

# How to use Salesperson segment-KPI reports in effectmanager

This guide shows you how to use the POS Salesperson Segment-KPI reports in the effectmanager Report module.

*This guide is only of relevance if you have the online POS reports module in effectmanager.*



The Salesperson Segment KPI provides you with a speedometer report, showing you how a Sales rep is performing compared to the overall segment index.

Data shown is Turnover Index YTD.

This POS report uses your own categorization on wholesaler POS data.

**NB!** If some products are not categorized with your own data, it will not be included in the Index calculations for the segment.

*If you need a guide that shows you how to maintain your product categorization, please see our guide [How to maintain categorization of POS data](#)*

The Salesperson Segment-KPI is available in two different reports. Below we will go through them.

- [Salesperson Segment-KPI Daily](#)
- [Salesperson Segment-KPI Weekly](#)

## Salesperson Segment-KPI Daily

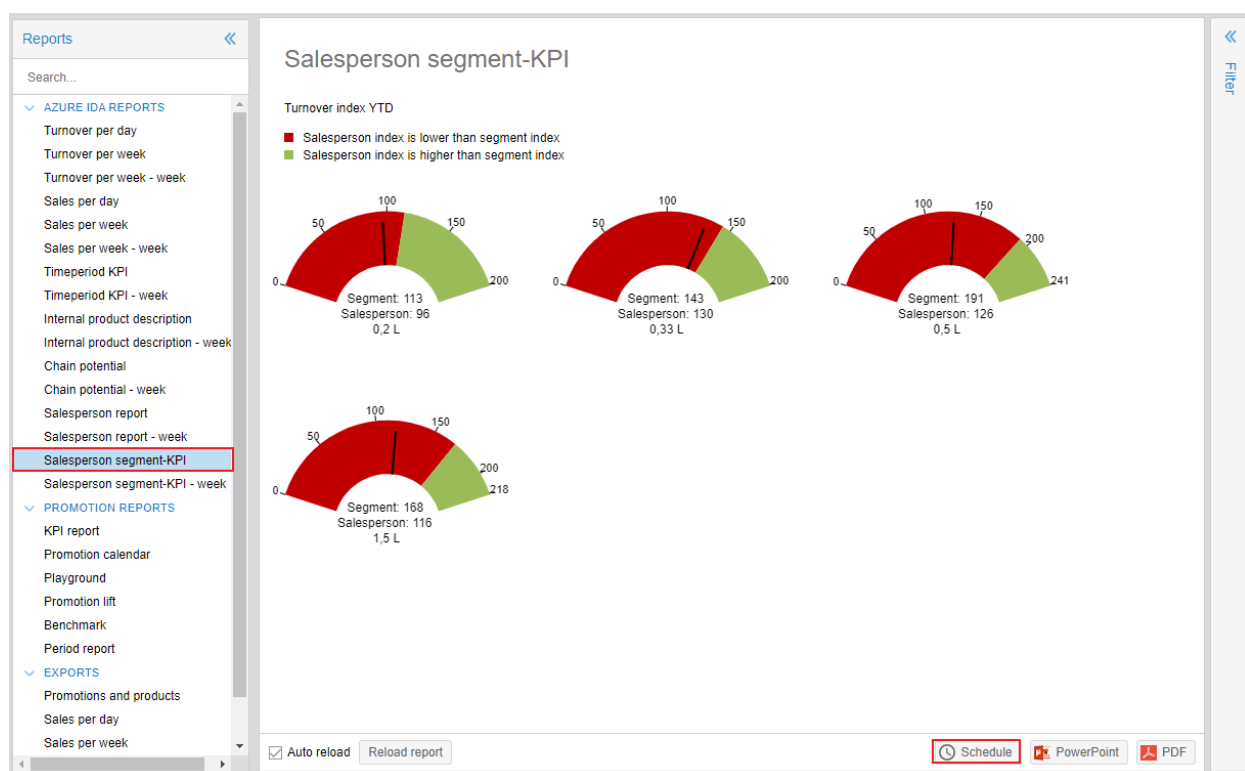
This POS report will provide you with a speedometer report based on your filtering selections comparing Turnover Index on your master data segments. The Salesperson Segment-KPI daily report allows you to choose the desired period using the day hierarchy. Whereas the [Salesperson Segment KPI - week](#) uses the week hierarchy and will always sum data on a weekly level.

Adding detailed category filters, allows you to see how a Sales rep is performing on a specific brand or product within your segments.

*If you need a guide that show you how to use filters in effectmanager please see our guide [How to use filters in effectmanager](#)*

In the example on the next page I have selected the Bilka chain for Salesperson Bjarne Pedersen in the period from 01/01-2020 to 18/01/2020 this will provide me with a report with all POS data from Bilka stores that Bjarne Pedersen visits. It will show the Turnover Index 01/01-2020 to 18/01/2020.

From the Salesperson Segment KPI, I see that the Turnover Index is lower in the stores Bjarne visits, compared to the Turnover Index in the whole Bilka Chain.



All POS reports can be exported to Excel, PowerPoint, and PDF by pressing the icons at the bottom of the report.

You also have the option to Schedule Reports for automatic send-out to yourself, your Sales reps or others. Using the dynamic filters is great for an automatic send-out of a POS report.

*If you need a guide that show you how to schedule reports in effectmanager, please see our guide [How to schedule a task/report in effectmanager](#)*

# Salesperson Segment-KPI Weekly

This POS report will provide you with a speedometer report based on your filtering selections comparing Turnover Index on your master data segments. The Salesperson Segment-KPI weekly uses the week hierarchy and will always sum data on a full week. Whereas the [Salesperson Segment-KPI Daily](#) allows you to select the period based on a daily period hierarchy.

In the example below I have selected Bilka Chain and Salesrep Bjarne Pedersen - from 01/01-2020 to 18/01/2020. Using the weekly hierarchy I will get a report from 30/12-2019 to 19/01/2020 (week52-week 3).

Try comparing the Turnover Index for Bjarne on 0,2L for the two reports with the same period selected - this illustrates that the week report always shows data for full weeks.

