



Created On: 1-10-23

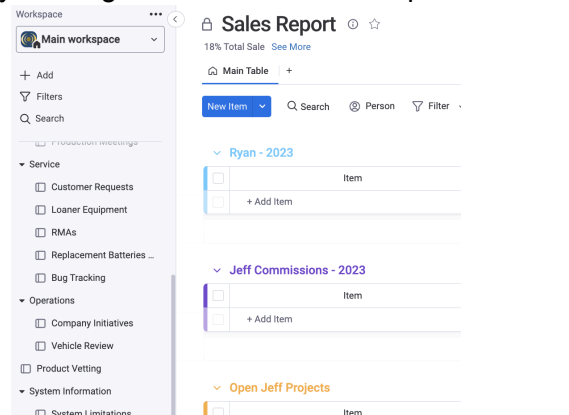
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Update Monday.com Sales Report

At the Beginning of the New Year, it is important to update some of the Automation's in Monday.com to track Sales for the new Calendar Year.

Step 1: Go to Monday.com Sales Report Board

Step 2: Create New Item - By clicking New Item - New Group of Items



Step 3: Label New Group Jeff Commissions - 2023(current year)

Step 4: Repeat for however many Sales People we are updating.

Step 5: Click on Automate in the upper Right hand corner

Step 6: Change the Location to where the Item will move to new Group.

When Status Changes to Done and only if Person is Assigned to Jeff Rodgers move item to Jeff Commissions - 2023

Step 7: Repeat for any additional Sales People.

Step 8: Reorder so that the new created groups fall under Open Jobs.

