

Phorest

Add Ons; Staff and Team
Goals and Staff Goals Report



Presented by

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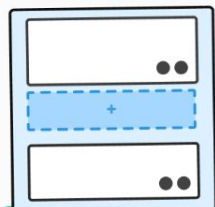
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Dixon
Educator





Contents:

1. Add Ons
 2. Team & Staff Goals May Chat
 3. View the progress of a Staff or Team Goal
- 



Upselling

Add On Services

Services

Message - Full Body with Rich >

Paddy's Room

09:30 30min \$50.00 RQ

Appointment finished at 10:00

Sam's Hot Stone Add On with Rich Add-on >

10:00 30min \$50.00 RQ

Appointment finished at 10:30

Add service

Services > Hot Stone Add On [Add-on](#)

General Staff **Linked Services**

15:15
16 Jan

Linked Services

Choose which services you want linked to this Add-On service. When the services below are added to an appointment, this Add-On service will be presented as a suggestion, both in your Appointments screen as well as Online Booking.

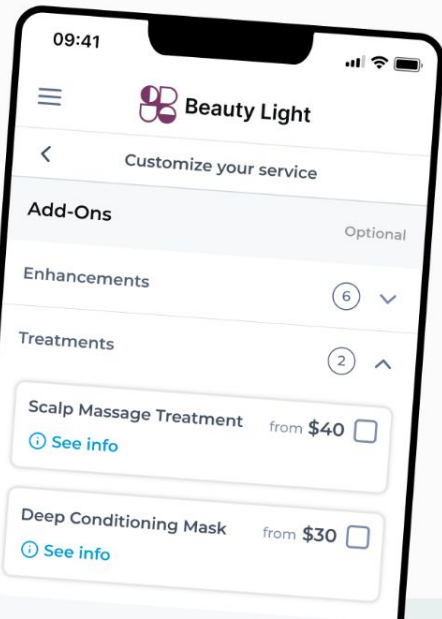
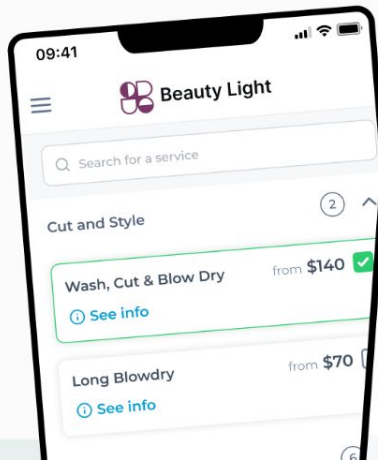
Service	Not linked	Linked
Link all Services in Category	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Classic Facial	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Foot massage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Full Body Massage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Full Body wrap	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Massage - Full Body	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Laser Pigmentation

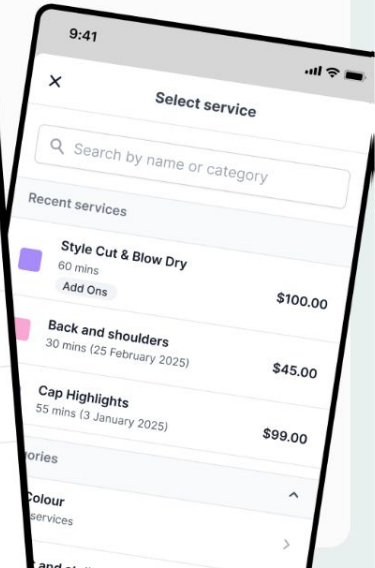
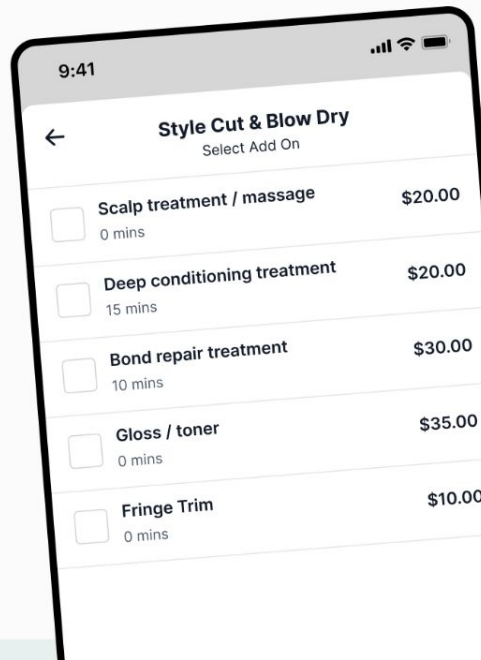


Online & Offline

Clients see add ons when booking online



Staff see add ons available in Phorest





What do I need to know?

Add Ons are included in all Phorest packages

What are Add Ons?

Add-on services are optional extras linked to a main (primary) service. They let clients personalize their booking by adding enhancements, such as a conditioning treatment or a lip mask.

Types of Add on Services

A standalone service

This can be booked by itself as a service or can be used as an add on

An add on only service

This cannot be booked by itself, it must accompany another booked service,

Can be 0 mins in length

Tip: Add ons are currently not included with Special Offers; Courses or Packages

Setting up Add Ons:

Hair Treatment

- \$50
- 0 min
- Is an add on to any cut or blow dry
- Is an add on only

Let's set up 2 examples

Is this service an add-on only?

When enabled, clients cannot book this service on its own. It must be combined with a primary service.

No

Yes

LED Treatment

- \$75
- 15 min
- Is an add on to any Facial or can be booked alone

K18 Add On

Hair treatments

0 mins

\$15.00

Add-on Only

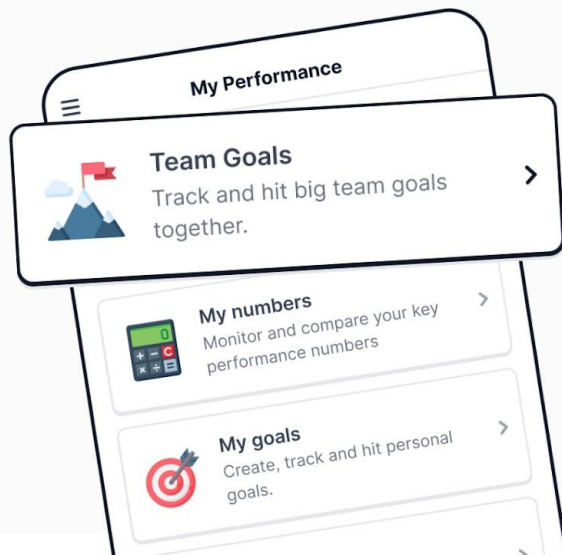


Introducing

Team Goals



Top of your wishlist!





Team Goals what do I need to know

Q: How much is it?

It is included in the following packages: Complete advantage, Complete advantage plus, Aesthetics Advantage & Aesthetics advantage plus

If you already have Staff Goals you will have Team Goals also.

Q: How does it work?

Setting up Team Goals



Individual goals are great... but

Businesses win together



A feeling of
"We're all in this together"



Imagine if..

This data was on
Phorest Go

Everyone can
see the target

Everyone can see
real-time progress

When someone makes
a retail sale, the
whole team goal
moves forward

You celebrate
together



Team Goals

How it works!

My Performance

- Team Goals: Track and hit big team goals together.
- My numbers: Monitor and compare performance numbers.
- My goals: Create, track and hit goals.
- My reviews: Monitor and compare performance numbers.

Team Goals

Create a team goal

Only managers can create team goals

2 Active Upcoming Closed

5 days left

January Services 🍷

5 days left

January Retail 🍷

Who has...

Managers only: Perfect for tracking privately—without sharing.

Participants: Managers and people can see it. They'll see things are going on and have contributed.

Everyone: Anyone with access can see on progress—even if they're not a manager.

All our Services

Only managers can view this goal

Team progress

\$3,480 / \$12,000

\$797.77: Daily team average

12 January 2026: Team's best day (\$880.10)

All contributions: Only managers can see this

How to hit this goal: Achieve \$12,000 in service sales in 7 days.

All contributions

The average contribution is \$180

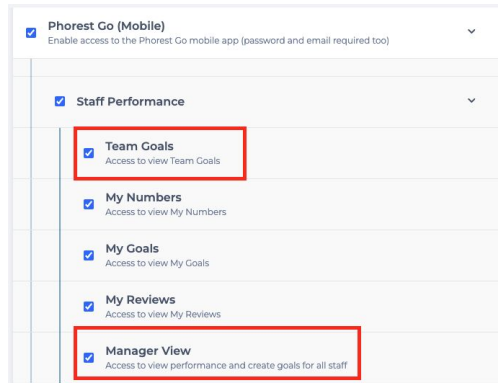
Participants	Total Service sales
Roberta	\$300
Frankie	\$250
Lauren O Neill	\$196
Alice Marrone	\$101
Rebecca F.	\$99

Access

Manager View allows you to create a Team Goal. If you do not see this option, please check your Access permissions.

There are two access permissions related to Team Goals: *Team Goals* and *Manager View*.

You need the Team Goals permission to see the **Team Goals** section in PhorestGo, and the **Manager View** permission to create a Team Goal.





Team Goals

- **Managers Only:** Only your management team can view the goal and track its progress (*staff with Manager View access*).
- **Participants:** Only staff added to the goal can view it.
- **Everyone:** All staff can view the goal.

Who has access?

Step 1 of 3

Managers only

Perfect for tracking team or business goals privately - without sharing to the wider team.

Participants

Managers and people added to this goal can see it. They'll see their own progress and how things are going overall, but not what others have contributed.

Everyone

Anyone with access to Team Goals, can keep an eye on progress—even if they're not part of it.



Staff Goals

Great effort!
Time to sell stuff
 22 Feb 2025
 88%
[View results](#)

My Numbers

Message from Phorest
 Hi Mandy, we're really pleased to... [Read](#)

Mandy Metcalfe

Numbers for:
 month
 month last year
 9%

Numbers
 \$4,453.75 **+\$192.65**
 86 Service sales

Numbers
 \$155.10 **+\$48.90**
 7 Retail sales

Cat-astrophe!
This'll never work!
 14 May 2025
 9%
[View results](#)

My Performance

My Numbers
 Monitor and compare performance numbers

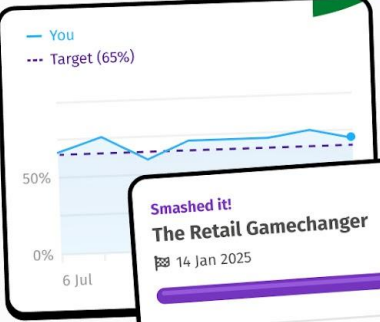
My Goals
 Create and hit personal goals.

Feedback & FAQs

Hi Laura,
 Our goal is to make your day more enjoyable, more successful and to help you connect with clients. For that reason we've added the **My Performance** section.

As always, we'd love to hear your guidance and feedback.

You're a unicorn!
New Year, New Me
 1 Jan 2025
 132%
[View results](#)



Smashed it!
The Retail Gamechanger
 14 Jan 2025
[View results](#)

Maybe next time!
Vegas or Bust!
 14 Mar 2025
 62%
[View results](#)

+\$192.65

-\$48.90



View the progress of a Goal

You can view the progress of a Team and or Staff Goals on the PhorestGo app under My Performance or via the Staff or Team Goal Report in the Insights Report Dashboard:

The screenshot displays the PhorestGo app's Insights Report Dashboard. On the left, a sidebar menu lists various reports, with 'Team Goals' highlighted in blue. The main content area shows a 'Team Goals' report for the branch 'is Training AUS 3 with Kath n Kim - Locatio...'. The report includes a table with columns for Branch Name, Goal Name, Start Date, End Date, Duration, Days Complete, Days Remaining, Status, Trackable Metric, Trackable Unit, Team Goal Amount, Reward, Daily Average, Completed Amount, and Goal Percentage. The table contains four rows of data for different goals.

Branch Name	Goal Name	Start Date	End Date	Duration In Days	Days Complete	Days Remaining	Status	Trackable Metric	Trackable Unit	Team Goal Amount	Reward	Daily Average	Completed Amount	Goal Percentage
Training A	Team pampering	2026-05-...	2026-05-...	8	1	7	Active	SERVIC...	MONET...	4,000	Service ...	0.00	0.00	0.00%
Training A	Retail team goal xo	2026-05-...	2026-05-...	8	1	7	Active	RETAIL...	MONET...	10	Team g...	1.14	1.14	11.40%
Training A	Retail team goal xo	2026-05-...	2026-05-...	7	4	3	Active	RETAIL...	QUANT...	10	Team g...	4.00	16.00	160.00%
Training A	Team Goal here xo	2026-02-...	2026-05-...	101	91	10	Active	SERVIC...	MONET...	5,000	0	801.38	72,925.60	1458.51%

Help Sheets

1. [Add Ons](#)
2. [Team Goals](#)
3. [Staff Goals](#)
4. [Tracking the progress of a Goal](#)

Missing Features?
[Click here](#)

Phorest Grow Homepage
[Click Here](#)