

Universal Awning & Canopy

Department Goals Tracker

RULEBOOK

universalawning.netlify.app

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1. OVERVIEW

The Universal Awning Department Goals Tracker is an internal tool used by department heads to set, track, and update their 30, 60, and 90-day goals each cycle. All submissions are automatically logged to Google Sheets.

Team Members

Name	Department
Brian Yanuaria	Estimating
Cody Clapp	Corporate
David Andrews (Deacon)	Estimating
David Makharadze	Corporate
Jacob Stephens	Tech Ops
Jessica Johnson	Operations
Larry May	Finance
Matt Garbe	Sales
Will Janke	Installation

2. GOAL PERIODS & DUE DATES

IMPORTANT: The Goal Period is the START DATE of the cycle — not the due date. Goals are due approximately 30, 60, and 90 days AFTER the goal period start date.

How Due Dates Work

Each goal period has three tiers. The due dates for each tier are the next three goal periods following the start date.

Goal Period (Start Date)	30-Day Due (approx.)	60-Day Due (approx.)	90-Day Due (approx.)
August 27, 2026	September 24, 2026	October 29, 2026	November 11, 2026
September 24, 2026	October 29, 2026	November 11, 2026	December 2026
October 29, 2026	November 11, 2026	December 2026	January 2027
November 11, 2026	December 2026	January 2027	February 2027

The due dates shown in the form update automatically when you select a goal period.

3. HOW TO FILL OUT THE FORM (STEP-BY-STEP MAP)

STEP 1

YOUR INFO

Full name Department

Select your name Auto-fills from name

Select Your Name

Choose your name from the dropdown.

Your department will auto-fill and lock automatically.

You cannot change the department, it is tied to your name.

STEP 2

Submission type Goal period Today's date

New goals (month s) Select period 08/28/2026

Select Submission Type

Choose the appropriate type:

- New Goals (month start)
First submission for a new period
- Mid-cycle update
Progress check midway through the period
- End-of-month review
Final review at the end of the period.

NOTE: Submission types must follow the correct order. See [Section 4 for prerequisites](#).

STEP 3

Submission type	Goal period	Today's date
New goals (month ϵ $\downarrow$)	Select period $\downarrow$	08/28/2026 $\square$

Select the Goal Period

Choose the current goal period from the dropdown.

Remember: this is the START DATE of the cycle.

The goals section will unlock once you select a period.

Due dates on each goal card will update automatically.

STEP 4

CURRENT PERIOD GOALS

Latest submission

Type: End-of-month review

30-DAY GOAL

- Testing Follow Up with Cody Functionality - Please Review and Complete Cody ✓ Completed
- Extension: TRIAL EXTENSION
- clicked completed after having extension, check if extension note is still there

60-DAY GOAL

- 60-day due oct 29 ✓ On track

90-DAY GOAL

- 90-day due nov 11 ✓ On track

YOUR INFO

Full name Department

Submission type	Goal period	Today's date
New goals (month ϵ $\downarrow$)	August 27, 2026 $\downarrow$	08/28/2026 $\square$

Check Your Previous Submission

If you have submitted before for this period, your goals will pre-fill automatically. Review the “Current Period Goals” summary panel at the top of the form for reference.

STEP 5a

Submission type	Goal period	Today's date
New goals (month ϵ $\downarrow$)	August 27, 2026 $\downarrow$	08/28/2026 $\square$

GOALS & COMPLETION STATUS

$\triangle$ Enter one goal per field. Use the "+ Add Goal" button to add more goals. Set a status and notes for each individual goal.

30-day goal

Due: Sep 26, 2026

+ Add 30-Day Goal

60-day goal

Due: Oct 26, 2026

+ Add 60-Day Goal

90-day goal

Due: Nov 25, 2026

+ Add 90-Day Goal

Enter or Update Your Goals

For New Goals: Enter ONE goal per field.

Use the “+ Add Goal” button to add more goals.

Each goal gets its own status button and notes field.

STEP 5b

Submission type: Mid-cycle update | Goal period: August 27, 2026 | Today's date: 08/28/2026

GOALS & COMPLETION STATUS

⚠ Enter one goal per field. Use the "+ Add Goal" button to add more goals. Set a status and notes for each individual goal.

30-day goal | Due: Sep 26, 2026

Testing Follow Up with Cody Functionality - Please Review and Complete Cody 

 On track
  At risk
  Extension
  Follow-Up Cody
  Completed

Notes for this goal (optional)

clicked completed after having extension, check if extension note is s

Enter or Update Your Goals

For Mid-cycle or End-of-month Updates: Goals are pre-filled and locked.

Click the Edit button  on a specific goal if you need to correct the text.

You can also update the notes section at the bottom of each goal.

STEP 6

GOAL 1

 On track
  At risk
  Extension
  Follow-Up Cody
  Completed

Set a Status for Each Goal

Every goal must have a status.

Click the appropriate button:

- On Track: Progressing as planned
- At Risk: Falling behind, may need support
- Extension: Need more time (reason required)
- Follow-Up Cody: Complete but needs Cody's review
- Completed: Goal is fully done.

STEP 7

GOAL 1

 On track
  At risk
  Extension
  Follow-Up Cody
  Completed

Notes for this goal (optional)

Progress update, blockers, or context...

Add Notes per Goal (Optional)

Use the notes field under each goal to provide progress updates, blockers, or context for leadership. This is optional but highly recommended.

STEP 8**ADDITIONAL NOTES**

Blockers, support needed, or context for leadership (optional)

Anything leadership should know? Resources you need? Obstacles you're navigating?

Timestamped & logged to Google Sheets automatically

Refresh

Submit goals

Add General Notes (Optional)

Use the Additional Notes section at the bottom for anything that applies across all goals: resources needed, overall blockers, or context for leadership.

STEP 9**ADDITIONAL NOTES**

Blockers, support needed, or context for leadership (optional)

Anything leadership should know? Resources you need? Obstacles you're navigating?

Timestamped & logged to Google Sheets automatically

Refresh

Submit goals

Submit

Click the Submit Goals button.

The form will validate all required fields.

A green banner will appear confirming success.

The page will refresh automatically after 3 seconds.

4. SUBMISSION TYPE RULES & PREREQUISITES**Correct Submission Order per Period:**

1	2	3
New Goals (month start)	Mid-Cycle Update	End-of-Month Review

The form will block submission and show a warning if the prerequisite is not met.

YOUR INFO

Full name
David Makharadze

Department
Corporate

Submission type
End-of-month review

Goal period
August 27, 2026

Today's date
08/28/2026

⚠ You must submit a Mid-cycle update for this period before adding an end-of-month review.

Submission Type	Prerequisite	When to Use
New Goals (month start)	Previous period must have an End-of-month review (except for the very first period)	Beginning of a new goal period. First submission of the cycle.
Mid-cycle Update	New Goals (month start) must exist for this period	Midway through the period. Progress check-in.
End-of-month Review	Mid-cycle update must exist for this period	At the end of the period. Final status update before closing.

5. STATUS GUIDE

Each goal requires a status. Set the status honestly, **At Risk and Extension are not negative**. They help leadership understand where you need support.

Status	Meaning	Notes
On Track	Goal is progressing as planned.	Default status. Use when everything is on schedule.
At Risk	Falling behind. May need support.	Use when you are behind schedule but have not yet missed the deadline.
Extension	Need more time. Deadline needs to move.	A reason and new target date are REQUIRED . Goal carries over to next period.
Follow-Up Cody	Complete but needs Cody's review before closing.	Automatically logged to the "For Cody" tab. Treated as not completed — will carry over.
Completed	Goal is fully done.	Goal will NOT carry over to the next period.

6. GOAL CARRY-OVER RULES

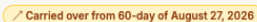
When you submit an End-of-month review, the system **automatically** carries over unfinished goals to the next period. Here are the rules.

Current Tier	Status	What Happens Next Period
30-Day Goal	Not Completed (On Track, At Risk, Extension, or Follow-Up Cody)	Moves to next period's 30-Day slot
60-Day Goal	Not Completed	Moves to next period's 30-Day slot
90-Day Goal	Not Completed	Moves to next period's 60-Day slot
30/60/90-Day Goal	Completed	Not carried over — it's done

Carried-over goals show a yellow **"Carried over from [tier] of [period]"** tag when you add a new submission for the new goal period so you know where they came from. Status resets to On Track when carried over.

Type: Carry-over from August 27, 2026

30-DAY GOAL

60-day due oct 29  

60-DAY GOAL

90-day due nov 11  

The yellow tag will be removed once you add goals for the new period but will keep the text saying it is carried over unless manually deleted.

Type: New goals (month start)

30-DAY GOAL

60-day due oct 29  

60-DAY GOAL

90-day due nov 11  

7. IMPORTANT NOTES TO REMEMBER

Goal Period = Start Date	The goal period dropdown shows the START date of the cycle, not the due date. Due dates are calculated as the next three goal periods after the start date.
One Goal Per Field	Enter only one goal per field. Use the “+ Add Goal” button to add more. Do not combine multiple goals into one field. <i>You can only add goals if the submission type is New goals (month start)</i>
Goals are Pre-Filled on Updates	When you select your name and a period for a mid-cycle or end-of-month submission, your goals from the previous submission will load automatically. You only need to update the status and notes.
Extension Requires a Reason	If you select Extension status, you must provide a reason and a new target date. The form will not allow submission without it.
Follow-Up Cody is Not Complete	Selecting “Follow-Up Cody” means the goal is functionally complete but needs Cody’s review. It will carry over to the next period and be logged to the For Cody tab.
Carry-Over Only on End-of-Month	Goals only carry over automatically when you submit an End-of-month review. New goals and mid-cycle updates do not trigger carry-overs.
You Cannot Skip Steps	You must submit New Goals before Mid-cycle, and Mid-cycle before End-of-month. You also cannot start new goals for a period if the previous period has no End-of-month review.
Page Refreshes After Submit	The form automatically refreshes 3 seconds after a successful submission. This is normal — do not re-submit.
All Submissions are Logged	Every submission is timestamped and saved to Google Sheets instantly. An email notification is sent to David Makharadze after every submission.

8. FOR CODY (FOLLOW-UP TAB GUIDE)

What is the “For Cody” Tab?

The “For Cody” tab in Google Sheets is a dedicated list of goals that require Cody’s review before they can be considered complete. It is automatically populated whenever anyone submits a goal with the “Follow-Up Cody” status.

What Gets Logged to the For Cody Tab?

Column	Description
Submitted At	Date and time the goal was submitted
Name	Who submitted the goal
Department	Their department
Goal Period	Which cycle this goal belongs to
Tier	Whether it was a 30, 60, or 90-day goal
Goal	The full goal description
Extension Reason	If an extension was noted
Notes	Any notes the person added for this goal
Carry-Over From	If the goal was carried over from a previous period
Status	Defaults to “Pending” — Cody updates this column

Cody’s Next Steps After Reviewing an Item

STEP 1	Review the goal Open the “For Cody” tab and review each “Pending” item. Read the goal description, notes, and any extension reason.
STEP 2	Take action Do whatever is needed on your end — approve, follow up with the person, update a system, or complete the related task.
STEP 3	Update the Status column Once you have reviewed and acted on the item, change the Status cell from “Pending” to “Completed”. The row will automatically hide from the view after a few seconds..
STEP 4	Notify if needed If the goal requires the person to do something additional, reach out to them directly. The form does not automatically notify them when you mark it complete.

Important for Cody: Completed rows are automatically hidden from the For Cody tab when you change the Status to “Completed”. The data is still saved, just hidden from view. If you need to see all rows including completed ones, you can unhide them in Google Sheets.

9. QUICK REFERENCE

Item	Detail
Form URL	https://universalawning.netlify.app/
Carry-over trigger	End-of-month review only
For Cody tab	Auto-populated when “Follow-Up Cody” status is used
Questions / Issues	Contact Dave or Hannah directly

Universal Awning & Canopy — Internal Goals Tracker Rulebook