

# **The KCI Module**

**TRACK EMPLOYEE REVENUE & CALCULATE COMMISSIONS**



# RentWorks

## Version 4

### KCI Module User Guide

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## Getting Started

### Setting Up Employee Records

Each employee that will be using the KCI Module must have certain fields set up in their employee record.

The Rate Of Pay field must be filled in for calculating the salary of the employee. The value can be either an hourly rate of pay or an annual salary. This will be specified later on in the KCI Settings screen.

The Working Hours fields are used to calculate the estimated number of hours that the employee will work in a month. Fill in the times for all the days that the employee works. For days that the employee does not work, put “0.00” for both the start and end times.

Dashboard \*Employees

General Schedule

Employee: 1 Jane Doe

Review Date: 10/01/2009 Rate of Pay: 15.00

Schedule As-Of: 06/23/2009

Working Hours

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Start:	0.00	8.00	8.00	12.00	8.00	0.00	9.00
End:	0.00	18.00	18.00	20.00	20.00	0.00	17.00

If the employee is a manager, select “Manager” in the Group list in the General screen. This will enable certain features that regular employees do not have.

### Commissionable Charges

In order for an employee to be paid commission on a charge, the charge must be flagged as commissionable. In the Misc. Rates and Charges screen there is a checkbox labeled ‘Commissionable’. This box should be checked off for all miscellaneous charges that are used in calculating an employee’s commission.

## Getting Started *(continued)*

### KCI Settings

The KCI Settings screen allows you to set parameters for the KCI Module.

Walk-up rentals can be handled differently from rentals with reservations. A walkup rental can be defined as a contract without a reservation. To do this, click on the “Contracts With No Reservation” box so it is checked-off.

You can also specify a certain source code to denote walkups. Choose that source code in the “Source Code” field.

Type	Code	Percent
Misc. Charge	BabySeat	100%
Misc. Charge	Phone	100%
CDW	CDW	0%
CDW	CDW000	100%
Upgrade	Upg	100%
Prepaid Fuel	Gas	100%
CDW	PDW	0%

Employee records contain a field for their rate of pay, which can be either a per-hour rate or an annual rate (see the “Setting Up Employee Records” section above). Use the “Employees’ Rate of Pay” radio-set to specify per hour or annual.

If you do not wish to pay commission on certain sources, you can exclude them. Use the “Add” and “Del” buttons to move source codes between the “Included” and “Excluded” source lists.

When calculating yield, you may not want certain charges to be added into the revenue total that is used. You can set the percentage of each charge to be used in the revenue total for yield. For example, fuel can be set to 25% so only a quarter of the fuel revenue is added into the total. To completely exclude a charge, set the percentage to zero.

## Getting Started *(continued)*

### Commission Levels

The commissions that employees receive are set up in the Commission Levels screen. Commissions can be a percentage or a flat amount.

The Month/Year fields specify to which month and year this commission level applies. The Charge Type field can be used to create commission levels for a specific charge or for all charges.

The Location list box allows you to assign different commission levels to each location. You can select multiple locations, or select “All” for all locations.

The Source list box works the same way as the Location list. Each source can have different commission levels, or the levels can apply to all sources.

The ‘Amt/Unit’ field allows you to specify a piecewise commission amount. For every item the employees sell, they will get the amount in this field.

To set up commission levels based on percentage, use the Commission Tiers browser. The tiers can be set up by total revenue or by yield, depending on the “By” radio-set. In the fields below the browser, enter the revenue/yield and the percentage, then click ‘Add’ to add the level to the browser. You can remove a level by highlighting it in the browser and clicking ‘Del’.

Month/Year: June 2009

Charge Type: All

Amt/Unit: 0.00

Location: All

Source: All

By:  Revenue  Yield

Yield	Comm. Pct.
250.00	5%
500.00	10%
1,000.00	20%

Add Del

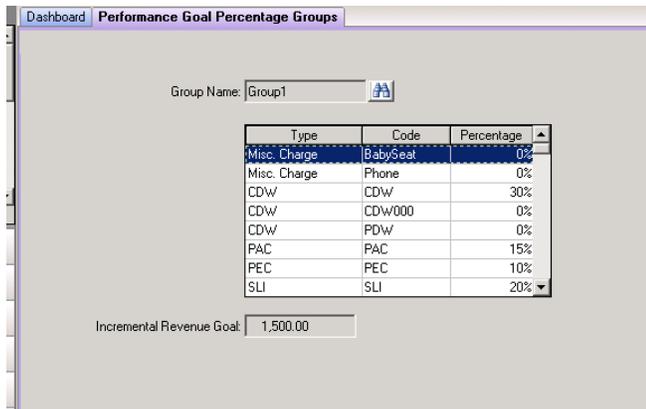
250.00 5

## Setting Goals

Every month, each employee is assigned a certain incremental (commissionable charge) revenue goal. As contracts are closed, the revenue information is used to update the employee's achievements. Each employee can view their goals and achievements to see how they are doing.

### Performance Goal Percentage Groups

If certain revenue goal percentages are used often, the Performance Goal Percentage Groups screen makes it easy to apply "pre-packaged" goals to employees. Give the group a unique name in the 'Group Name' field. The browser lists all of the commissionable charges. Change the value in the 'Percentage' column to specify the penetration percentage that is to be achieved.



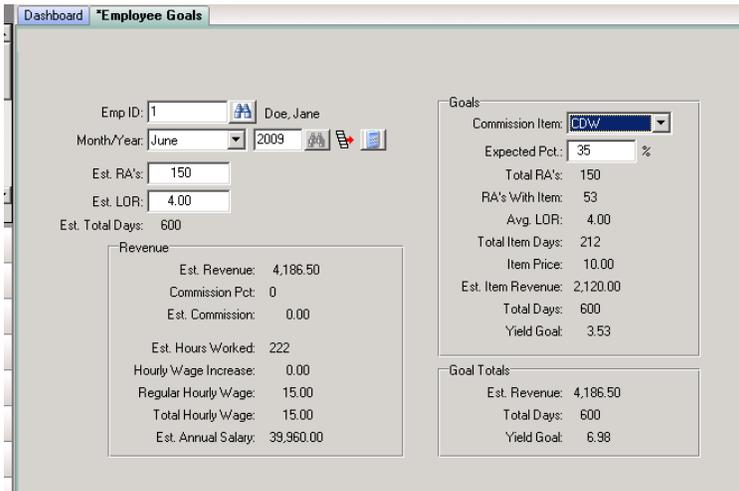
### Employee Goals

The monthly incremental revenue goals are assigned to each employee using the Employee Goals screen. Enter the employee number in the 'Emp ID' field (or use the binocular lookup) and then the month and year in the 'Month/Year' fields.

The 'Est. RA's' field is the estimated number of contracts that the employee will open during the month. This field is filled in with the value calculated from the previous month's data. The value can be changed if needed.

The 'Est. LOR' field is the estimated average length of rental for each contract. This field is also filled in with the value calculated from the previous month's data and can be changed.

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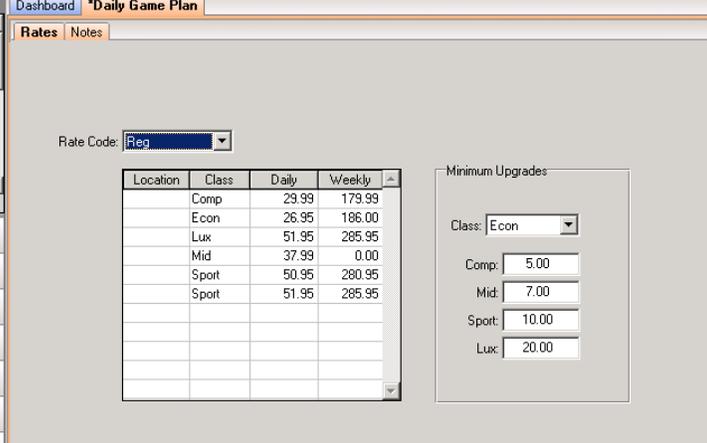
## Setting Goals *(continued)*

On the right side of the screen is the goal for each incremental item. Choose a charge from the 'Commissionable Item' list. In the 'Expected Pct' field, enter the penetration percentage goal for the charge. The fields below will be automatically updated with revenue/commission information based on that percentage.

In the toolbar is a button for applying a goal percentage group. It has this icon:  A browser is displayed from which you can select a percentage group. The expected percentages are updated for each commission item with the values defined in the group.

### Daily Game Plan

The Daily Game Plan screen is used to set up the day's walkup rates and class upgrade amounts. Choose the walkup rate code in the 'Rate Code' field and edit the daily and weekly rates in the browse. For class upgrades, choose a class in the 'Class' browser and edit the alternate class upgrade amounts in the fields below.



Location	Class	Daily	Weekly
	Comp	29.99	179.99
	Econ	26.95	186.00
	Lux	51.95	285.95
	Mid	37.99	0.00
	Sport	50.95	280.95
	Sport	51.95	285.95

Minimum Upgrades:

Class: Econ

Comp: 5.00

Mid: 7.00

Sport: 10.00

Lux: 20.00

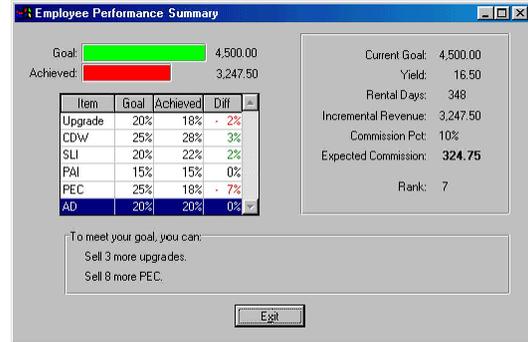
The 'Notes' tab has fields for entering the managers and supervisors for the day, and any other applicable notes.

## Tracking Performance

Employees can track their revenue achievements any time they want. The revenue information is kept for each employee and is updated as each contract is closed.

### Employee Performance

The Employee Performance shows the employee's revenue achievements month-to-date. The graph in the top-left charts the revenue goal and the achieved revenue amount. The browser below the graph shows a breakdown of the penetration percentages for each incremental item. The goal percentage and achieved percentage is shown, and the difference is shown in green if the goal has been achieved, or red if it has not been achieved.



The bottom of the screen displays suggestions on how the employee can meet the incremental goals. The number of incremental items needed to reach the penetration percentage goal are listed so the employee can focus in on those items for future contracts.

The right side of the screen summarizes the rental activity so far this month. The estimated commission is calculated, and the rank shows the employee where they stand compared to all other employees.

### CSR Coaching and Feedback

The CSR Coaching and Feedback form is used to evaluate employees' performance at the counter. It consists of a series of items to watch for and a checkbox to denote whether or not the employee has satisfied the item. There is also a place to record any notes or suggestions the observer might make.

This screen is only available with the Khoury Advanced feature code.

## Reporting

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### Daily Rental Log

The Daily Rental Log shows the contracts that were opened during the report's date range. Any combination of sources can be selected in the Source list. Revenue days, commissionable revenue, and yield is shown for each contract. The report splits out rentals with reservation and walk-up rentals in separate sections.

If the user is a manager, the 'Employee #' field is enabled and can be changed. Otherwise, the user running the report can only see his or her own contracts.

### CSR Coaching & Feedback Report

The CSR Coaching & Feedback Report provides a summary of the feedback forms for a certain date range. For each item, a total number of checked and non-checked boxes is shown, along with the percentage of checks. This can be used to pinpoint deficiencies in a certain area.

If the user is a manager, the 'Employee #' field is enabled and can be changed. Otherwise, the user running the report can only see his or her own contracts.

### Class Substitution Report

The Class Substitution Report is used to find contracts that have a different class than the reservation. The report shows the reservation's class and rate along with the contract's class and rate. The difference between the two rates is listed in the "Upgrade/Day" column.

### Incremental Report

The Incremental Report summarizes the commissionable items on contracts. A date range and employee range can be chosen, along with certain locations and/or sources. Each source can be shown separately or all sources can be consolidated.

For each employee, the report lists each incremental item along with the number sold, penetration percentage, revenue days, total revenue, and yield.

## **Reporting** *(continued)*

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### **Commission Report**

The Commission Report is used to calculate the final monthly commission amount for employees. The report allows you to select a date range and sources. It can show incremental details for each contract, a commission summary for each contract, or a commission summary for each incremental.

The 'Commission Type' column shows the kind of commission that was found for this item in the Commission Levels setup. The amount is what was calculated with that commission level and revenue total.

If the user is a manager, the 'Employee #' field is enabled and can be changed. Otherwise, the user running the report can only see his or her own contracts.

## Monthly Procedures

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Certain records need to be set up on a monthly basis. Before the first day of each month, you will need to take the following steps:

1. Go to the Commission Levels screen. Select the record for the current month and use the Clone toolbar button to make a duplicate of this record. Change the Month field to next month. Make any changes that you wish to the values and click on the Save toolbar button.
2. Go to the Employee Performance Goals screen. For each employee that has an incentive plan, select the record for the current month and use the Clone toolbar button to make a duplicate of this record. Change the Month field to next month. Make any changes that you wish to the goals and click on the Save toolbar button.

The KCI Module is now set up for the next month.