

Month-End Reports



Elite Leads Business Development

Month-End Reports

14.1

MONTH-END REPORTS

These reports are designed to help you keep track of your progress, analyze your groups, know what industries are involved or missing. They are all run from the Queries in Access.

A. Month End Report. Income

This report is the analysis of who has paid you and for what groups and trainings.

Click Start Programs

Microsoft Access Elite

"61-Month End Report -1 Income"

Design View, Scroll to the far right

Month Paid: Criteria

Change the information to the current month, for example, January 2003 is "0103"

Datasheet View

File, Print "2" copies

File one copy in your "2003" binder and forward the other copy to the home office.

B. Month End Report. Potential

This group will show you how many guests you have committed to which groups and which groups have need for which industries.

You will also be able to identify a ratio of committed to actual guests who join over a period of time.

Click Start Programs

Microsoft Access Elite

"62-Month End Report -3 Potential"

Open

Fee Due heading to highlight

"W" Analyze it with Excel

Yes, replace original File

"Z" total the field, then enter the figure in Form 30

File, Print "2" copies

File one copy in your "2001" binder and forward the other copy to the home office.

"The merit of originality is not novelty; it is sincerity."
- Thomas Carlyle

Elite Leads Business Development Month-End Reports

14.2

C. Month End Report -Contacts

This report is the analysis of how many people you have contacted for the month

Click Start Programs
 Microsoft Access Elite
 63-Month End Report -3 Contacts
 Design View) Scroll to the far right
 Month Paid: Criteria

Change the information to the current month) for example) January 2003 is "0203"

Datasheet View

File) Print "2" copies

File one copy in your "2003" binder and forward the other copy to the home office

D. Month End Report -Thank You's

This report is the analysis of who has paid you and for what groups and trainings.

Click Start Programs
 Microsoft Access Elite
 65-Month End Report -4-Thank You's
 Design View) Scroll to the far right
 Month Paid: Criteria

Change the information to the current month) for example) January 2003 is "0203"

Datasheet View

File) Print "2" copies

File one copy in your "2003" binder and forward the other copy to the home office.

Send Thank you cards to everyone who referred a guest to the groups and a special Thank you gift to those who sent guests who joined.

Thank you gifts might be an Elite Leads engraved pen) lunch certificate or other type of gift certificate.

"It does not take much strength to do things, but it requires great strength to decide on what to do."

- Elbert Hubbard

Elite Leads Business Development

Month-End Reports

14.3

E. Month End Report -New Members

This report is the analysis of who has paid you and for what groups and trainings.

- Click Start Programs
- Microsoft Access Elite
- 66-Month End Report -5 New Members
- Design View, Scroll to the far right
- Month Paid: Criteria

Change the information to the current month, for example, January 2003 is "0103"

- Datasheet View
- File, Print "2" copies

File one copy in your "2003" binder and forward the other copy to the home office.

- Entire sheet to highlight
- "W" Analyze it with Excel
- Yes, replace original File
- File
- Save As New Member, Yes to replace original file
- Close

- Click Start Programs
- Microsoft Outlook Express to get on-line
- New Mail, Blank, Home Office
- Attach, Look In, Windows, ..f Personal
- "66-Month End Report -5 New Members"
- Send

This must be received by the home office no later than the third Friday of each month in order to be included in the newsletter.

F. Month End Report -Leads

This report is the analysis of who has paid you and for what groups and trainings.

- Click Start Programs
- Microsoft Excel File, ..f Open
- "formE3-Month End Report -LEADS.xls"

"Every human mind is a great slumbering power until awakened by a keen desire and by definite resolution to do."

- Edgar F. Robertsi

Elite Leads Business Development Month-End Reports

14.4

Enter the number of leads from each of your groups.

- File
- Save
- Close
- Click Start Programs
- Microsoft Outlook Express to get on-line
- New Mail Blank Home Office
- Attach Look In Windows Personal
- "formE3-Month End Report -LEADS.xls"
- Send

This must be received by the home office no later than the third Friday of each month in order to be included in the newsletter.

G. Roster -Leads Group by Industry

This report is the analysis of who is in each group.

- Click Start Programs
- Microsoft Access [3] Elite
- 55-Industry List by Group
- Open
- File, Print "I" copy

Use this list for creating leads at the meetings

H. Roster -Leads Group by Group

This report is the analysis of who is in each group.

- Click Start Programs
- Microsoft Access Elite
- 55-List by Group
- Open
- File [3] Print "I" copy

Use this list for creating leads at the meetings

I. Phonebook

This list becomes a compilation of all who have ever been members of Elite Leads, and other resources you discover.

"Our dignity is not in what we do, but what we understand."
- George Santayana

Elite Leads Business Development Month-End Reports

14.5

Click Start Programs
 Microsoft Access Elite
 73-Phonebook
 Open
 A to Z on the Industry Column
 File Print" 1" copy

Design View, Scroll to the right
 Last Name Field Ascending
 Datasheet View
 A to Z on the Last Name
 File Print "1" copy

Use this list for creating leads at the meetings

J. Month End Report -Expenses

This report is the analysis of all of your expenses.

Click Start Programs
 Microsoft Excel File, Open
"form E4-Month End Report-Expenses.xls"

Enter the actual detail of expenses in each column, then transfer the total to Sheet A for your year total.

K. Month End Report -Analysis

This report is the analysis of who has paid you and for what groups and trainings.

Click Start Programs
 Microsoft Excel File, Open
"form E2-Month End -Analysis.xls"

In the " Guest" Column enter the number of guest from the "29-Month End Report -3 Potential" detail.

Enter the Potential Income from the "29-Month End Report -3 Potential" detail for the upcoming month.

Enter the Actual Income from the "28-Month End Report -1 Income" detail for the current month.

*"He who labors diligently
need never despair; for all
things are accomplished by
diligence and labor."*

- Meander of Athens

Elite Leads Business Development
Month-End Reports

14.6

Enter total Expenses from the Excel "form E4-Month
End Report-Expenses.xls" detail.

The form is designed to automatically calculate the
Profit/Loss.

*"To be in good moral condi-
tion requires at least as much
training as to be in good
physical condition."*

- Jawaharlal Nehru
