

How to link vimiGoal with vimiTeam?

To copy and link an individual vimiGoal, you **must meet the following conditions**:

1. The users of the selected goal set must **belong in the same team**
2. The **date** of the selected goal set **must be the same** or **within the team's start and end dates**

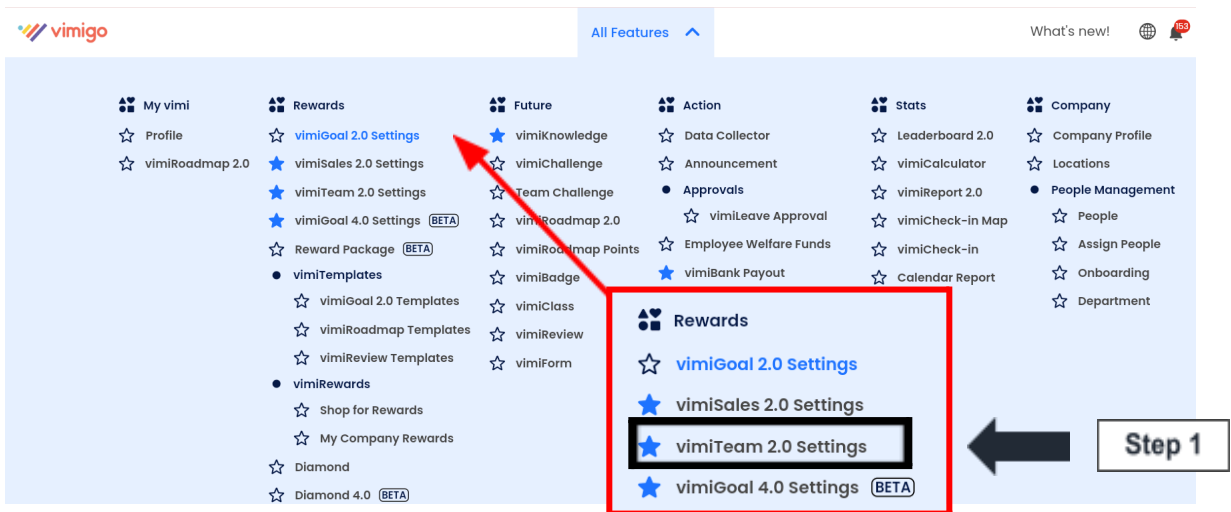
*** Please take note, if the selected goal set has **an existing closed record on the previous month(s)**, **only the current and future active records will be copied into the team**.

Scenario Example

The screenshot shows the 'Individual Goal Setting' interface. At the top, there are fields for 'Period' (set to 'Monthly'), 'Start Date' (07/01/2020), and 'End Date' (12/31/2021). Below these is a 'Repetition' field with the value '18'. A calendar view at the bottom shows months from Jan to Dec, with 'Jul' highlighted in red. A red arrow points from the text 'Current and future active records will be copied and extracted into the team' to the 'Jul' button. Another red arrow points from the text 'Closed records will be kept and remain in Individual vimiGoal' to the 'Jun' button.

Based on the month the linking process takes place, i.e July 2021, the system will only copy and extract records from Jul 2021 to Dec 2021 into the team. While the previous closed record(s), Jul 2021 to Jun 2021 will remain intact in Individual vimiGoal.

Step 1: Head over to **All Features** Tab at the top of the website Under **Rewards** list, click on **vimiGoal 2.0 Settings**.



Step 2: vimiTeam 2.0 settings Select **New vimiTeam**.



Step 3: vimiTeam title > Give your vimiTeam a title.

vimiTeam 2.0
Home > vimiTeam 2.0 settings > vimiTeam information

1 vimiTeam Information Step 1 of 4

2 Set vimiGoal Step 2 of 4

3 Set vimiGoals Step 3 of 4

4 vimiTeam Settings Step 4 of 4

vimiTeam Title

Insert vimiTeam name...

Step 3

Step 4: **Select Template** Select a template to decide which **formula** to be used.

Select Template ?

Saloon 🔧	Retail 🛒	Manufacturing 🏭
F & B 🍔	Property 🏠	MLM 📊
Designer 📊	Services ⚡	Custom 🚀

Formulas Used

Mouse over or select a template from the left to see formulas used to calculate the commission

Step 4

Step 5: Additional Settings Enter all the details (**Start Date, End Date, Period, Repetition, Type & Mission Type**).

* **Type**: There are 2 **Type** to be selected (**Sales & Services**).

Sales type will have vimiSales but **Services type do not have vimiSales**.

* **Mission Type**: There are 3 **Mission Type** to be selected (**MYR, QTY & DAY**).

Additional Settings

Start Date ?

dd/mm/yyyy

End Date ?

dd/mm/yyyy

Period ?

Monthly

Repetition (Maximum 99) ?

Type ?

Sales

Mission Type

\$

Exclude Goal

No

Step 5

*** Please take note, to link an individual vimiGoal, the **date of the selected goal set must be the same or within the teams start and end dates**. ***

Step 6: **Employees Assigned** Select the employees for the **vimiTeam** **Next** button.

Employees Assigned (3)

+ AH AM AL

Active Select Department Search by Name [Select All](#) [Deselect All](#)

Esther - Moderator vimiGo 3.0	Aditya Kumar Production Operator	Admin 06 Customer Service	Admin 08 Sales Department	Adrian Kok Business Development
Adrian Kok Sales Department	Aisyah Nur Production Operator	Ang Chen Eam Sales Department	Ang Wan Ting Sales Department	Ann vimiGo 3.0
Ann Wang Sales Department	Annie Sim Wan Theng Sales Department			

283+

[Back](#) [Next](#) [Need Help?](#)

Step 7: Click **Link a individual vimiGoal**.

vimiTeam 2.0

Home > vimiTeam 2.0 Settings > vimiTeam information > Set vimiGoal

vimiTeam Information Step 1 of 4 **2 Set vimiGoal** Step 2 of 4

vimiGoal 2.0

[Create New vimiGoal](#) + [Link a individual vimiGoal](#) **Step 7**

Goal 1	Goal 2	New Goal
Edit	Edit	Edit
Start Date 1 May 2024	Start Date 1 May 2024	Start Date 1 May 2024
Period Monthly	Period Monthly	Period Monthly
End Date 30 Apr 2025	End Date 30 Apr 2025	End Date 30 Apr 2025
vimiGoal	vimiGoal	vimiGoal
Points / %	Points / %	Points / %

Step 8: Select a **vimiGoal** that you want to **link with vimiTeam**.

vimigo All Features v What's new!

vimiTeam 2.0 - New Team 2022

Home > vimiTeam 2.0 Settings > vimiTeam information > Set vimiGoal > Link vimiGoal

Select A vimiGoal to Link @

All Status Search by Name Filter

NAME	NO OF VIMIGOAL	NO OF REWARDS	STATUS	CREATED AT	START DATE	END DATE	INTERVAL	Step 8
HR - copy - copy	3	1	Draft	29th Jan 2022, 12:55 AM	1st Jan 2022	31st Dec 2022	Monthly	Preview Select
Goal 2	2	2	Draft	4th Feb 2022, 10:24 PM	1st Feb 2022	31st Dec 2022	Monthly	Preview Select
Goal 1	2	2	Draft	4th Feb 2022, 10:26 PM	1st Feb 2022	31st Dec 2022	Monthly	Preview Need Help ?

Step 9: A message stated **“You are trying to link and copy “xxx” from Individual vimiGoal to this team, “xxx”. This action is not reversible. Are you sure you want to continue?”** will appear. Click **“OK”**.

admin.vimigoapp.com says

You are trying to link and copy "HR - copy - copy" from Individual vimiGoal to this team, "New Team 2022".

This action is not reversible. Are you sure you want to continue?

Step 9 → **OK** Cancel

Step 10: A message stated '**Successfully linked xxx to xxx**' will appear on the upper right side.

