




CRM Monthly Status

“Good management is the art of making problems so interesting and their solutions so constructive that everyone wants to get to work and deal with them.” — Paul Hawken

The Monthly Status report is a synopsis of the month's activities, and highlights any changes or issues at the branch. It is critical for identifying areas that need attention and provides information for monitoring the store's progress.

To access the Monthly Status Report page in the CRM, go to **“Reports”** and then select **“Monthly Status.”**

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Create ▼

Calendar

Reports ▼

Account Search ▼

Search by customer account

Monthly Status Report Calendar 2017

Location:

BEDFORD, MA (47)

Type:



Store


Choose the current Webb month

Month/Year	Status	Action
September 2017	Incomplete	Create
October 2017	Awaiting Approval	View
November 2017	Incomplete	Create
December 2017	Incomplete	Create

[View All Status Reports](#)

General Manager's View of the Monthly Status Report Page:

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Search by customer account #, na

Monthly Status Report Calendar 2017

Location:

METHUEN, MA (83)

Type:

Branch


Choose the current Webb month

Month/Year	Status	Action
September 2017	Incomplete	Create
October 2017	Incomplete	Create Approve 1 Report
November 2017	Incomplete	Create
December 2017	Incomplete	Create

[View All Status Reports](#)

Corporate's View of the Monthly Status Report Page:

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Monthly Status Reports 2017

Choose the current Webb month

Month/Year	Action	# Reports Submitted	# Reports Viewed by You
December 2016	View Month	0	0
January 2017	View Month	0	0
February 2017	View Month	0	0
March 2017	View Month	0	0

Once the “**View Month**” for a specific month is selected, the below page will appear.

Create ▼	Calendar	Reports ▼	Account Search ▼	See
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Monthly Status Reports — October 2017

Branch Reports

Branch	Action	Viewed by You
83 - METHUEN	View Report	

 [Print Branch Reports](#) | 39 Branches have not submitted. [View](#)

Showroom Reports

Branch	Action	Viewed by You
48 - GLOUCESTER	View Report	

 [Print Showroom Reports](#) | 40 Showrooms have not submitted. [View](#)

Store Reports

Branch	Action	Viewed by You
47 - BEDFORD	View Report	

 [Print Store Reports](#) | 96 Stores have not submitted. [View](#)

How to Add a Monthly Status:

1. From the Monthly Status Report page, click on the **“Create”** button corresponding to the specific month for the Monthly Status being worked on.
2. The page will display numerous tables and charts with Sales, GP \$ and GP% information.
3. Under the **“Upcoming Month (Month Year)”** section, enter the store’s **“Sales”** and **“GP \$”** in the **“Estimated”** column.
4. Scroll down to enter in the **“Summary of the Month”** and **“Competition Activities”** under the current month.
5. Under the next month, enter in the **“Expectations of Coming Month,” “Sales / Marketing Events”** and **“Projects / Initiatives.”**
6. Once finished entering all the pertinent information, click on the **“Submit Report”** button. If you have not finished the report, click on the **“Save and Finish Later”** button to add to the report at a later time.

NOTE: Once the report is submitted, no edits can be made.

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Monthly Status Report Form

Location: BEDFORD, MA (47)

Report Type: Store

Summary of October 2017

Showing profit plan, actual and last year up to October 11 (since month is in progress).

(September 25 - October 11)	Profit Plan	Actual	% Above Plan	Last Year
Sales	\$625,075	\$588,590	-5.8%	\$553,036
GP \$	\$136,266	\$133,841	-1.8%	\$115,127
GP %	21.8%	22.7%	0.9%	20.8%

YTD 2017 (January 1 - October 11)

	Profit Plan	Actual	% Above Plan	Last Year
Sales	\$7,765,075	\$8,017,960	3.3%	\$7,725,177
GP \$	\$1,692,786	\$1,848,811	9.2%	\$1,883,307
GP %	21.8%	23.1%	1.3%	24.4%

Upcoming Month (November 2017)

Enter Sales and GP \$ Estimates in the table below.

	Profit Plan	Estimated	% Above Plan	Last Year
Sales	\$1,155,000	1,200,000	3.9%	\$877,463
GP \$	\$251,790	300,000	19.1%	\$199,814
GP %	21.8%	25.0%	3.2%	22.8%

Charts

Year Cumulative

Monthly

Cumulative Difference

Store (BEDFORD, MA) Year Cumulative

[Customize Chart](#)

Open Orders (As of October 11)

\$ 711,200

Open Bids (Last 3 Months) (As of October 11)

\$ 2,652,228

October 2017

Summary of Month

exceeded our sales from last year and on track to double our budgeted sales

Competition Activities

Home Depot is doing a coffee with a cop day
Bidding war with Granite Group

November 2017

Expectations of Coming Month

a few contractors have big jobs that we are hopeful of winning

Sales / Marketing Events

Coffee with Cop Day
Spiderman counter day

Projects / Initiatives

working on new displays for HVAC

Submit Report

Save and Finish Later

How the GMs Approve/Reject a Monthly Status Report:

1. An email will be sent for any report that has been submitted for approval.
2. From the Monthly Status Report page, click on the red **"Approve X Reports"** button and a listing of the reports waiting from approval will appear.
3. Click on the **"View"** button to access the desired report.

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Monthly Status Report — Awaiting Approval for Branch 83

Location	Report Type	Action
48 - GLOUCESTER	Showroom	View
8 - LOWELL	Store	View
31 - HAVERHILL	Store	View

- From the drop-down “**Set Approval Status,**” select either “**Approve**” or “**Reject.**” An email will be automatically sent to the creator of the report letting them know if the report was approved or rejected.


This screenshot shows the 'Set Approval Status' form. A dropdown menu is open, showing 'Approve' and 'Reject' options. The 'Approve' option is highlighted. To the right of the dropdown is a blue button labeled 'Submit Approval Status'.

- When rejecting a report, a comment can be entered to explain why the report is being rejected. This comment will be included in the email sent to the report creator.

This screenshot shows the 'Set Approval Status' form with 'Reject' selected in the dropdown. Below the dropdown is a text input field containing the comment 'Need more details on Projects'. A blue button labeled 'Submit Approval Status' is at the bottom.

How to Add Comments to the Monthly Status Reports:

- From the Monthly Status Report page, click on the “**View All Status Reports**” button located at the bottom of the screen.
- A list of months will appear. Click on the “**View Month**” button for the desired month.

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Monthly Status Reports 2017

Choose the current Webb month

Month/Year	Action	# Reports Submitted	# Reports Viewed by You
December 2016	View Month	0	0
January 2017	View Month	0	0
February 2017	View Month	0	0
March 2017	View Month	0	0

- Click on the “**View Report**” button for the desired report.

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Monthly Status Reports — October 2017

Branch Reports

Branch	Action	Viewed by You
None		

Showroom Reports

Branch	Action	Viewed by You
48 - GLOUCESTER	<div>View Report</div>	

 [Print Showroom Reports](#) | 40 Showrooms have not submitted. [View](#)

Store Reports

Branch	Action	Viewed by You
47 - BEDFORD	<div>View Report</div>	

 [Print Store Reports](#) | 96 Stores have not submitted. [View](#)

4. Enter the comment at the bottom of the screen. An email will go to creator of the report and anyone that is added in the “**Email Recipients**” field.
5. Once the comment is entered, click on the “**Post Comment**” button. The comment will be time and date stamped along with the person’s name that entered the comment.

Viewed By

Graham Cook	10/12/2017
Jeff Pope	10/12/2017

Comments

Your Comment

great job, keep up the good work!

Email Recipients (optional)

Type Recipient Name

+

Graham Cook - graham.cook

Remove

Post Comment

(Comments will appear on this screen.)