



## *Goal Tracking Setup Guide*

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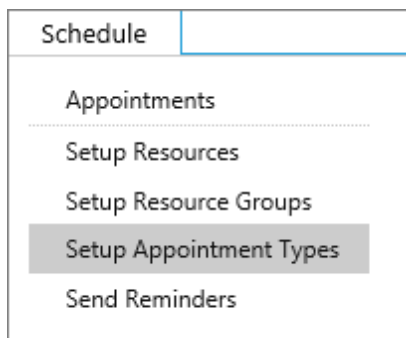
## Introduction

When Envision Cloud is configured with the Goal Tracking, you are able to generate reports that contain required information for goals. To accurately use Envision Cloud with Goal Reporting, Envision Cloud must be setup with key information. Follow these Step-by-Step instructions to accurately setup Envision for Goal Reporting.

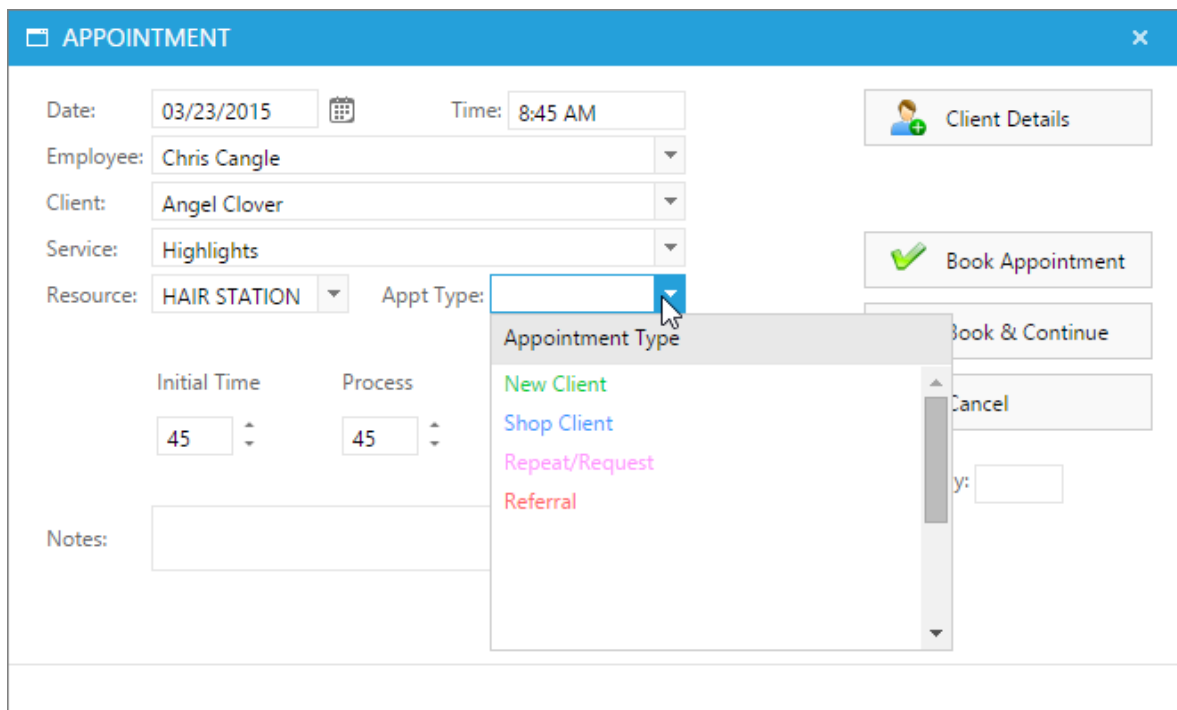
## Setting Up For Goal Tracking

### Adding Appointment Types

Appointment Types are used for goal reports in Envision Cloud. To set up your appointment types, click on Schedule in the Tool Bar of Envision Cloud and select Appointment Types from the drop down menu.



You may add appointment types to the list. Appointment types are selected when booking appointments on the calendar. The default selections (as shown below) can not be deleted.



## Hiding Default Appointment Types

You may choose to hide the default types from selection on the appointment calendar. To hide the types, select the Company Settings gear in the upper right of the screen and choose the Calendar Options tab.

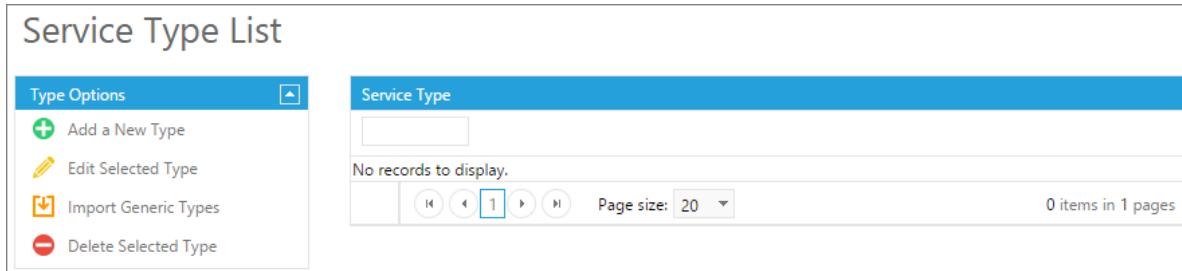
The screenshot shows the 'Company Settings' window with the 'calendar options' tab selected. The 'Hide Default Appointment Types' checkbox is highlighted with a red box. Other settings include 'Stretch columns to fit schedule' (checked), 'Allow booking in shop closed / employee off times' (unchecked), 'Show customer popup notes when booking' (checked), 'Show service popup notes when booking' (unchecked), and 'Require initials to be entered when booking' (checked). The 'Schedule Time Slot' is set to '15 minutes (default)' and the 'Schedule Unavailable/Disabled Timeslot Color' is set to black.

Options	company info	general options	tax setup	pos options	calendar options	online booking	appt reminder	goals
<input checked="" type="checkbox"/> Save Settings <input checked="" type="checkbox"/> Cancel Changes	<input type="checkbox"/> Available times are based on employee work schedule (if unchecked, everyone is available during business hours)	<input type="checkbox"/> Disable drag to move appointments <input type="checkbox"/> Disable drag to resize appointments <input type="checkbox"/> Allow Double Booked Appointments <input type="checkbox"/> Use qualified services when booking appointments	<input checked="" type="checkbox"/> Stretch columns to fit schedule	<input type="checkbox"/> Allow booking in shop closed / employee off times	<input checked="" type="checkbox"/> Hide Default Appointment Types	<input checked="" type="checkbox"/> Show customer popup notes when booking <input type="checkbox"/> Show service popup notes when booking	<input checked="" type="checkbox"/> Require initials to be entered when booking	
	Schedule Time Slot: 15 minutes (default)	Schedule Unavailable/Disabled Timeslot Color: <span style="background-color: black; color: black;">█</span>						

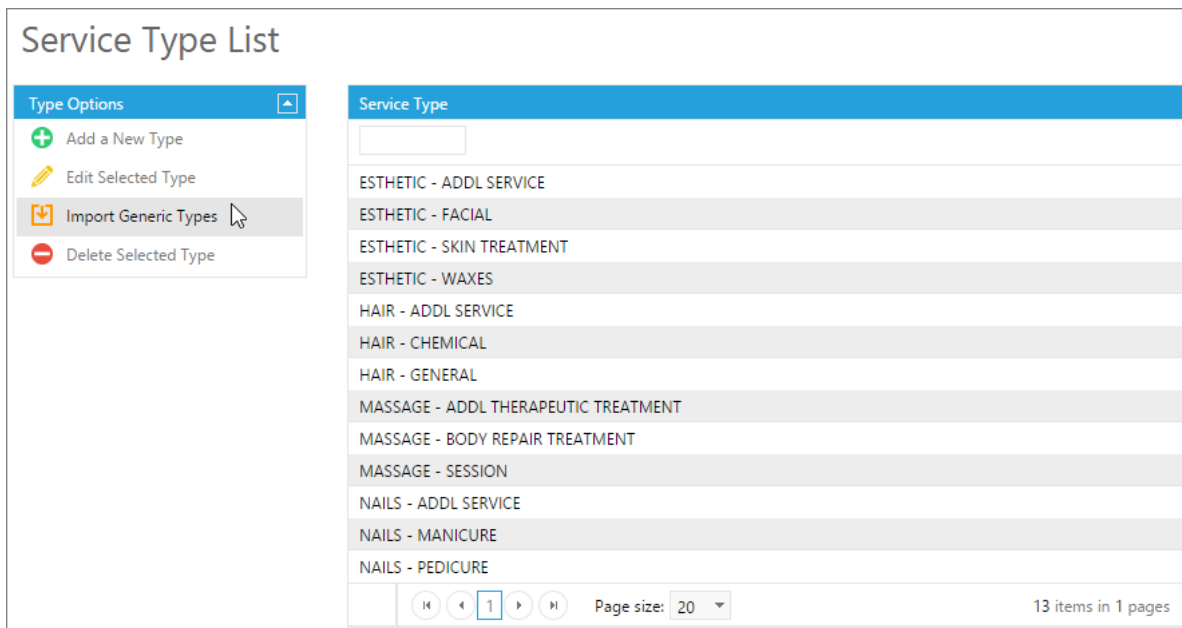
Check the box highlighted on the screen to hide the default types.

## Adding Service Types

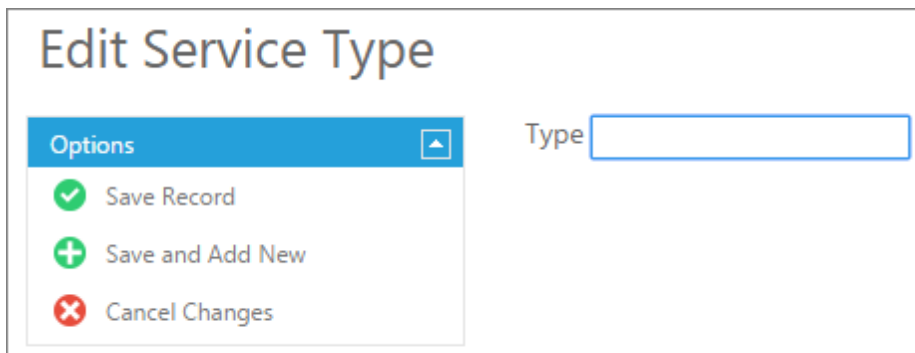
Service Types are used for goal reports in Envision Cloud. To set up your service types, click on Inventory in the Tool Bar of Envision Cloud and select Service Types from the drop down menu.



When first opening the list, it will be blank. To quickly add common service types, select to Import Generic Types in the option box to the left. Once added, the service types may be edited.



New or different service types may be added individually.



## Assign Service Types to Services

Once service types are created, they will need to be assigned to individual services in the Envision Cloud program. To open a service profile, click on Inventory in the Tool Bar of Envision Cloud and select Service List from the drop down menu. If no services are entered in the program, select to add a new service. If services are entered in the program and you wish to edit, double-click to open the record.

Select the service type you wish to apply to this service from the appropriate drop down and choose to save the record.

### Edit Service Record

**Options**

- Save Record
- Save and Add New
- Cancel Changes

**general** | qualified services | consumables

**Service Information**

Service Id: COLOR  Active

Description: Women's Color

Department: CHEMICAL

Class: COLOR

**Service Type: HAIR - CHEMICAL**

Required Resource: HAIR STATION

**Time to Complete**

Initial: 30 | Process: 30 | Complete: 30

**Service Price Levels**

Level 1	65.00	Level 2	68.00	Level 3	71.00	Level 4	74.00	Level 5	77.00
Level 6	80.00	Level 7	62.00	Level 8	0.00	Level 9	0.00	Level 10	0.00

**Additional Options**

- Enable Commission Override: 0.00
- Enable this service for online booking
- Non-Taxable
- Non-Refundable
- Show In Sales Register Product Buttons

Popup Note at Booking

## Creating Goals

Goals can be created for providers and front desk personnel. To open the goal list, click on Employee in the Tool Bar of Envision Cloud and select Employee Goals from the drop down menu. If no goal plans are entered in the program, select to add a new goal plan. If goals are entered in the program and you wish to edit, double-click to open the record.

## Front Desk Goal Plan

### Goal Name

Enter a name for your goal. If you will have several goal plans, be as descriptive as possible. For example, "Stylist Level 1" or "Esthetic Level 3".

### Goal Type

Select from the drop down if this will be a goal level for front desk operators or service providers. The available goal entries will change per type.

### RTS%

Enter the goal retail to service percentage for the business.

### Prebook %

Enter the goal prebook percentage for the business.

### Gift Certificates Sold

Enter a goal number of gift certificates to sell.

**Referrals by Desk Personnel**

Enter the number of referrals to be made by the front desk operators.

**Total Number of Guests**

Enter a number of guests for this provider to service.

**Number of Prebooks**

Enter a number of prebooks for this provider to complete.

**Total Number of Services**

Enter a number of services for this provider to complete.

**Retail Dollars per Guest**

Enter a goal amount of the average retail dollars spent per guest.

**Service Provider Goal Plan**

<b>Edit Goal Plan Record</b>	
<b>Options</b>	Goal Name <input type="text" value="STYLIST"/>
<input checked="" type="checkbox"/> Save Record	Goal Type <input type="text" value="Service Provider"/>
<input checked="" type="checkbox"/> Save and Add New	Total Number of Guests <input type="text" value="90"/>
<input checked="" type="checkbox"/> Cancel Changes	Number of Prebooks <input type="text" value="45"/>
	Total Number of Services <input type="text" value="145"/>
	Retail Dollars per Guest <input type="text" value="7"/>

**Total Number of Guests**

Enter a number of guests for this provider to service.

**Number of Prebooks**

Enter a number of prebooks for this provider to complete.

**Total Number of Services**

Enter a number of services for this provider to complete.

**Retail Dollars per Guest**

Enter a goal amount of the average retail dollars spent per guest.



Appointment Type Goals	
Appointment Type	Goal
New Client	<input type="text" value="36"/>
Shop Client	<input type="text" value="10"/>
Repeat/Request	<input type="text" value="10"/>
Referral	<input type="text" value="10"/>
CUSTOM APPT TYPE	<input type="text" value="10"/>

### Appointment Type Goals

Enter any specific goal numbers you wish this provider level to attain. If you do not wish the type to show or factor on reports for employees assigned with this goal plan, leave the field blank.

Service Type Goals	
Service Type	Goal
HAIR - GENERAL	<input type="text" value="0"/>
HAIR - CHEMICAL	<input type="text" value="0"/>
HAIR - ADDL SERVICE	<input type="text" value="0"/>
NAILS - MANICURE	<input type="text" value="0"/>
NAILS - PEDICURE	<input type="text" value="0"/>
NAILS - ADDL SERVICE	<input type="text" value="0"/>
MASSAGE - SESSION	<input type="text" value="0"/>
MASSAGE - BODY REPAIR TREATMENT	<input type="text" value="0"/>
MASSAGE - ADDL THERAPEUTIC TREATMENT	<input type="text" value="0"/>
ESTHETIC - FACIAL	<input type="text" value="0"/>
ESTHETIC - SKIN TREATMENT	<input type="text" value="0"/>
ESTHETIC - WAXES	<input type="text" value="0"/>
ESTHETIC - ADDL SERVICE	<input type="text" value="0"/>

### Service Type Goals

Enter the number per applicable service type for this provider type and level. If you do not wish the type to show or factor on reports for employees assigned with this goal plan, leave the field blank.

## Assign Goal Plans to Employees

Once goal plans are created, they will need to be assigned to individual employees in the Envision Cloud program. To open an employee profile, click on Employee in the Tool Bar of Envision Cloud and select Employee List from the drop down menu. Double-click the employee you wish to edit to open the record.

Select the goal plan you wish to apply to this employee from the appropriate drop down and choose to save the record.

### Edit Employee Record

Options

- Save Record
- Cancel Changes

- general
- schedule options
- qualified services
- access

Employee Id: ALLY

First Name: Ally

Middle Name:

Last Name: Angle

Email: 1@email.com

Home Phone: 555-555-8888

Mobile Phone: 555-555-8887

Address 1: 123 Soleado St

Address 2:

City: Orlando

State: FL

Postal: 32801

Location: Apaindegia

Department: MASSAGE

Type: Select Type

**Goal Plan:**

Security Profile: FRONT DESK

Welcome Screen: Daily Dashboard

Price Level: 2

Commission Plan: FLAT 60/10

Hourly Wage: 0.00

Pay Greater of Wages or Commission

Birthday: 7/6/1979

Start Date: 12/2/2013

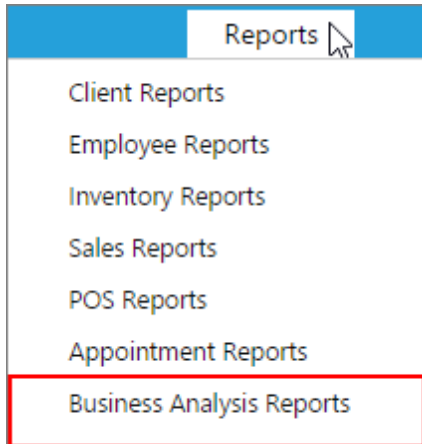
Employee Bio: Ally has been practicing massage therapy for over 5 years, and specializes in hot stone massage.

**Set a new employee password**

New Password:  Save

## Goal Reports

To access goal reports, click on Reports in the Tool Bar of Envision Cloud and select the Business Analysis Reports from the drop down menu.



The goal reports available are appointment types, service types, and the Employee Goal Summary.



## Appointment Types by Employee

Appointment Type by Employee show a breakdown of the appointment types that each employee had for the selected date range.

Appointment Type by Employee		
07/17/2015 to 07/17/2015		
Employee	Appointment Type	Count
JANIE	Referral	1
JANIE	Shop Client	3
<b>Employee Total:</b>		<b>4</b>
<b>Report Total:</b>		<b>4</b>

## Appointment Types by Company

The Appointment Types by Company show the total of appointment types for the business.

Appointment Type by Company	
07/17/2015 to 07/17/2015	
Appointment Type	Count
Referral	1
Repeat/Request	1
Shop Client	3
<b>Report Total: 5</b>	

## Service Types by Employee

The Service Types by Employee report show the service types that each employee performed. If a performed service does not have a service type assigned, the service will show as 'Unassigned' in the listing.

Service Type by Employee			
Employee	Service Type	Count	Sales Amount
ALLY	HAIR - GENERAL	3	280.00
	<b>Sub-total:</b>	3	280.00
CHRIS	MASSAGE - SESSION	3	235.00
	<b>Sub-total:</b>	3	235.00
DAVID	HAIR - GENERAL	4	119.00
	<b>Sub-total:</b>	4	119.00
ERIN	HAIR - CHEMICAL	2	156.50
	<b>Sub-total:</b>	2	156.50
FERRIS	HAIR - CHEMICAL	4	92.00
	<b>Sub-total:</b>	4	92.00
GERI	HAIR - CHEMICAL	1	74.00
	<b>Sub-total:</b>	1	74.00
HALLIE	HAIR - CHEMICAL	1	80.00
HALLIE	HAIR - GENERAL	2	80.00
	<b>Sub-total:</b>	3	160.00
IVONNA	Unassigned	1	0.00
	<b>Sub-total:</b>	1	0.00
	<b>Grand total:</b>	21	1,116.50

## Service Types by Company

Service Types by Company shows the total of service types assigned to services performed. If a performed service does not have a service type assigned, the service will show as 'Unassigned' in the listing.

Service Type by Company		
Service Type	Count	Sales Amount
HAIR - CHEMICAL	8	402.50
HAIR - GENERAL	9	479.00
MASSAGE - SESSION	3	235.00
Unassigned	1	0.00
<b>Grand total:</b>	<b>21</b>	<b>1,116.50</b>

## Employee Goal Summary

### Important Notes for the Goal Summary report:

- The Goal Summary report will appear different for front desk personnel and service providers.
- Service types without a goal level set will not show on the goal summary report.
- Services without a service type assigned will not count towards the goals set.

## Front Desk Provider Goal Summary

Employee Level Goals Summary			
<b><i>Hallie Hangle</i></b>			
DESK			
FDO			
07/13/2015 - 07/20/2015			
<b>General Goals</b>			
	Total	Goal	So Far
<b>RTS</b>	14.91	20.00	74.55
<b>Prebook %</b>	81.40	85.00	95.76
<b>Gift Certificates Sold</b>	1	5	20.0
<b>Referrals by Frontdesk</b>	0	3	0

## Service Provider Goal Summary

### Employee Level Goals Summary

#### ***Ferris Fangle***

ESTI

Service Provider

07/13/2015 - 07/13/2015

#### General Goals

	Total	Goal	So Far
<b>Total Guests</b>	3	90	3.33
<b>Number of Prebooks</b>	7	45	15.56
<b>Number of Services</b>	4	145	2.76
<b>Retail Dollars per Guest</b>	38	7	15.56

#### Appointment Type Goals

	Actual	Goal	% To Goal
<b>New Client</b>	0	5	0
<b>Shop Client</b>	3	10	30.0
<b>Repeat/Request</b>	0	10	0
<b>Referral</b>	0	5	0

#### Service Type Goals

	Actual	Goal	% To Goal
<b>ESTHETIC - ADDL SERVICE</b>	0	15	0
<b>ESTHETIC - FACIAL</b>	2	15	13.33
<b>ESTHETIC - SKIN TREATMENT</b>	1	15	6.67
<b>ESTHETIC - WAXES</b>	1	25	4.00