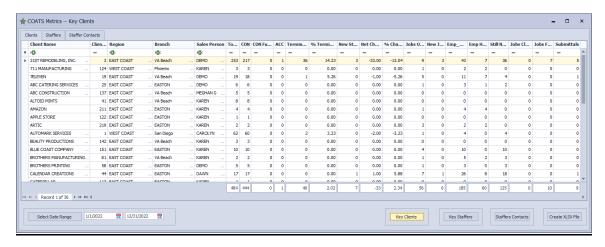
updated 2/10/23

KPI – Clients By Sales



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.