

VERSION 1.0
OCTOBER 8, 2019

Apps for Greentree

KPI METRICS REPORTING

APP NUMBER: 010116

Powered by:

MYOB Greentree

TABLE OF CONTENTS

Features	2
Important Notes	2
Other Requirements	2
User Instructions.....	3
KPI Reporting	3
Opened Service Requests	4
Closed Service Requests.....	4
Average response time.....	4
Productivity %	4
Implementation Guide.....	5
App Installation.....	5
Other Greentree Configuration	5
App Configuration	5

FEATURES

1. KPI Metrics Reporting

This App will provide functionality for service request KPI reporting.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: CRM

Associated Apps: None

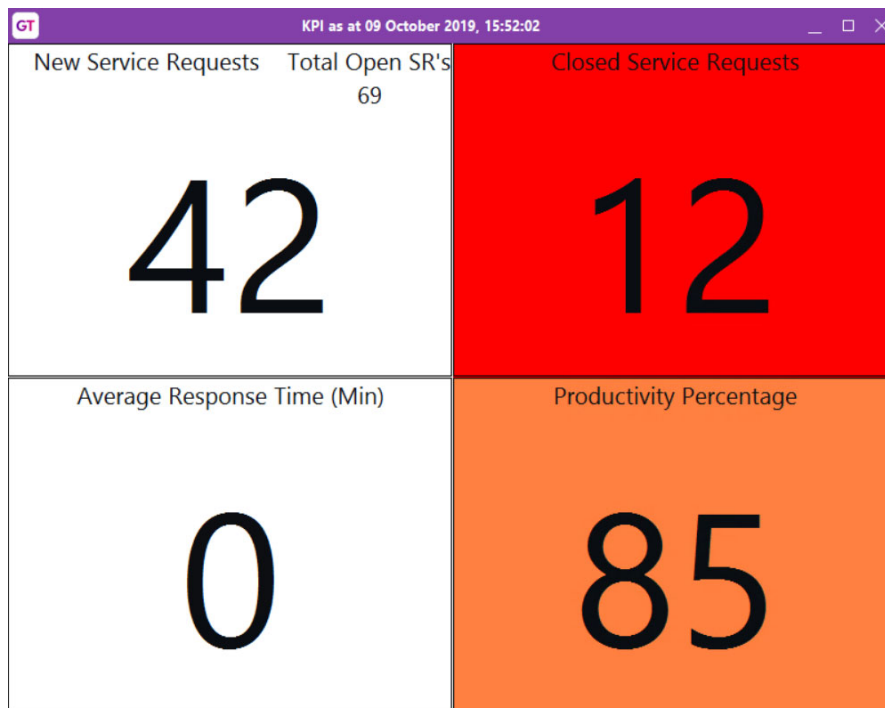
USER INSTRUCTIONS

KPI REPORTING

| Process | KPI Reporting |

A set of KPI Metrics are provided.

- Service Requests opened in the last 24 hours
- Service Request closed in the last 24 hours
- Average responded by time over the last 24 hours
- Productivity % over the last 24 hours



- A UDF on service requests is defined in configuration and if ticked on a service request will cause the SR to be excluded in the calculations

OPENED SERVICE REQUESTS

Service requests opened within the last 24hrs will also have a value in the top right that is the total number of open service requests. Open Service requests are any that are not on the status Closed, Completed or Rejected.

CLOSED SERVICE REQUESTS

Service requests that have had the status changed from anything to either Closed, Completed or Rejected in the past 24 hours.

AVERAGE RESPONSE TIME

This is the time from when the service request is opened, to the time that the status changes to Working. This will be the number of minutes total divided by the number of requests changed in the previous 24 hours.

PRODUCTIVITY %

This the value of chargeable time less the value of non-chargeable time based on the set up in the Activity Code. Divided by the total of chargeable time multiplied by 100.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** |
3. Enter the New Registration Codes supplied and click Install App

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	✓	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	✓	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	✓	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	✓	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	✓	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the **KPI Reporting** App.
5. Click on the **Edit Users** button and select the users who will be configured to use the KPI Reporting App, for which companies.
6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.

OTHER GREENTREE CONFIGURATION

Not required for this App.

APP CONFIGURATION

1. Select/Highlight the **KPI Metrics Reporting** App.
2. Click on the **Change** button

KPI	From Range	To Range	Colour
Average Response Time	12	14	Blue
Average Response Time	14	16	Orange
Closed Service Requests	0	3	Green
Closed Service Requests	4	20	Red
New Service Requests	0	5	Dark Blue
Productivity Percentage	1	100	Orange
			Blue

Exclude From KPI UDF

Enter UDF name to use to exclude service requests

Calendar

Enter working calendar

Auto Load User

Enter User name for which this display will auto load so it can be displayed on a shared monitor.

KPI Duration (hrs)

Enter interval in hours for data i.e. how far back in time to start from

Refresh Time (min)

Enter refresh interval in minutes

Colour ranges

Set up colour ranges used for display

