

**KPI – Clients By Sales**

COATS Metrics -- Key Clients

ClientsStaffersStaffer Contacts

Client Name	Client...	Region	Branch	Sales Person	To...	COI	COI Fu...	ACC	Termin...	% Termi...	New SE...	Net Ch...	% Cha...	Jobs O...	New J...	Emp...	Emp H...	Still N...	Jobs Cl...	Jobs F...	Submittals	
21ST REMODELING, INC.	...	3	EAST COAST	VA Beach	DEMO	253	217	0	1	36	14.23	3	-33.00	-13.04	9	3	43	7	36	0	7	5
711 MANUFACTURING	...	124	WEST COAST	Phoenix	KAREN	3	3	0	0	0	0.00	0	0.00	0.00	1	0	2	2	0	0	0	0
TELEVEN	...	19	EAST COAST	VA Beach	DEMO	19	18	0	0	1	5.26	0	-1.00	-5.26	5	0	11	7	4	0	0	1
ABC CATERING SERVICES	...	25	EAST COAST	EASTON	DEMO	6	6	0	0	0	0.00	0	0.00	0.00	1	0	3	1	2	0	0	0
ABC CONSTRUCTION	...	137	EAST COAST	VA Beach	MEGHAN G	5	5	0	0	0	0.00	0	0.00	0.00	0	0	0	0	0	0	0	0
ALTOID MINTS	...	41	EAST COAST	VA Beach	KAREN	8	8	0	0	0	0.00	0	0.00	0.00	0	0	0	0	0	0	0	0
AMAZON	...	211	EAST COAST	EASTON	KAREN	4	4	0	0	0	0.00	0	0.00	0.00	1	0	4	4	0	0	0	0
APPLE STORE	...	122	EAST COAST	EASTON	KAREN	1	1	0	0	0	0.00	0	0.00	0.00	0	0	0	0	0	0	0	0
ARTIC	...	219	EAST COAST	EASTON	KAREN	2	2	0	0	0	0.00	0	0.00	0.00	3	0	2	2	0	0	0	0
AUTOMARK SERVICES	...	1	WEST COAST	San Diego	CAROLYN	62	60	0	0	2	3.23	0	-2.00	-3.23	1	0	4	0	4	0	0	0
BEAUTY PRODUCTIONS	...	142	EAST COAST	VA Beach	KAREN	3	3	0	0	0	0.00	0	0.00	0.00	0	0	0	0	0	0	0	0
BLUE COAST COMPANY	...	151	EAST COAST	EASTON	KAREN	10	10	0	0	0	0.00	0	0.00	0.00	4	0	10	0	10	0	0	0
BROTHERS MANUFACTURING...	...	81	EAST COAST	VA Beach	KAREN	2	2	0	0	0	0.00	0	0.00	0.00	1	0	5	2	3	0	0	0
BROTHERS PRINTING	...	58	EAST COAST	EASTON	DEMO	5	5	0	0	0	0.00	0	0.00	0.00	1	0	3	0	3	0	0	0
CALENDAR CREATIONS	...	44	EAST COAST	EASTON	DAWN	17	17	0	0	0	0.00	1	1.00	5.88	7	1	26	8	18	0	0	1
CATERING LAB	...	113	EAST COAST	EASTON	KAREN	1	1	0	0	0	0.00	0	0.00	0.00	0	0	0	0	0	0	0	0
						484	444	0	1	40	2.02	7	-33	2.34	56	6	185	60	125	0	10	9

Record 1 of 36

Select Date Range1/1/202212/31/2022

Key ClientsKey StaffersStaffers ContactsCreate XLSX File

**SITUATION:** The agency would like to see Dashboard of Client by Salesperson to include activity based on Assignments, Jobs, Turnover, Submittals, Interviews, Application Downloads, etc.

**STEPS:****I. Give user(s) access to KPI Reports.**

1. Open **COATS**
2. Click **Maintenance**
3. Click **Branches**
4. Click **Users**
5. Find User
6. Click **Edit Security Profile**
7. Click **Reports**
8. Check **KPI Reports**.
9. Repeat for each user.

**II. Pulling the data from Clients based on all Salespersons**

1. Open **COATS**.
2. Click **Reports**.
3. Click **KPI Reports**.
4. Click **KPI Clients by Sales**.
5. Click **Clients** tab.
6. Click **Select Date Range** to select desired date range.
7. Click **Key Clients**.
8. This data is pulled by the **SALESPERSON** attached to the **CLIENT** Master Record. Depending on the date range and user view, the following data will appear. Below each column is defined.

**Name** – Name of Client

**Client #** - Client Number

**Region** – Client Region

**Branch** – Client Branch

**Sales Person** – Sales Person attached to the Client Master Record

**Total** – Total of CON + Terminated (FIN, NER, T/H, D/H) within date range; used to capture % change.

**CON** – All assignments with a Confirmed status regardless of date range.

**CON Future** – All assignment with a Confirmed status **after** the end date of the date range.

**ACC** - All assignments with an Accepted status within date range.

**Terminated**- All assignments with a FIN, NER, T/H or D/H status with an end date within date range.

**Terminated % - Total** (without CON) / **Total** (with Confirmed) % within date range.

**New Starts** – All assignments with a Confirmed status, with a start date within date range.

**Net Change** – (**New Starts** – **Terminated**)

**% Change** – (**Net Change** / **Total**)

**Jobs Open** – All jobs with an Open, Re-Opened or Pending job status regardless of date range.

**New Jobs** – All jobs with an Open, Re-Opened or Pending job status date change within date range.

**Emp\_Need** – Total number of employees needed (This # is pulled from the **Employees** field from the Order template) from only Open, Re-Opened or Pending Orders, regardless of date range.

**Emp Have**– Total number of employees CON from only Open, Re-Opened or Pending Orders, regardless of date range.

**Still Need** – Total number of employees Still needed (This is the **Employee Need** – **Employee Have** = **Still Need**) from only Open, Re-Opened or Pending Orders, regardless of date range.

**Jobs Closed** - All jobs with a Client Filled, Competitor Filled or Cannot fill job status date change within date range.

**Jobs Filled** - All jobs with a Job Filled job status date change within date range.

**Submittals** – Employees with a status change of ACC, PEN, INTV or CREJ contact note dated within date range counts as a submittal. The date is based on when the user clicked ACC, PEN, INTV, or CREJ, not on the assignment start date.