

OKRify

Create KPI

- Simple KPI
- Advanced KPI (Ratios)
- Assign to User
- Assign to Team



KPI Tab

Access KPI Tab in My OKR or Team Tabs from Hub

The screenshot displays the KPI Tab interface for a user named John Connor. At the top, there are three tabs: SCORECARD, KPI (which is selected), and OKR. Below the tabs, the user's name 'John Connor' is shown with an information icon. To the right of the name are three icons: a plus sign (+), a star, and a list icon. A callout box labeled 'Create KPI' points to the plus sign icon. Another callout box labeled 'Pin KPI to User or Team Tab' points to the star icon. A third callout box labeled 'KPI Board (View 12 Months historical information for all KPIs)' points to the list icon. Below these icons, there are six KPI cards, each with a title, a progress bar, and a target value. The KPIs are: 'Ratio Won Opportunity' (97/35), 'New Accounts' (4/10), 'Clsd Opp Amount' (1.5M/3M), 'Partner Inbound leads' (5/20), and 'Outbound Calls' (3/20). A fourth callout box labeled 'Upto 5 KPIs can be added to a user My OKR) or a team)' points to the right side of the KPI cards. The progress bars are color-coded: green for 'Ratio Won Opportunity', orange for 'New Accounts', yellow for 'Clsd Opp Amount', and red for 'Partner Inbound leads' and 'Outbound Calls'.

Create KPI

Pin KPI to User or Team Tab

KPI Board (View 12 Months historical information for all KPIs)

Upto 5 KPIs can be added to a user My OKR) or a team)

KPI Name	Current Value	Target Value
Ratio Won Opportunity	97	35
New Accounts	4	10
Clsd Opp Amount	1.5M	3M
Partner Inbound leads	5	20
Outbound Calls	3	20

My OKR - Default tab can be set to OKR, KPI or Scorecard (Contact your admin)

Create KPI - 1

Enter KPI Name, Abbreviation and Description

The screenshot shows the 'Create KPI (Draft)' form with the following fields and annotations:

- KPI Name:** Opportunity Won Amount Quarterly
- Abbreviation:** Opp Won Amount (Qtr)
- Description:** (Empty text area)
- Type:** Select an option (Dropdown menu with options: Private, Team, All). An arrow points to this dropdown from the 'Type' legend on the right.
- Start Date:** 1/1/2023
- End Date:** 12/31/2023
- Category:** Sales
- Tags:** Opportunity KPIs (with a close button 'x')

Annotations include orange brackets and lines connecting the text boxes to the corresponding form fields.

Type:
All - Access to all users
Team - Access to selected team
Private - Access to Owner & Selected Users

Start Date and End Date Range should be maximum of 24 Months
For Example: 1/1/2022 to 12/31/2023

Category and Tags (Optional) Enter for searching

Simple KPI

Ensure Simple KPI is enabled



Simple KPI Inactive

* Object	* Function	* Aggregate_Field	* Time_Frame	* TimeFrameDate	Filter
Opportunity	Sum	Amount	Quarterly	Close Date	
* Target	* Same Target Target				
Same Target	10,000,000.000				

Enter the following fields

- Object
- Function
- Aggregate field (Not required for count)
- Timeframe
- Timeframe Date (Date field used for grouping into timeframe)
- Click filter to enter filter information(Next page)

KPI Filter

Enter the following fields

- Field
- Lookup Object Field (Only if a Lookup field is selected in Field)
- Operator
- Value

The screenshot shows the 'KPI' configuration window. At the top, there are fields for 'Object' (Opportunity), 'Function' (Sum), 'Field' (Amount), 'Time Frame' (Quarterly), and 'Time Frame Date' (CloseDate). Below this is a 'Filters' section with a dropdown menu set to 'All Conditions are met'. Underneath the filters, there are four columns: 'Field' (Stage), 'Lookup Object Field' (empty), 'Operator' (equals), and 'Value' (Closed Won). At the bottom right, there are three buttons: 'Save', 'Preview', and 'Cancel'. Callouts with arrows point to these elements: 'Filter Conditions' points to the dropdown menu, 'Save KPI Filter' points to the 'Save' button, and 'Preview Data' points to the 'Preview' button.

Object	Function	Field	Time Frame	Time Frame Date
Opportunity	Sum	Amount	Quarterly	CloseDate

Filters: All Conditions are met

Field	Lookup Object Field	Operator	Value
Stage		equals	Closed Won

1 Save Preview Cancel

My OKR – Default tab can be set to OKR, KPI or Scorecard (Contact your admin)

Targets

* Target

Select an Option ▼

- None--
- No Target
- Timeframe Based
- Same Target

No Target - No targets for the KPI
Same Target - Same target for all periods

Time Frame Detail			
Months	Start Date	End Date	Time Frame Detail
Q1 2023	2023-01-01	2023-03-31	11,000,000.00
Q2 2023	2023-04-01	2023-06-30	12,000,000.00
Q3 2023	2023-07-01	2023-09-30	10,000,000.00
Q4 2023	2023-10-01	2023-12-31	11,000,000.00

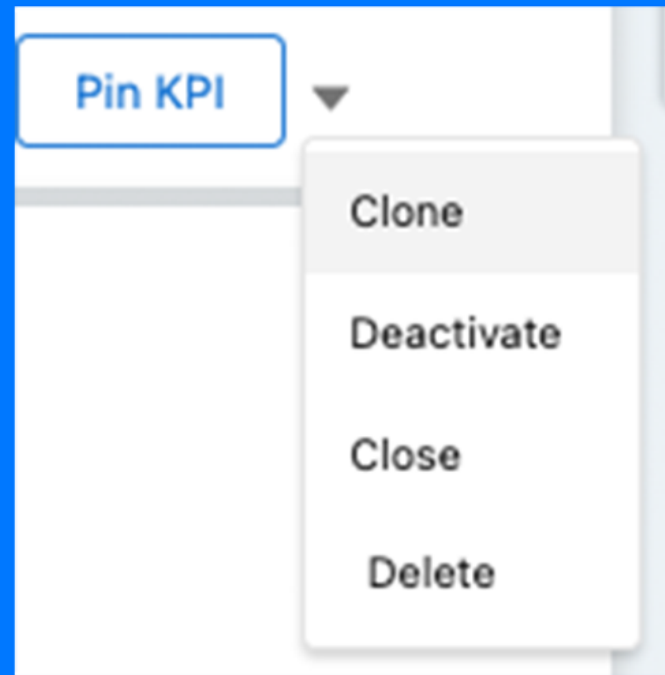
Timeframe Based Target - Different target can be entered for each period

Actions



Save - Save KPI in Draft status

Save & Activate - Save KPI in Active status



Pin KPI - Pin KPI to My OKR and/or Team tab

Clone - Clone a KPI

Deactivate - Change status of a KPI to deactivate

Close - Change status of a KPI to Close

Delete - Delete a KPI

Advanced KPI

(Ratios – Opportunity Win Ratio, Lead Qualification Ratio)

Enable Advanced KPI

Add two Objects for advanced KPIs and provide Name for each Object

Enter formula for the ratio
(Addition, Subtraction, multiplication or Division for two object items are possible)
Example $\frac{1}{2}$ or $1*2$ or $2/1$ or $1+2$

Name	Object	Function	Aggregate_Field	Time_Frame	TimeFrameDate	Filter
Won	Opportunity	Sum	Amount	Quarterly	Close Date	▼ +
All	Opportunity	Sum	Amount	Quarterly	Close Date	▼ 🗑️

Formula: Display Format:

Target:

Select Display format -
Percent or Number

Pin (Create OKR)

Pin KPI

Add to John Connor 's KPI Not yet Added

Remove from Finance 's Team Added

Add to Acme Corporation 's Team Not yet added

Click Pin KPI after activating a KPI.
Add the KPI to your user or the teams you manage.

My OKR

Manage User KPIs | Manage Team KPIs

Search:

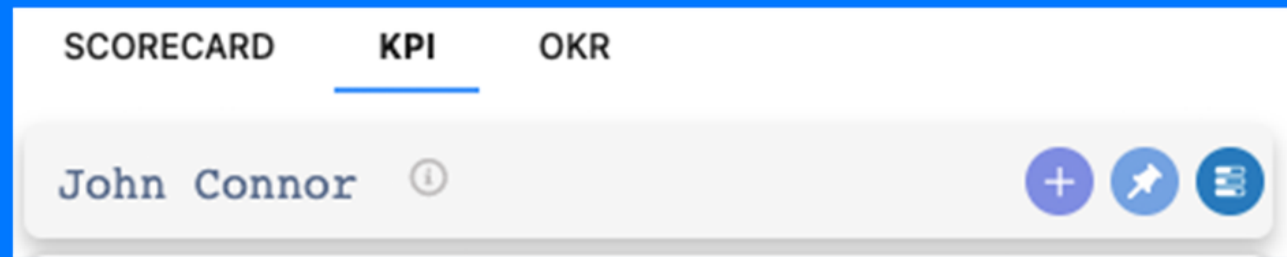
Show 15 Entries

Create KPI +

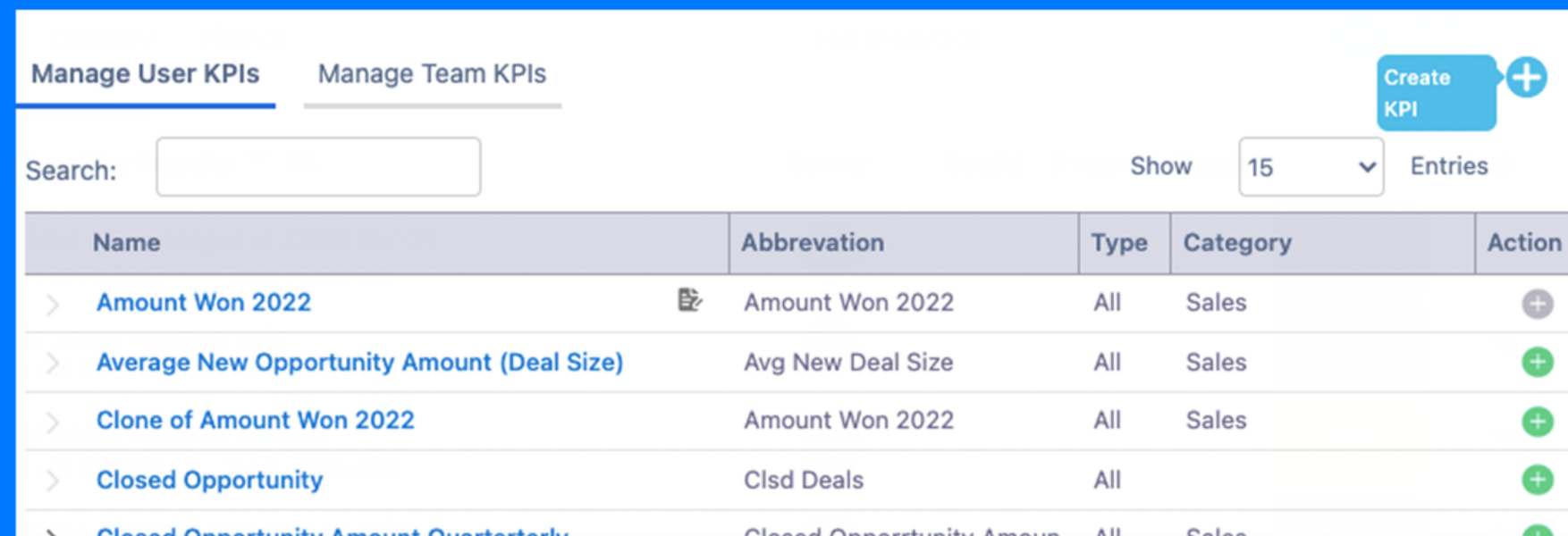
Name	Abbreviation	Type	Category	Action
> Amount Won 2022	Amount Won 2022	All	Sales	+
> Average New Opportunity Amount (Deal Size)	Avg New Deal Size	All	Sales	+
> Clone of Amount Won 2022	Amount Won 2022	All	Sales	+
> Closed Opportunity	Clsd Deals	All		+
> Closed Opportunity Amount Quarterly	Closed Opportunity Amount	All	Sales	+

Click the add button to pin KPI

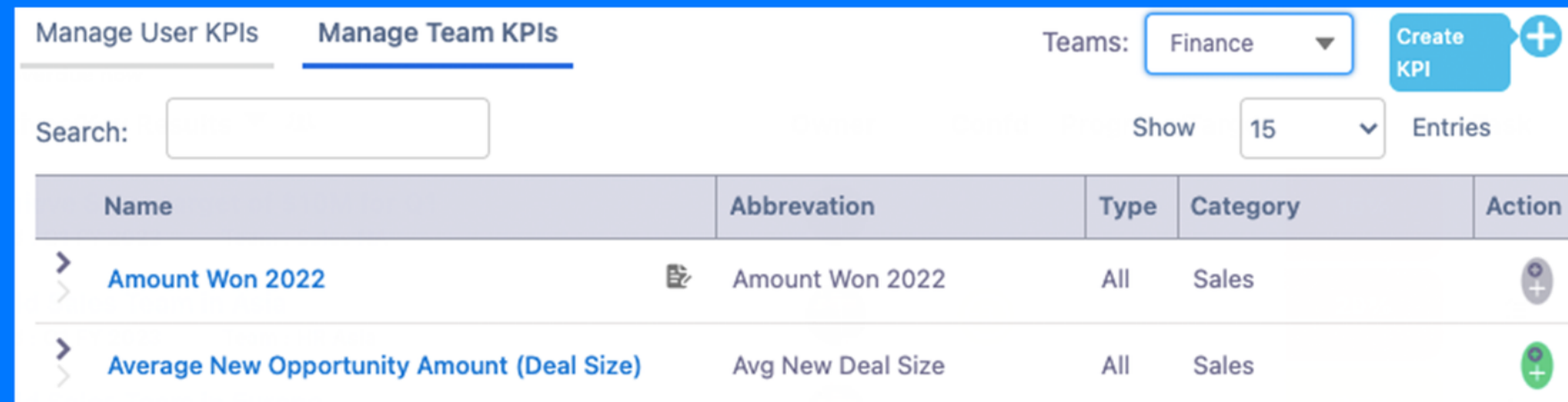
Pin (Hub)



KPIs can also be pinned by clicking pin icon from Hub

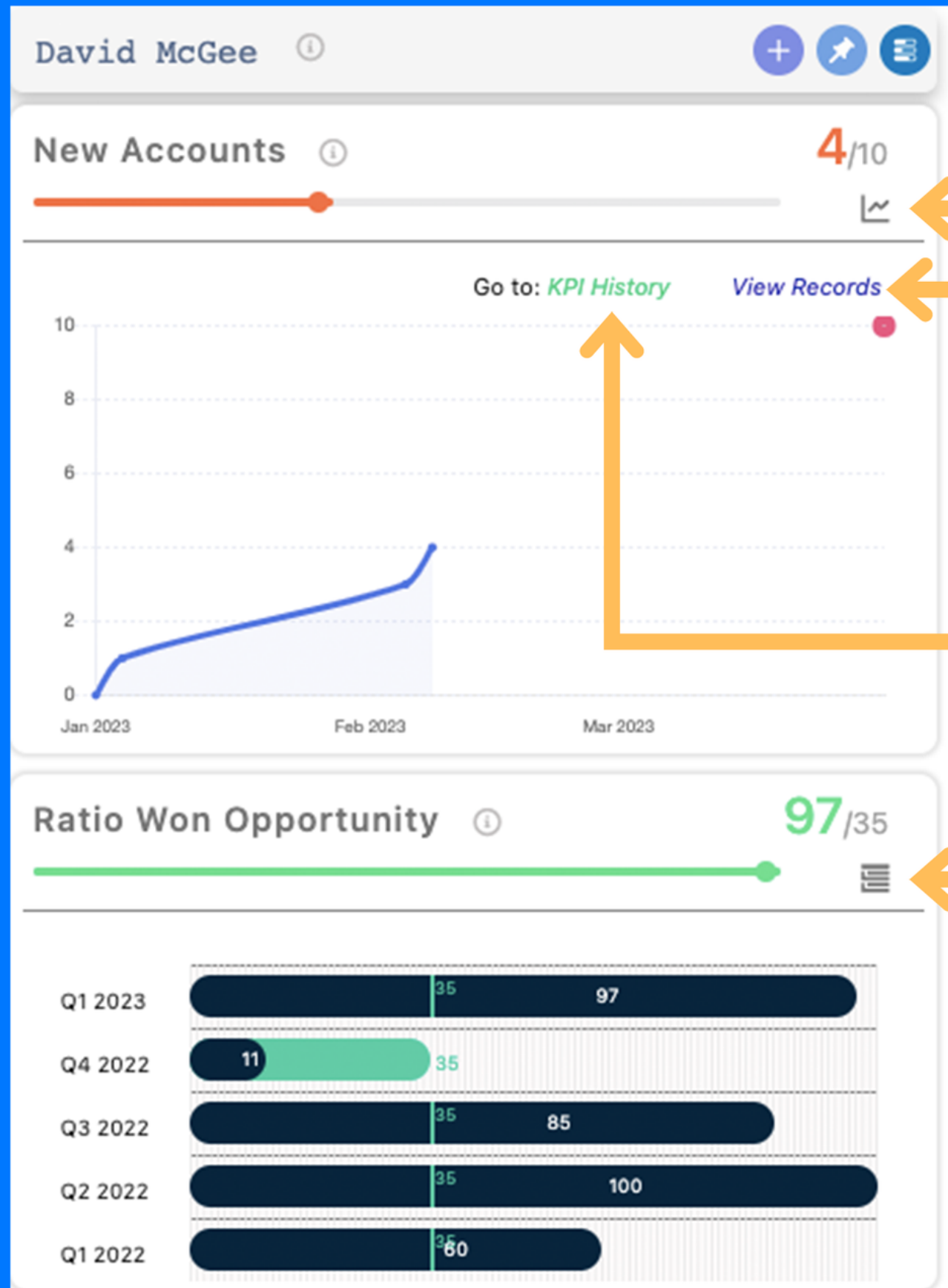


Under Manage user KPIs - Click add button to add a KPI to the user's My OKR (Max 5 KPIs)



Under Manage Team KPIs - Click add button to add a KPI to the team tab (Max 5 KPIs)

View KPIs



Click to view progress graph

Click to view records

Click to view History

Click to view history (Adv KPI - Progress graph not available)

KPI Board (12 Month history for all KPIs)

SCORECARD **KPI** OKR

John Connor ⓘ

+ ↗ 📊

Click to open KPI Board

	2023											
	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb
New Accounts	4.00 10		22.00 10			0.00 10			1.00 10			4.00 10
Ratio Won Opportunity	60.00 35		100.00 35			85.00 35			11.00 35			97.00 35
Clsd Opp Amount	7.5K 3M		18K 3M			152K 3M			7.1M 3M			1.5M 3M
Outbound Calls	0.00 20	0.00 20	0.00 20	0.00 20	1.00 20	0.00 20	0.00 20	2.00 20	0.00 20	6.00 20	0.00 20	0.00 20

Works both for User and Team KPIS

Key Points

01 Real-time Metrics

Track data from any Salesforce data in OKRify

02 OKRs & Scorecard

Use KPIs in OKRs to automatically update progress and Scorecard

03 Add KPI to User or Team

Set KPIs in OKRify Hub for user or teams to track key metrics for a user or a team



More OKRify Guides

Scorecard

Guide for Creating Scorecard, setting targets for multiple KPIs & users.

Create OKR

Guide for creating team & individual OKR with Number, Percent or Milestone Key Results

Create OKR 2

Guide for creating OKR with automatic progress update with Subject, KPI, Report or Linked OKR Results