How to Create Global Targets

Adam Field - 2026-05-13 - Comments (0) - Configuration

How to Set Up Targets

This guide demonstrates how to create and configure targets in Yao. Targets allow you to set and manage monthly goals for chargeable and non-chargeable hours across your firm.

Link to Video Guide: https://youtu.be/EjFYEG359ic?si=7cQRYVCoYKVK4FnT

Overview

- Targets page displays monthly targets for chargeable and non-chargeable hours
- Set Global Targets to define firm-wide billing and hours targets
- Set User Targets to configure individual attorney targets

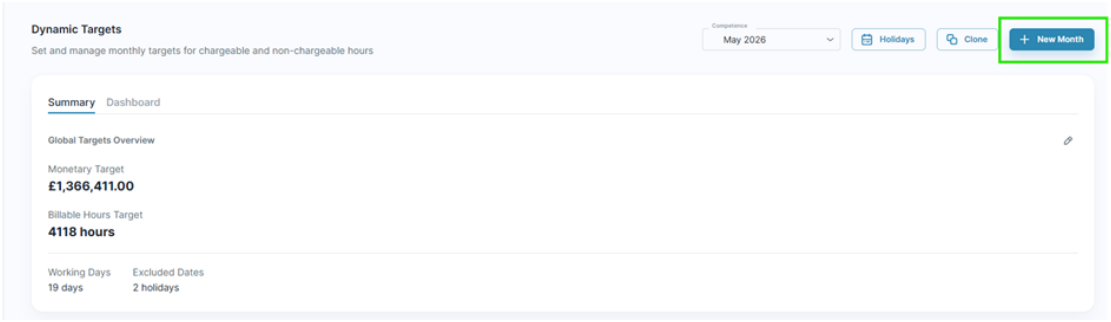
How to Access Targets

- From the left sidebar menu, click on the **Targets** menu
- The Dynamic Targets page will open, showing the **Summary** tab by default
- You will see the **Global Targets Overview**, which displays the **Monetary Target** and **Billable Hours Target**

Creating New Targets

To create targets for a new month, follow these steps:

1. Click the **+ New Month** button at the top right of your screen



2. The **Create New Targets** modal will open

3. A month selector at the top shows which month you are creating targets for

4. If you need to create targets for a different month, close this modal and select a different month

Setting Global Targets

Within the Create New Targets modal, the Global Targets section allows you to set firm-wide targets:

- **Target Billing** field: Enter the monetary target (e.g., £120000). The field includes a placeholder format example
- **Target Hours** field: Enter the total billable hours target for the firm
- **Excluded Dates (Holidays)** section: Click the **Show Calendar** button to select holidays or dates to exclude from the working days calculation
- **Suggested Global Targets:** A helpful section displays suggested targets based on current attorney configurations and working days. An **Apply** button allows you to use these suggestions

Understanding Suggested Targets

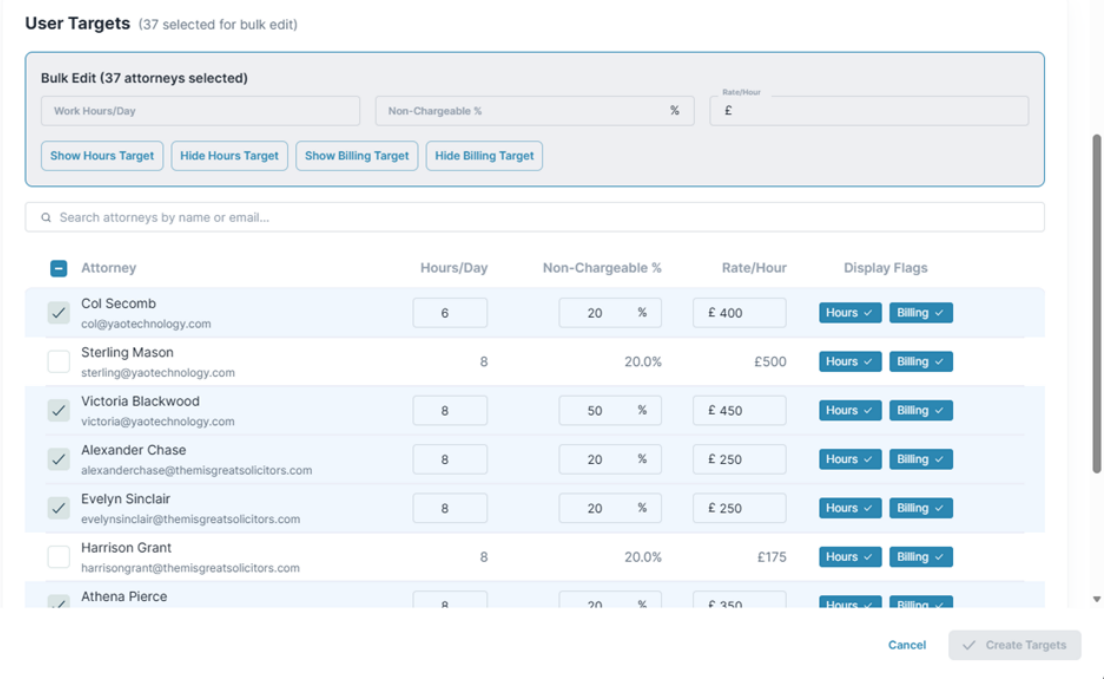
- **Suggested Billing:** Shows the calculated billing target based on attorney rates
- **Suggested Hours:** Shows the calculated billable hours target
- **Attorneys:** Displays the count of attorneys included in the calculation

Setting User Targets

Below the Global Targets section, the User Targets section allows you to set individual attorney targets:

- A search field allows you to search for attorneys by name or email
- A table displays all attorneys with the following columns:
    - **Attorney:** Name and email of the attorney

- **Hours/Day:** Number of billable hours expected per day
- **Non-Chargeable %:** Percentage of hours allocated to non-billable activities
- **Rate/Hour:** Hourly rate for the attorney
- **Display Flags:** Shows flag indicators (e.g., **H** for Hours display)



Bulk Edit Feature

The modal supports bulk editing when multiple attorneys are selected:

- Select multiple attorneys using the checkboxes on the left side of each row
- The bulk edit section appears above the attorney list, showing **Bulk Edit (X attorneys selected)**
- Available fields for bulk editing include:
  - **Work Hours/Day:** Update hours for all selected attorneys
  - **Non-Chargeable %:** Update the non-chargeable percentage
  - **Rate/Hour:** Update hourly rates
  - **Display flag toggles:** Show or hide Hours Target and Billing Target columns

Completing Target Creation

- After configuring Global and User targets, click the **Create Targets** button

- The targets will be saved for the selected month
- You will be returned to the Targets page, where the new targets will be reflected in the summary

Cloning Targets

Yao provides a **Clone** feature to quickly replicate targets to other months:

- Click the **Clone** button on the Targets page
- A **Clone Targets** modal will appear
- The modal displays what will be cloned:
    - Global targets (billing & hours)
    - Workday rules (excluded dates & working days)
    - All attorney configurations (hours/day, rates, ratios, flags)
    - All calculated targets (daily, weekly, monthly)
    - A note states: *This will be done automatically. No configuration step needed.*
- Select the target month to clone from using the **Clone from** dropdown
- Select the destination month using the **Select Target Month** field
- Click the **Clone Targets** button to complete the cloning process

Key Information

- The Targets page always displays the current month at the top
- A **New Month** button allows you to quickly create targets for an additional month
- The **Summary** tab displays Global Targets Overview with Monetary Target and Billable Hours Target
- Working Days and Excluded Dates are visible on the Summary tab
- A **Recalculate** button is available to recalculate targets based on updated attorney configurations
- The Targets page updates automatically when new targets are created or cloned