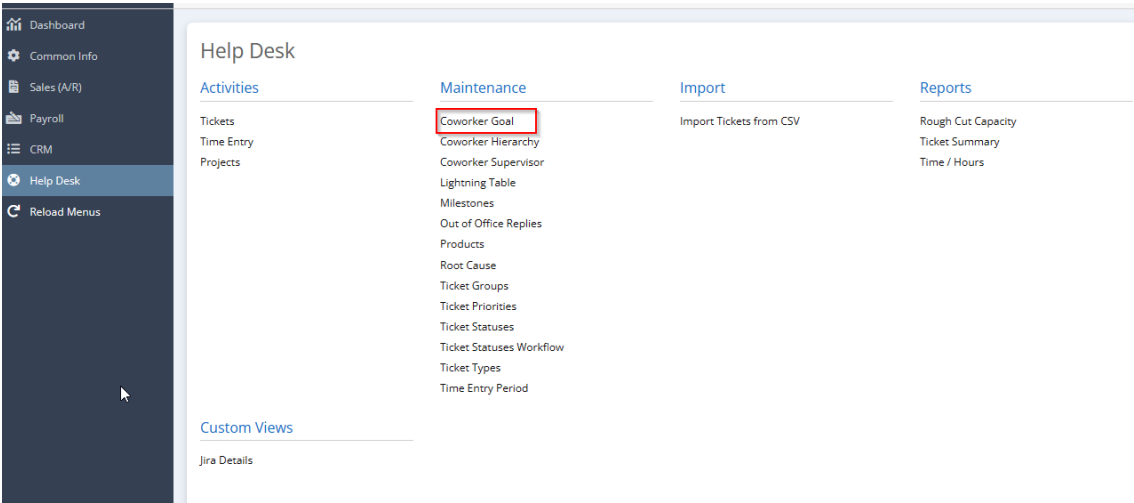


Setting up coworker goals

Steps to setup coworker goals:

- Go to Help Desk> Coworker Goals



- To add a new coworker goal, click New
- Choose agent name, 'reports to', fiscal year, currency, commission account, revenue account, commission type, commission rate type, commission rate, incentive type, incentive rate type, incentive rate

A screenshot of a 'Coworker Goal - Details' form. The form has tabs for 'Details', 'Annual Goal', 'Attachments', and 'Audit Log'. The 'Details' tab is active. It contains several fields for configuration: 'User' (with a dropdown arrow), 'Reports To' (with a dropdown arrow), 'Fiscal Year' (with a dropdown arrow), 'Currency' (with a dropdown arrow), 'Commission Account' (text input), 'Revenue Account' (text input), 'Commission Type' (dropdown menu), 'Commission Rate Type' (dropdown menu), 'Commission Rate' (text input), 'Incentive Type' (dropdown menu), 'Incentive Rate Type' (dropdown menu), and 'Incentive Rate' (text input). Below these are 'Utilization Target Annual %', 'Utilization Target Weekly %', and 'Utilization Target Monthly %' (all text inputs). There are also checkboxes for 'Active' and 'Can View Other Coworker'. At the bottom, there is a 'Billing Period' section with an 'Export' button, a 'View' dropdown, and a 'Filter (F3)' button. Below this is a table with columns: 'Billing Period', 'Billing Period Name', 'Budget (FN)', and 'Utilization %'. The table has three rows, each with a checkbox in the first column and values in the others.

- Input utilization % target annually, monthly, weekly; input annual hurdle (FN), annual budget (fn)

Coworker Goal - [Name] 2023

New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

User: [Name] Commission Type: Hourly no hurdle

Reports To: [Name] Commission Rate Type: Flat Amount

Fiscal Year: 2023 Commission Rate: 100.00

Currency: PHP Incentive Type: []

Commission Account: 8067-620 Incentive Rate Type: []

Revenue Account: 8067-630 Incentive Rate: 0.00

Utilization Target Annual %: 20 Annual Hurdle (FN): 100,000.00

Utilization Target Weekly %: 20 Annual Budget (FN): 150,000.00

Utilization Target Monthly %: 20 Under Allocated (FN): 150,000.00

Active: ☒ Can View Other Coworker: ☐

Billing Period

Export View Filter (F3)

Billing Period	Billing Period Name	Budget (FN)	Utilization %
1	Week 1	0.00	0.00
2	Week 2	0.00	0.00

- Tick if active user (this will indicate if the coworker is required to login their time)

Coworker Goal - [Name] 2023

New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

User: [Name] Commission Type: Hourly no hurdle

Reports To: [Name] Commission Rate Type: Flat Amount

Fiscal Year: 2023 Commission Rate: 100.00

Currency: PHP Incentive Type: []

Commission Account: 8067-620 Incentive Rate Type: []

Revenue Account: 8067-630 Incentive Rate: 0.00

Utilization Target Annual %: 20 Annual Hurdle (FN): 100,000.00

Utilization Target Weekly %: 20 Annual Budget (FN): 150,000.00

Utilization Target Monthly %: 20 Under Allocated (FN): 150,000.00

Active: ☒ Can View Other Coworker: ☐

Billing Period

Export View Filter (F3)

Billing Period	Billing Period Name	Budget (FN)	Utilization %
1	Week 1	0.00	0.00
2	Week 2	0.00	0.00

- Tick if can view other coworker's time entries (This is for admin view. To be able to review the other time entries of the coworkers)

Coworker Goal - [Name] 2023

New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

User: [Name] Commission Type: Hourly no hurdle

Reports To: [Name] Commission Rate Type: Flat Amount

Fiscal Year: 2023 Commission Rate: 100.00

Currency: PHP Incentive Type: []

Commission Account: 8067-620 Incentive Rate Type: []

Revenue Account: 8067-630 Incentive Rate: 0.00

Utilization Target Annual %: 20 Annual Hurdle (FN): 100,000.00

Utilization Target Weekly %: 20 Annual Budget (FN): 150,000.00

Utilization Target Monthly %: 20 Under Allocated (FN): 150,000.00

Active: ☒ Can View Other Coworker: ☐

Billing Period

Export View Filter (F3)

Billing Period	Billing Period Name	Budget (FN)	Utilization %
1	Week 1	0.00	0.00
2	Week 2	0.00	0.00

- Input detailed budget per period and utilization % per period

Coworker Goal - Diane Diaz - 2023

New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

User: **Diane Diaz** Commission Type: Hourly no hurdle
 Reports To: **George Olney** Commission Rate Type: Flat Amount
 Fiscal Year: **2023** Commission Rate: 100.00
 Currency: **PHP** Incentive Type:
 Commission Account: 8067-620 Incentive Rate Type:
 Revenue Account: 8067-630 Incentive Rate: 0.00
 Utilization Target Annual %: 20 Annual Hurdle (FN): 100,000.00
 Utilization Target Weekly %: 20 Annual Budget (FN): 150,000.00
 Utilization Target Monthly %: 20 Under Allocated (FN): 150,000.00
 Active: ☒ Can View Other Coworker: ☐

Billing Period

Export View Filter (F3)

Billing Period*	Billing Period Name*	Budget (FN)	Utilization %
<input type="checkbox"/> 1	Week 1	0.00	0.00
<input type="checkbox"/> 2	Week 2	0.00	0.00
<input type="checkbox"/> 3	Week 3	0.00	0.00
<input type="checkbox"/> 4	Week 4	0.00	0.00

- Type detailed annual goal in 'Annual goal' tab

Coworker Goal - Diane Diaz - 2023

New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

Goal

B i U A: A [Rich Text Editor Icons]

Annual goal

- Upload attachments (If there are other coworker goals attachments)

Coworker Goal - Diane Diaz - 2023

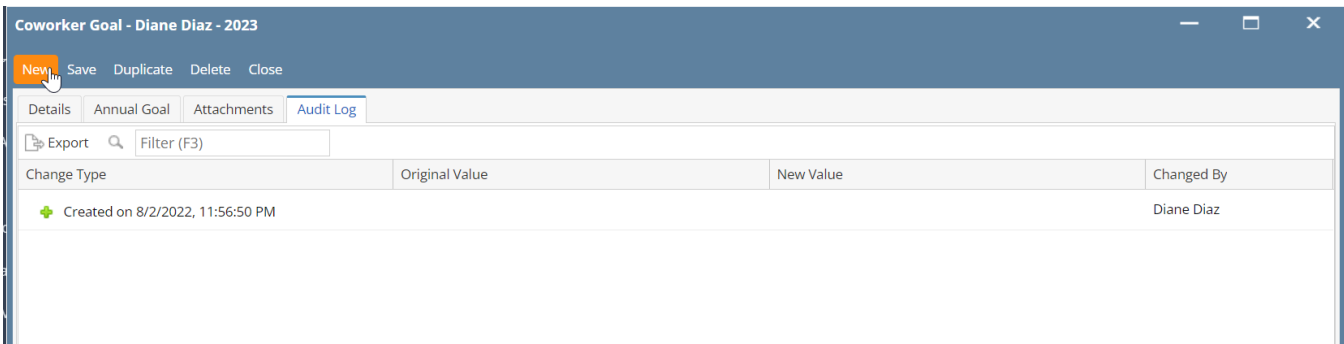
New Save Duplicate Delete Close

Details Annual Goal Attachments Audit Log

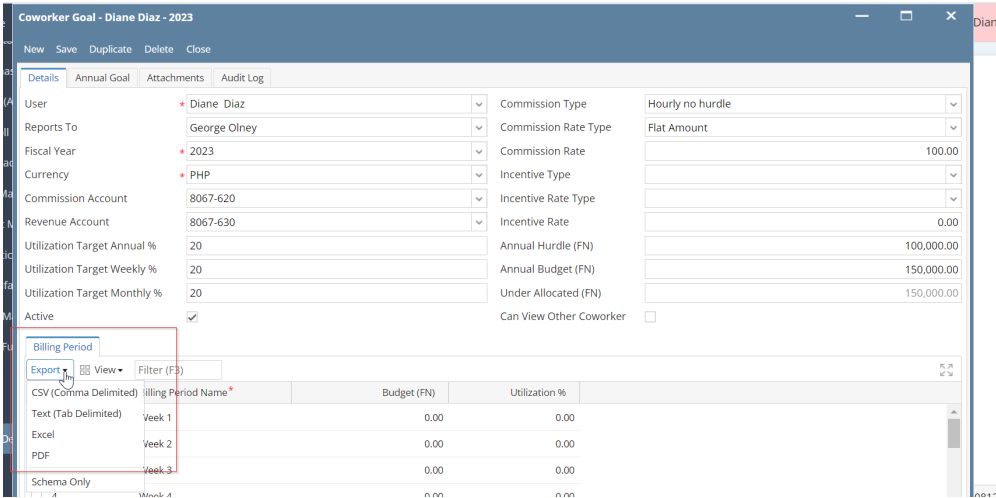
+ Add Files Preview Edit Download Delete Export View Filter (F3)

Name	Type	Size	Date Added	Comment	User
------	------	------	------------	---------	------

- See audit logs



- Export detailed coworker goals per period of a coworker



- Should be able to bulk upload coworker goals through a csv template

