USER GUIDE · VERSION 1

KPI board

Set each outlet's monthly sales targets, share them out to the staff, and record the sales against them. The same app holds task boards for team work such as openings and campaigns.

1. What it is for
2. Set an outlet's yearly budget
3. Share an outlet's target with your staff
4. Record your sales
5. Record your outlet's sales
6. Read the sales report
7. Load the monthly sales
8. Work on a task board
9. Give people access

What it is for

For: Everyone

KPI board does two jobs.

Sales targets (KPI, key performance indicators). Head office sets each outlet's sales target for every month of the year. An outlet manager can share their outlet's target between the people who work there. Each month, the sales are recorded against the targets, and everyone can see how far ahead or behind they are.

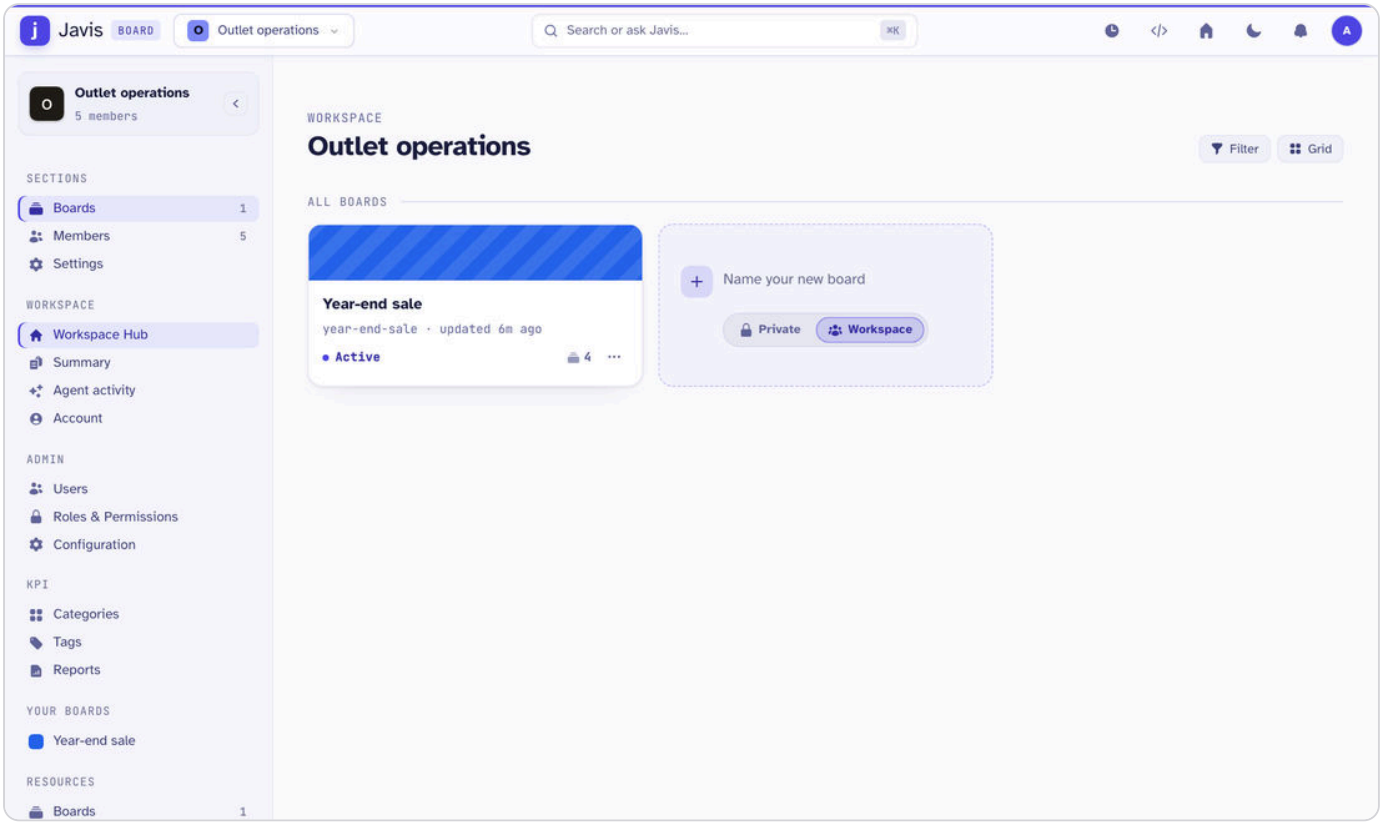
Targets work on three levels:

1. **HQ** (head office): the whole company, which is the outlets added up.
2. **Outlet**: one shop's target, set by HQ.
3. **Staff**: one person's share of their outlet's target, set by the outlet manager. This level is optional.

Sales are typed on the lowest level only. Every level above is the total of the one below.

Task boards. A board is a set of lists, such as **To do**, **Doing** and **Done**, with a card for each task. Teams use them for work such as a sale, an opening or a refit.

The app's name at the top of the screen is **Javis Board**.



Who uses it

Role on screen	What they do
KPI - Staff	See their own target and record their own sales.
KPI - Manager	Share their outlet's target with staff and record the outlet's sales.
System Admin	Set outlet budgets, load the monthly sales, and manage KPI categories.
Owner, **Admin**, **Member**, **Guest**	Roles on the task boards, from full control to read and comment.

Shop staff and outlet managers see a short bar at the top with **Targets**, **Actuals** and **Reports**. Head office and administrators see the full menu on the left.

What it needs from other modules

- You sign in with the same phone number and password you use for your other work apps.
- Outlets, staff and who manages which outlet come from your company's staff records. Your login is matched to your staff record by phone number. If you see no outlets, ask HR to check the phone number on your staff record.

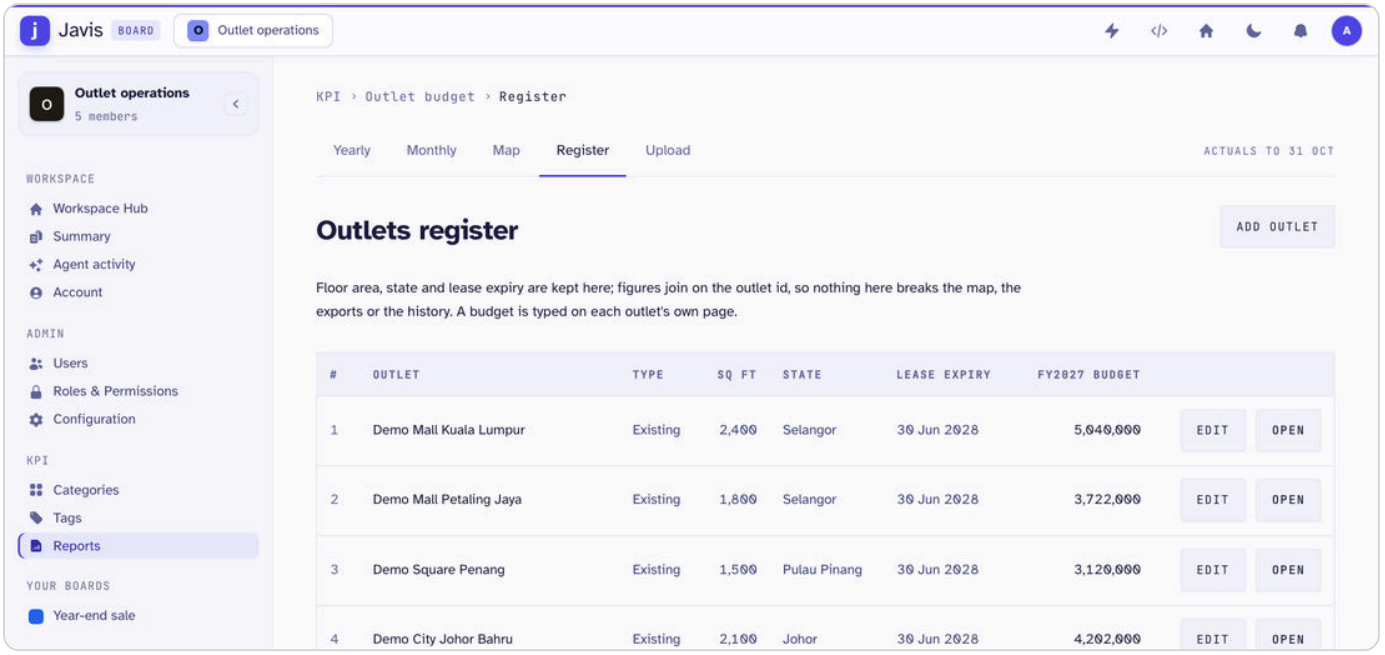
KPI BOARD

Set an outlet's yearly budget

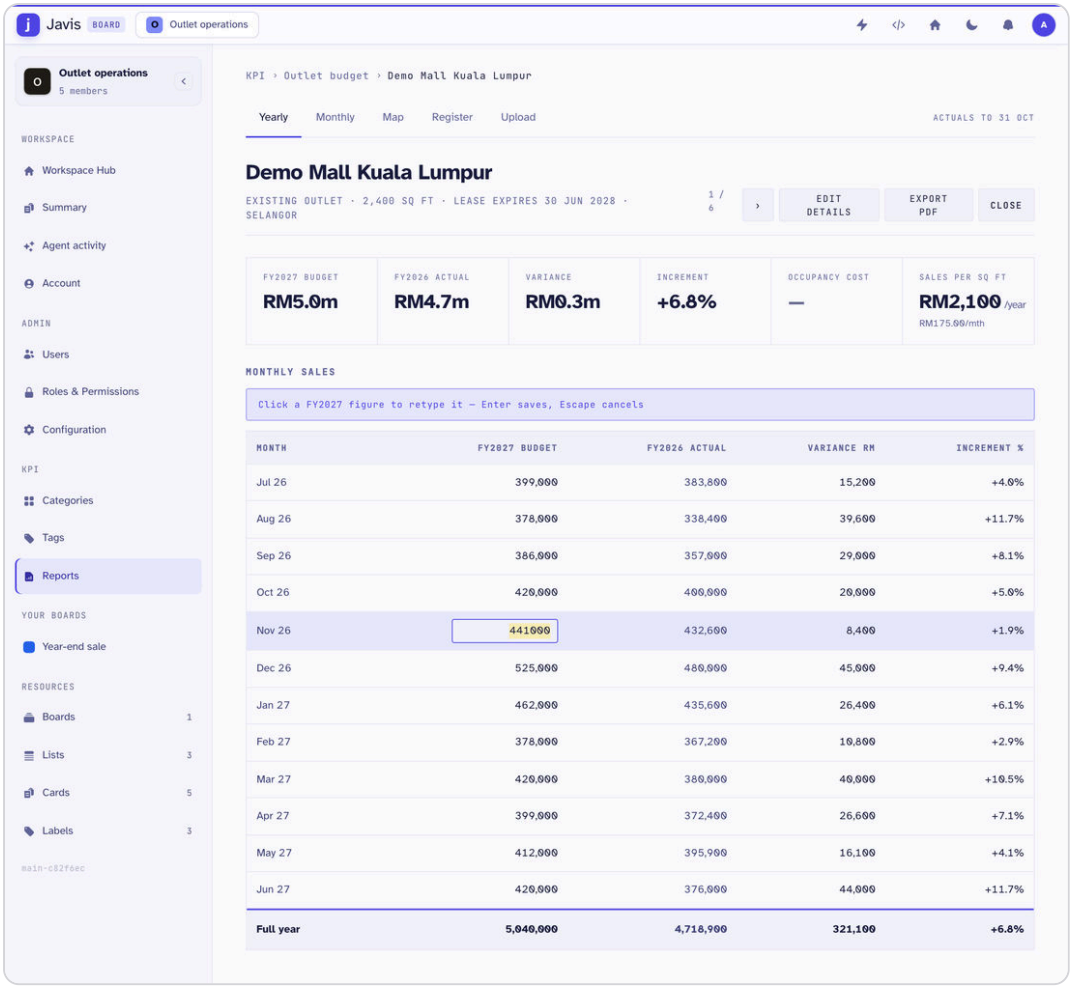
For: Head office

Each outlet's sales target for the year is typed month by month on the outlet's own page.

1. Open **Reports** in the menu on the left, then the **Register** tab.
2. Press **Open** on the outlet's row.



3. Under **Monthly sales**, click a figure in the budget column. It becomes a box.
4. Type the new figure and press **Enter** to save it. Press **Escape** to cancel.



The yearly total, the difference from last year and the targets on the KPI screens update straight away. Use **›** at the top right to move to the next outlet.

Change an outlet's details

On the **Register** tab, press **Edit** on the outlet's row to change its floor area, state or lease expiry. Press **Apply change**, then **Confirm — save to database**.

To plan a target for a shop that has not opened yet, press **Add outlet**. Outlet names come from your company's staff records and cannot be changed here.

You need a permission to change budgets and another to change outlet details. Without them, the figures can be read but not changed.

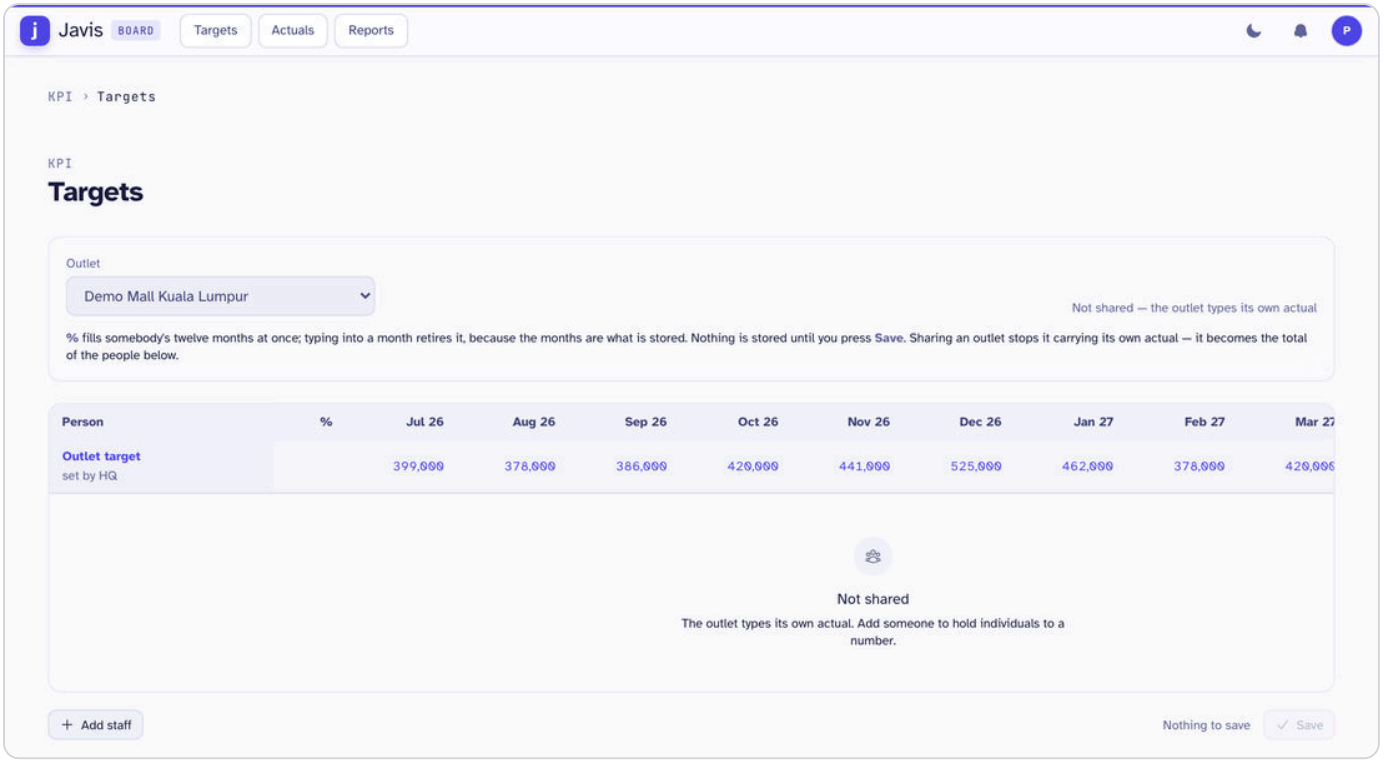
KPI BOARD

Share an outlet's target with your staff

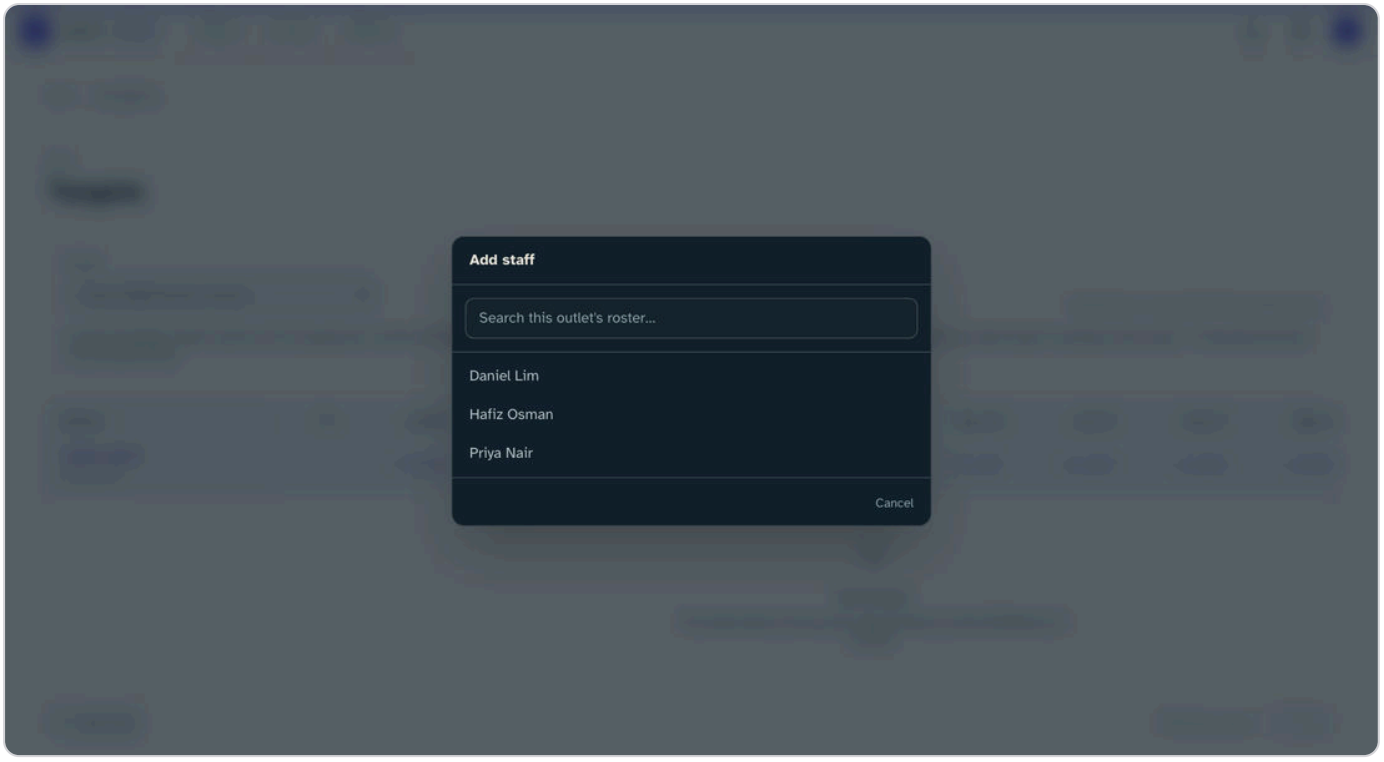
For: Outlet managers

Your outlet's target is set by head office. You can leave it as one target for the whole outlet, or share it between the people who work there. Sharing is optional.

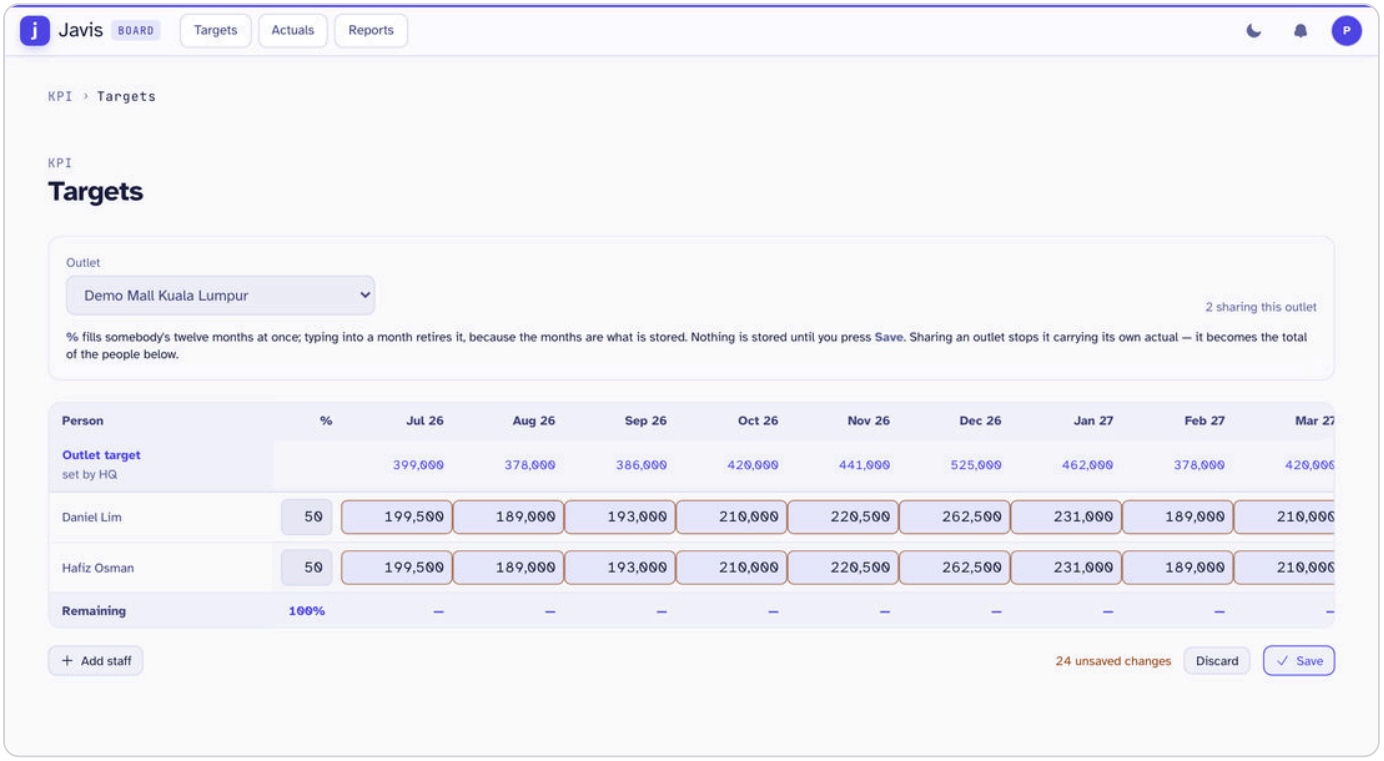
1. Press **Targets** at the top of the screen.
2. Choose your outlet under **Outlet**. The **Outlet target** row shows what head office set for each month.



3. Press **Add staff** and choose a person from your outlet. Repeat for each person.



4. Type a share in the **%** box on each person's row, for example **50** for half. It fills all twelve months for that person. To set one month by hand, click that month and type a figure.
5. Check the **Remaining** row. It must show a dash in every month, which means the shares add up to the outlet target.
6. Press **Save**. Nothing is stored until you do. **Discard** puts the sheet back as it was.



Changed figures have a coloured edge until you save. If the shares do not add up, the sheet names the months that are wrong and does not save.

Once a target is shared, each person records their own sales, and the outlet's sales become their total. To take someone off, press the cross at the end of their row and save.

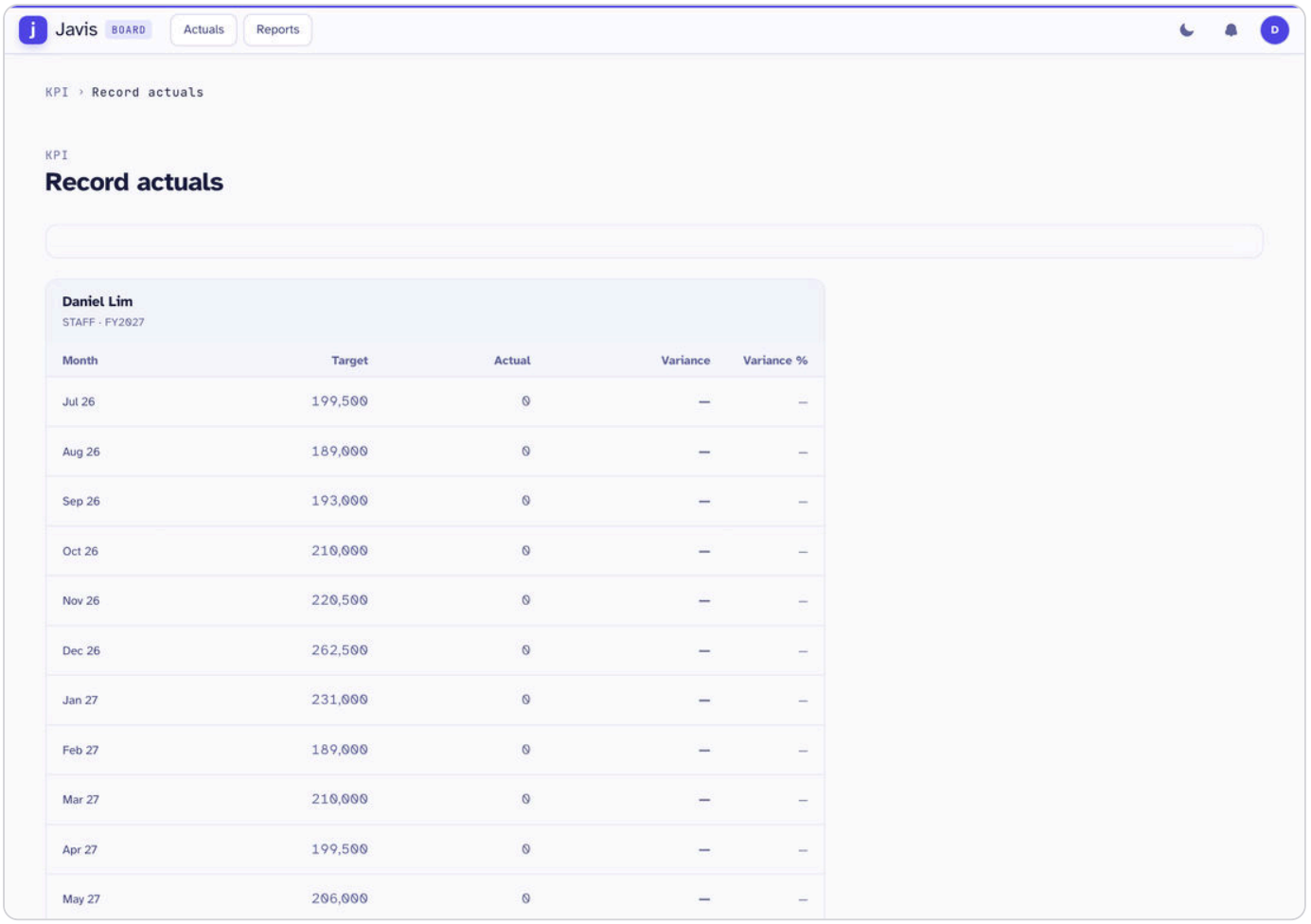
KPI BOARD

Record your sales

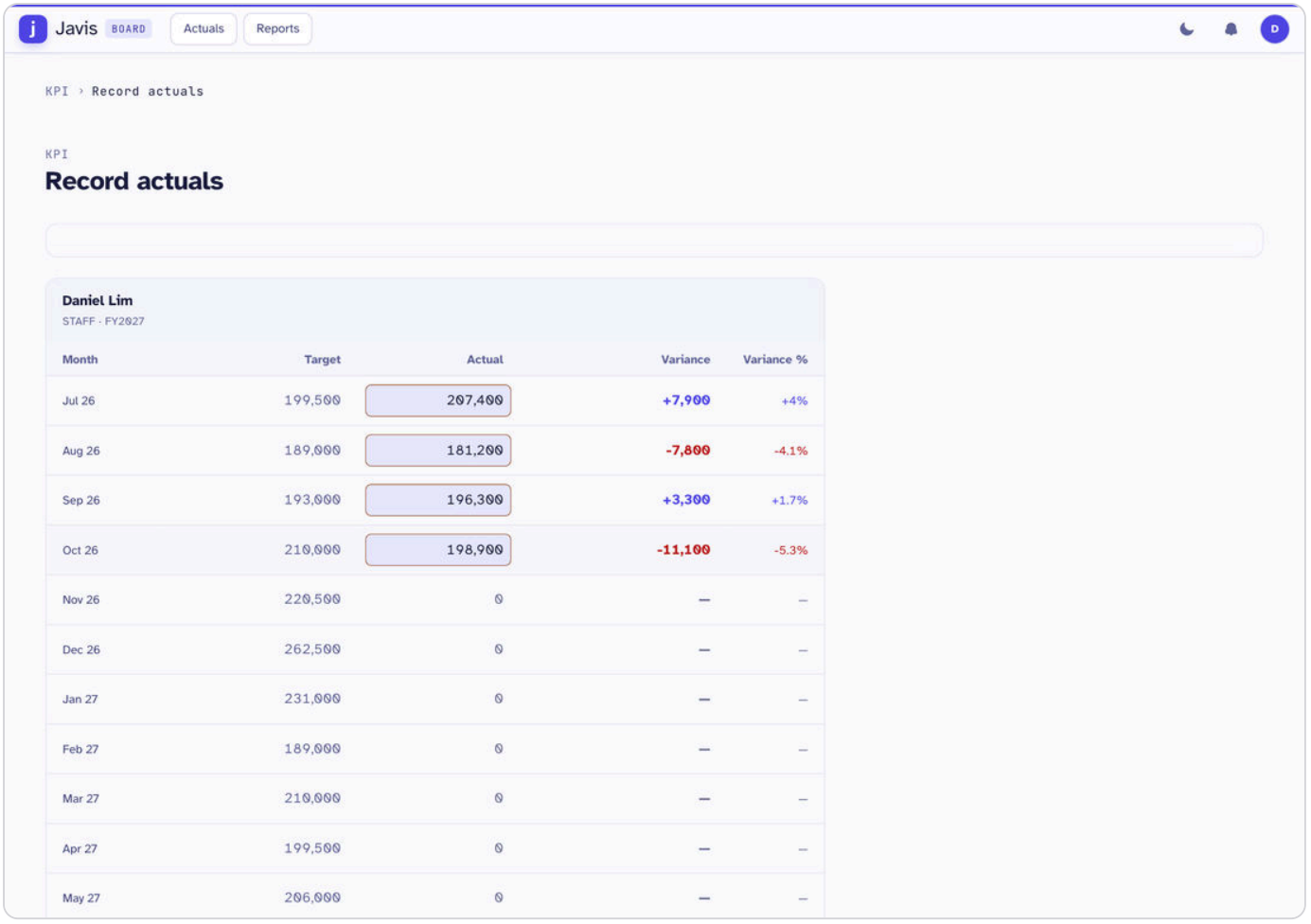
For: Staff

If your outlet manager has shared the outlet target with you, you record your own sales each month.

1. Press **Actuals** at the top of the screen. You see your target for each month of the year.



2. Click the **Actual** figure for the month, type your sales, and press **Enter**.
3. Repeat for any other month.
4. Press **Save**.



Variance shows how far above (+) or below (−) your target you are, in ringgit and as a percentage. The **Year** row adds up the whole year.

If the page says **You have no target**, your outlet manager has not shared the outlet target. Your outlet's sales are then recorded for the outlet as a whole.

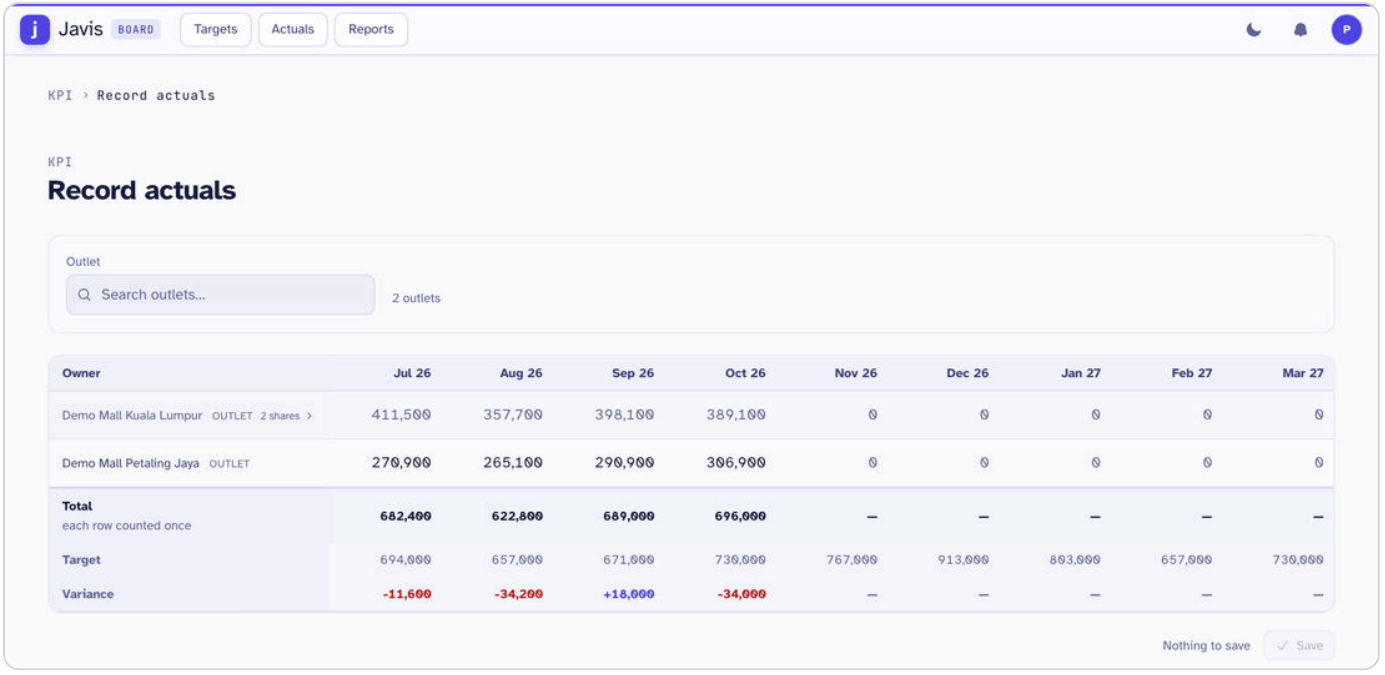
A month that has been signed off shows its figure without a box and cannot be changed.

KPI BOARD

Record your outlet's sales

For: Outlet managers

1. Press **Actuals** at the top of the screen. Each outlet you manage has a row, with the months across.
2. Click a month on your outlet's row, type the sales, and press **Enter**.
3. Press **Save**.



The bottom rows show the **Total** of your outlets, the **Target** and the **Variance**.

An outlet whose target is shared with staff shows how many shares it has, for example **2 shares**. Its figures are the total of what those people record, so you cannot type them on this row.

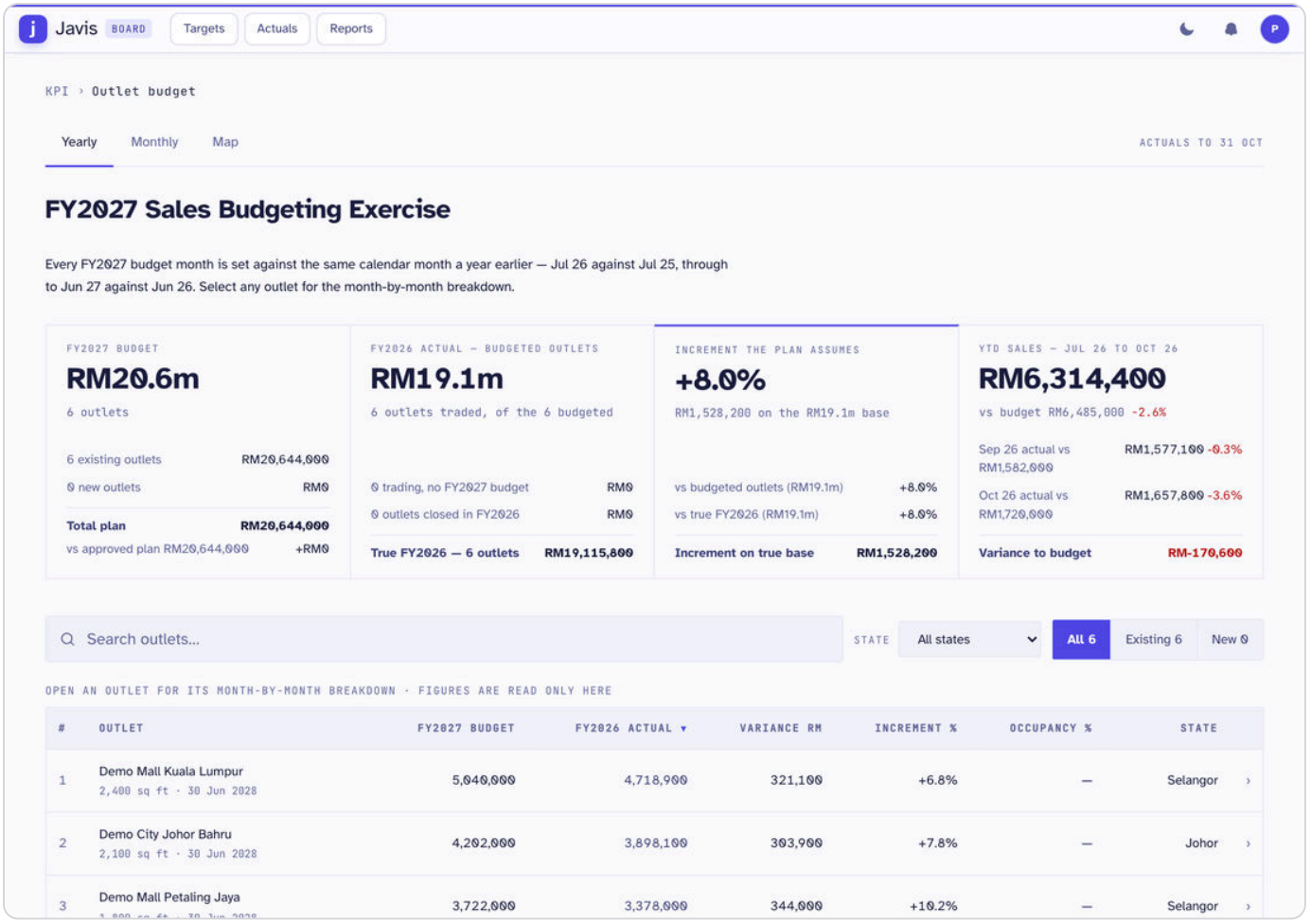
Head office can also load every outlet's sales at once from a file. See Load the monthly sales.

KPI BOARD

Read the sales report

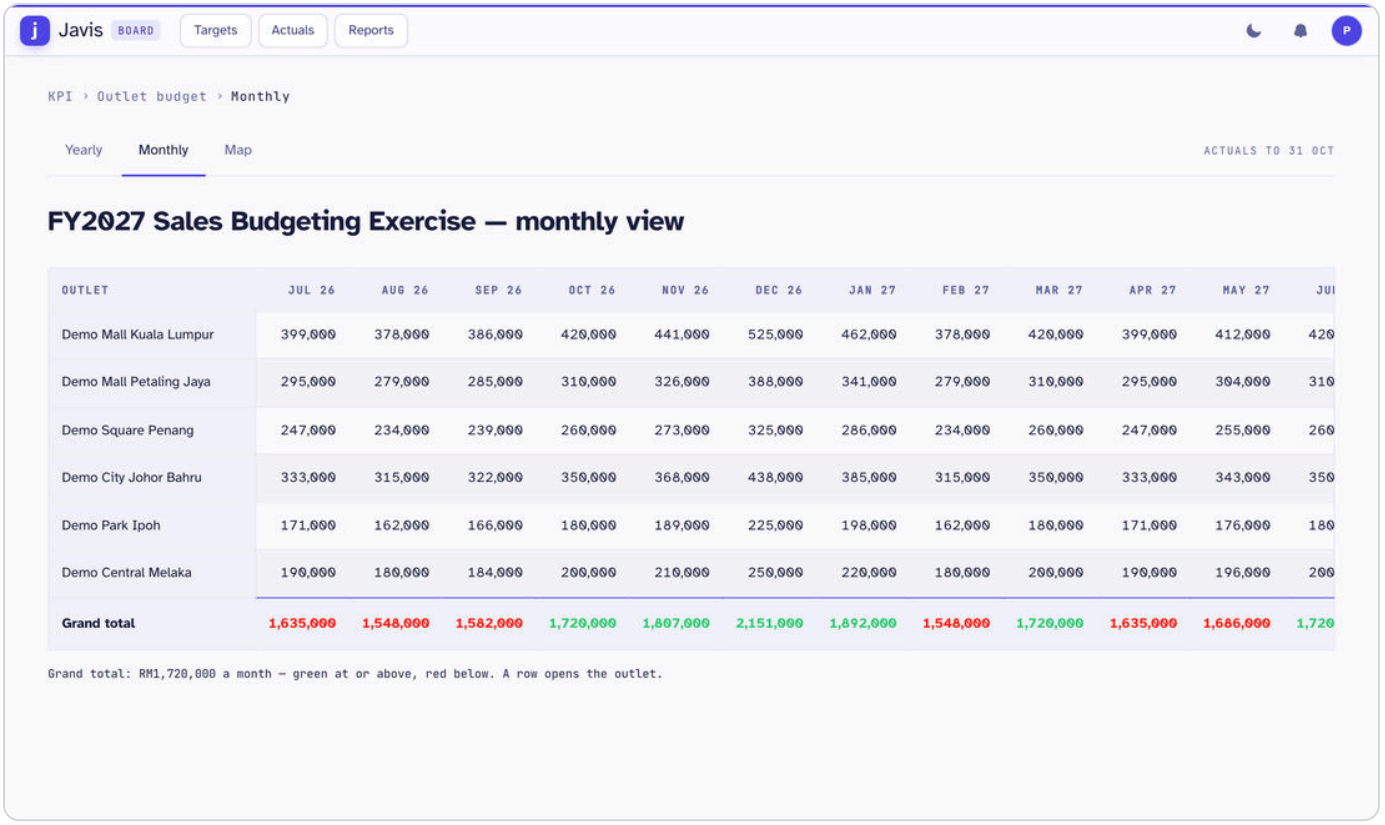
For: Managers

1. Press **Reports** at the top of the screen, or open **Reports** in the menu on the left.
2. The **Yearly** tab shows:
    - **FY2027 budget**: the total target for the year (FY means financial year).
    - **FY2026 actual**: last year's sales for the same outlets.
    - **Increment the plan assumes**: how much higher this year's target is than last year's sales.
    - **YTD sales** (year to date): sales so far against the target so far.
3. Below that, one row per outlet. Use **Search outlets...**, **State**, or **All**, **Existing** and **New** to narrow the list. Press an outlet to see its months.



Actuals to at the top right is the last day the sales figures cover.

The **Monthly** tab shows every outlet's target month by month, with a total for each month. The **Map** tab shows the totals by state.



You only see the outlets your staff record covers. Head office sees all of them. If **Reports** is missing, ask an administrator to give you access to it.

Load the monthly sales

For: Head office

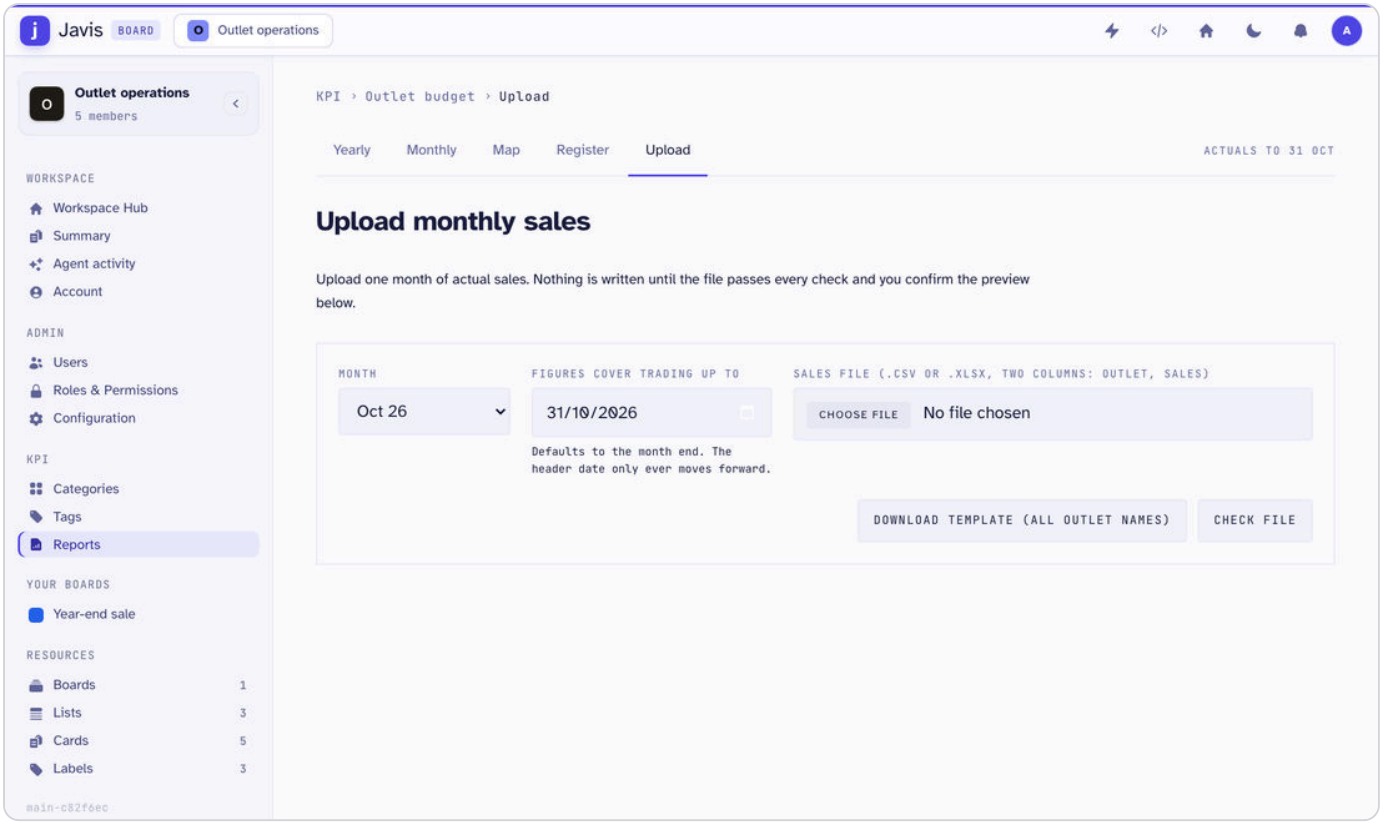
Each month, head office loads every outlet's sales from one file. Nothing is saved until the file passes every check and you confirm.

Prepare the file

- A **.csv** or **.xlsx** file, up to 5 MB.
- Two columns: the outlet name, then the sales amount. A heading row is fine.
- Amounts may include commas, spaces or **RM**.
- Press **Download template (all outlet names)** to get a file with every outlet name spelled the way the app expects. Starting from it avoids most mistakes.

Load it

1. Open **Reports** in the menu on the left, then the **Upload** tab.
2. Under **Month**, pick the month the sales belong to.
3. Under **Figures cover trading up to**, set the last day the figures cover. It starts at the month end.
4. Choose the file and press **Check file**. You see what would change, and any problems.
5. If there are no problems, press **Confirm — load into database**.



What stops a file

- An outlet name that does not match any outlet. Upper and lower case and extra spaces do not matter.
- The same outlet twice.
- An amount that is not a number or is below zero.
- An empty file.

An outlet missing from the file is only a warning. Its current figure stays as it is, so you can load part of the outlets.

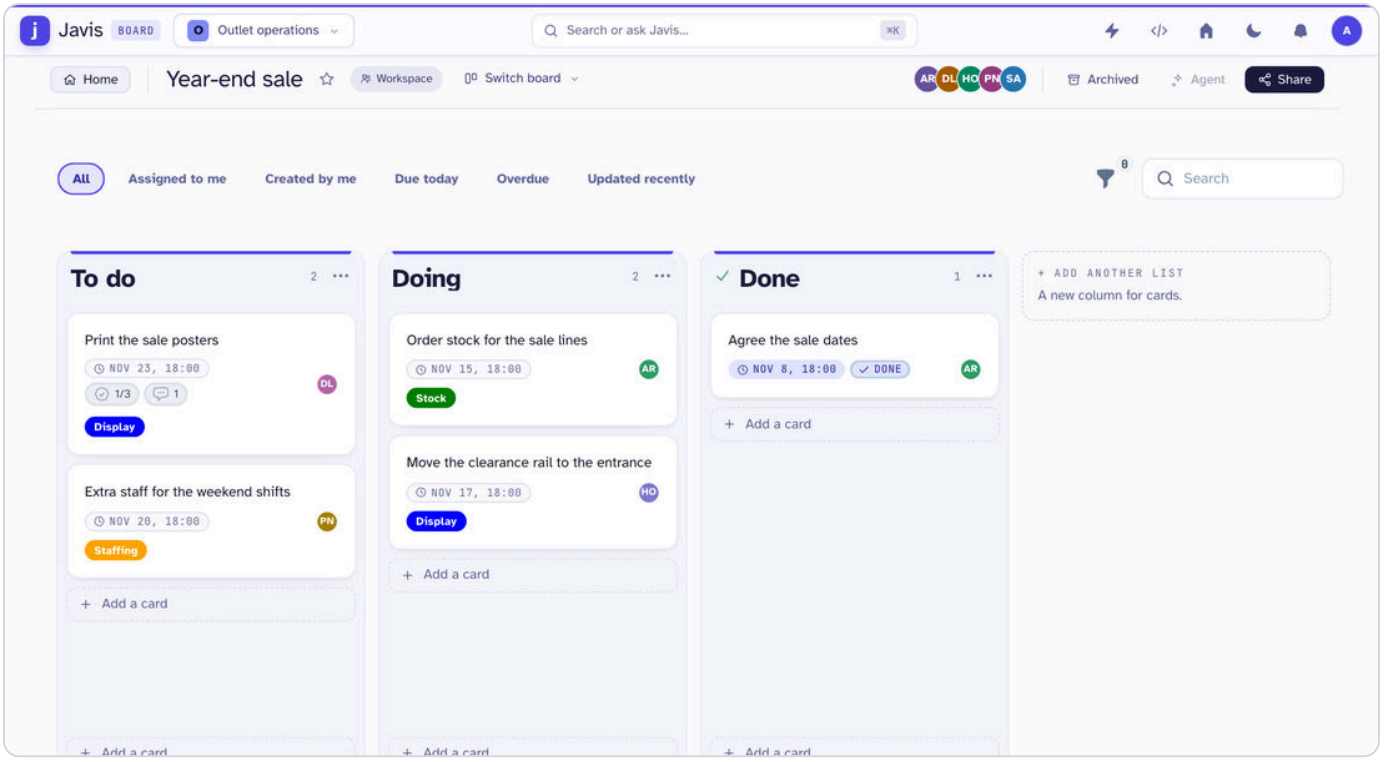
If the month is part-way through, the report shows an estimate for the full month until the month is complete.

KPI BOARD

Work on a task board

For: Everyone

1. Open the board under **Your boards** in the menu on the left, or press it on the workspace home page.
2. Each list is a column, for example **To do**, **Doing** and **Done**. Each card is one task. A card shows its due date, its checklist progress, the people on it and its labels.



Add and move cards

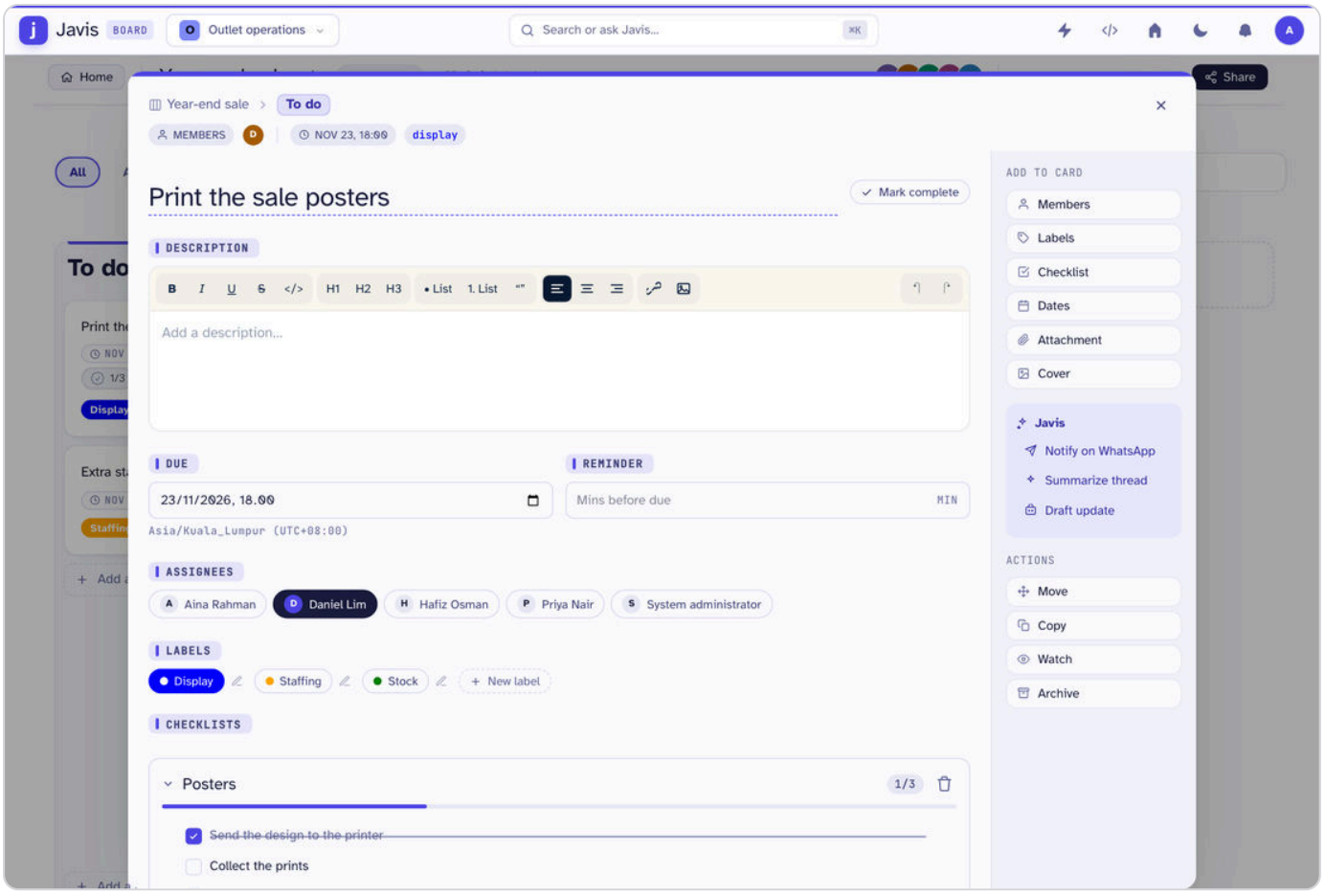
- Press **Add a card** under a list. A new card opens. Type the task as its title.
- Drag a card to another list to move it, for example from **Doing** to **Done**.
- Use **All**, **Assigned to me**, **Due today** or **Overdue** at the top to show only some cards.

Work on a card

Press a card to open it.

- Write the details under **Description**.
- Set **Due** and a **Reminder** in minutes before it is due.
- Under **Assignees**, press the people who are doing it.

- Under **Labels**, press a label to add it, or **New label** to make one.
- Tick checklist items as they are done.
- Press **Mark complete** when the task is finished.



On the right, **Add to card** adds members, labels, a checklist, dates, a file or a cover. **Actions** lets you **Move**, **Copy**, **Watch** or **Archive** the card.

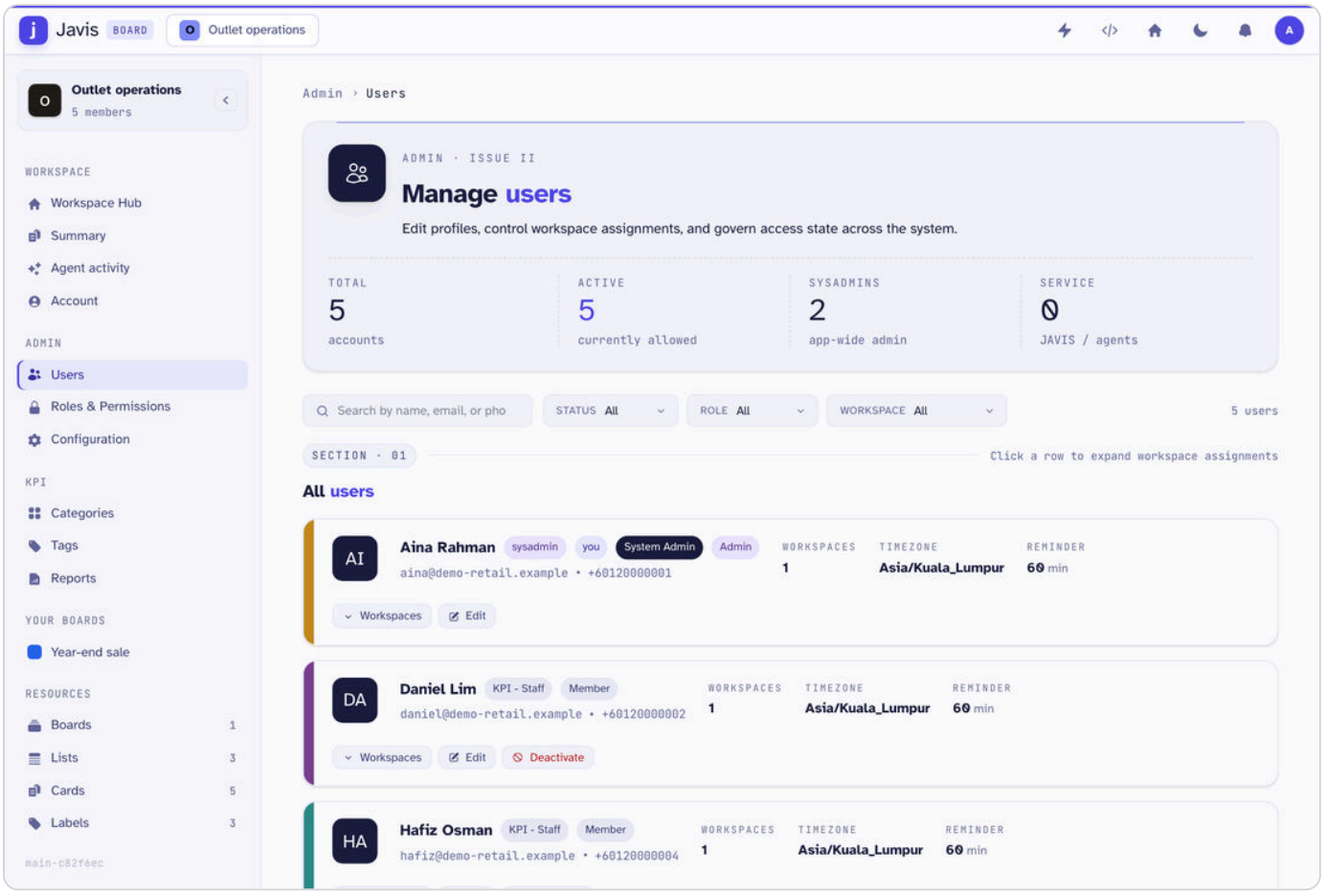
The **Javis** buttons (**Notify on WhatsApp**, **Summarize thread**, **Draft update**) only work if your company has connected the Javis WhatsApp assistant.

Give people access

For: Administrators

See and change a person

1. Open **Users** in the menu on the left. Each person shows their roles, email, phone number and how many workspaces they are in.
2. Use **Status**, **Role** and **Workspace** to narrow the list.
3. Press **Edit** to change the person's name, email, time zone or **System roles**, then press **Submit**. Press **Workspaces** to choose which workspaces they are in.
4. Press **Deactivate** to stop someone signing in. Their history is kept.



Change what a role can do

Open **Roles & Permissions** in the menu. The top part lists the task board roles (**Owner**, **Admin**, **Member**, **Guest**, **Agent**). The **KPI roles** part lists **System Admin**, **KPI - Manager** and **KPI - Staff**. Press **Edit** on a role to tick what it may do, or **Create Role** to add one.

Things a role does not decide

- Which outlets a person sees comes from your company's staff records: the outlets they manage, or the outlet they work in. A role only decides what they may do with them.
- Seeing **Reports** is a separate permission. An administrator adds it to a role on purpose, because the report shows every outlet a person covers side by side.