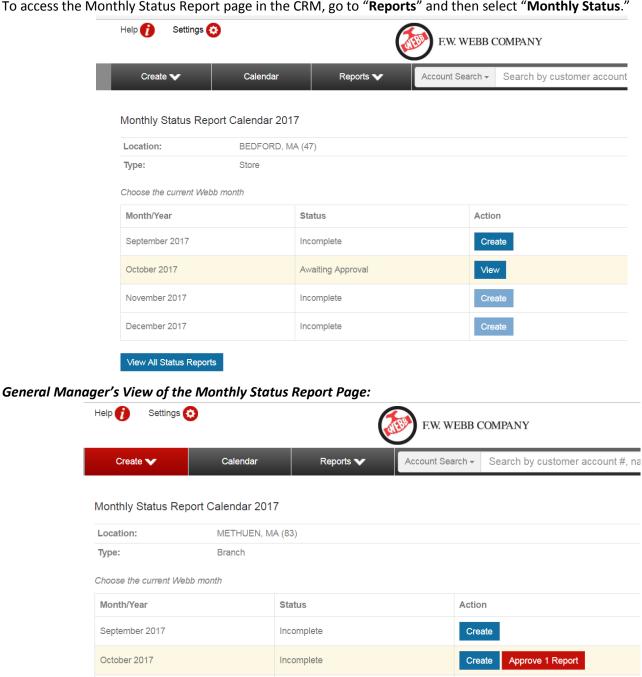
CRM Monthly Status

"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."



Incomplete

Incomplete

November 2017

December 2017

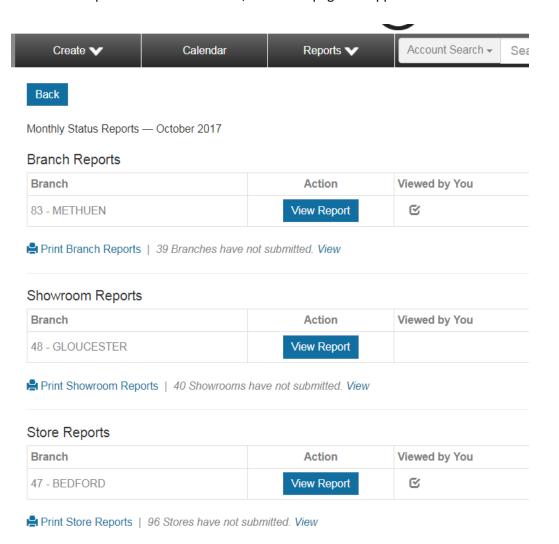
View All Status Reports

Page 1

Corporate's View of the Monthly Status Report Page:



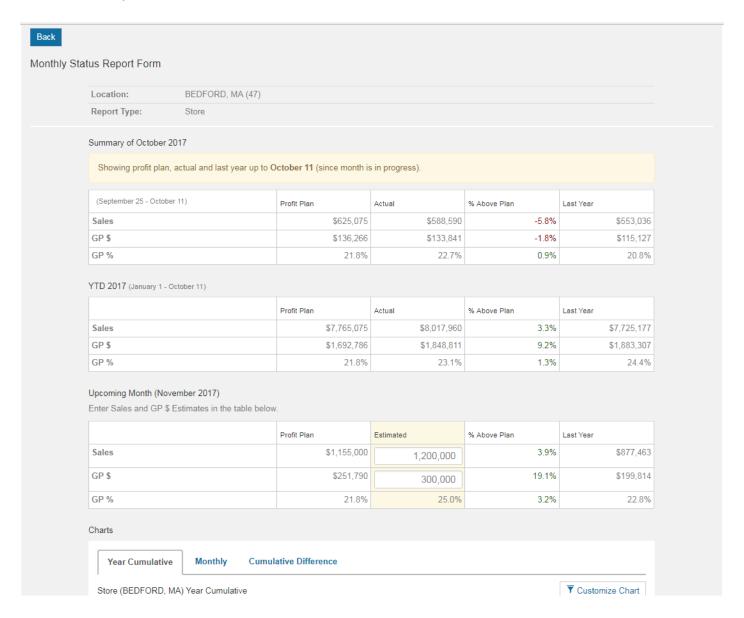
Once the "View Month" for a specific month is selected, the below page will appear.

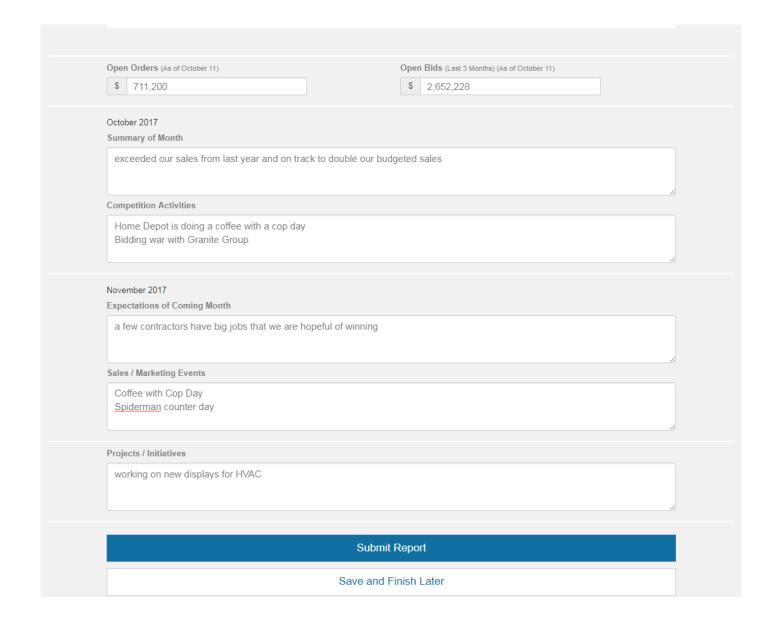


How to Add a Monthly Status:

- 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.

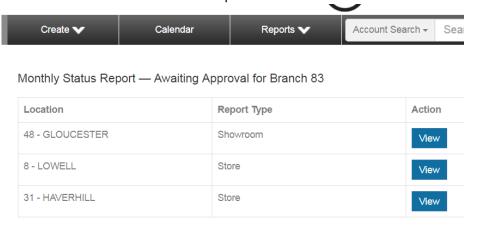
NOTE: Once the report is submitted, no edits can be made.



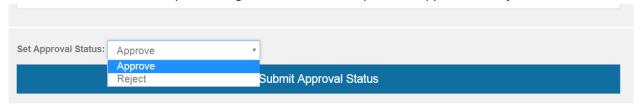


How the GMs Approve/Reject a Monthly Status Report:

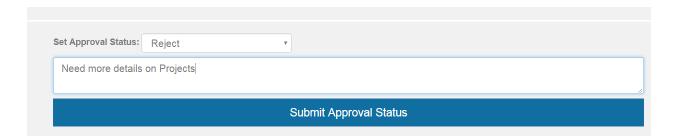
- 1. An email will be sent for any report that has been submitted for approval.
- 2. From the Monthly Status Report page, click on the red "Approve X Reports" button and a listing of the reports waiting from approval will appear.
- 3. Click on the "View" button to access the desired report.



4. 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.



5. 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.



How to Add Comments to the Monthly Status Reports:

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

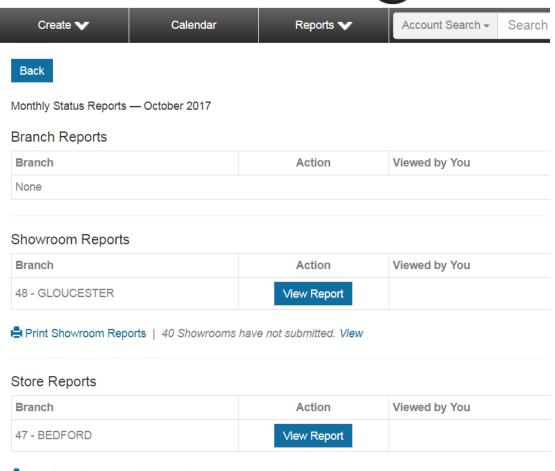


Monthly Status Reports 2017

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

3. Click on the "View Report" button for the desired report.



- 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.

