Payment Type per_hour

Store Presidio

Departments Customer Service

Remote Access ☒

Change Badge (AZ)

Visible agents

Select one or more agents

Custom KPIs

Select one or more KPIs

Notes

Comments

Save Cancel

3. A list will expand displaying all the KPI reports, click on the one(s) you want to add to this User. As you add them, these will show highlighted in blue, to remove them, click on the "x" next to the highlighted report. You can also type the name of the KPI to filter the results.

The screenshot shows the 'EMPLOYEE' management page for Ross Medina. The 'Edit Employee' form is active, displaying fields for First Name (Ross), Last Name (Medina), Level (Admin), Pay Rate (0.00), Payment Type (per_hour), Store (Presidio), and Departments (Customer Service). The 'Visible agents' dropdown menu is open, showing a list of KPIs. A red box highlights the dropdown menu, and a red arrow points to the 'Promised Today' option.

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