

Updating Bonus Tracker

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Overview of SOP- This SOP will demonstrate how to locate updated sales numbers for sales reps in order to update The Bonus Tracker spreadsheet.

Resources - Programs Needed

Cypress Sales & Bonus Tracker

https://docs.google.com/spreadsheets/d/1DhOb2JG_v3i0GGLHYPaoE8zb_ViqYYocAHd-hO5iQvw/edit#gid=1115944691

Maghub

<https://id.maghub.com/login/>

Username: membership@crittendenresearch.com

Password: Crittenden123\$

Quick Guide:

- 1.) Run Consolidated Sales Report
- 2.) Fill in fields with necessary information
- 3.) Run for Each Rep
- 4.) Use Cash total
- 5.) Update in Bonus Tracker under "Goals being currently worked"

Detailed Guide

- 1.) Open bonus tracker google sheet. Named ["Cypress Sales and Bonus Tracker"](#). Make sure it has been shared with you and that you have edit access. If you do not have edit access, email Blake.
- 2.) Open up AdOrbit and log in. On the menu options on the left hand side, select
Reports → AI Reports → Sales → Consolidated Sales Report
- 3.) Double click to open the report. Then Fill in required fields. Choose the **publication**, **Issue**, and **Sales rep**. Change probability to **90%** Click "Get Report".

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Gross	Cash	Split Net 	Barter		
\$3,500.00	\$3,500.00	3,500.00	\$0.00		
\$3,500.00	\$3,500.00	3,500.00	\$0.00		
\$5,000.00	\$5,000.00	5,000.00	\$0.00		
\$2,450.00	\$2,100.00	2,100.00	\$0.00		
\$5,000.00	\$5,000.00	5,000.00	\$0.00		
\$3,500.00	\$2,800.00	2,800.00	\$0.00		
\$1,075.00	\$975.00	975.00	\$0.00		
\$5,000.00	\$3,500.00	3,500.00	\$0.00		
\$3,150.00	\$2,835.00	2,835.00	\$0.00		
\$4,500.00	\$1,000.00	1,000.00	\$0.00		
\$5,000.00	\$5,000.00	5,000.00	\$0.00		
\$3,500.00	\$3,500.00	3,500.00	\$0.00		
\$2,800.00	\$2,083.00	2,083.00	\$0.00		
\$1,075.00	\$1,075.00	1,075.00	\$0.00		
\$1,075.00	\$1,075.00	1,075.00	\$0.00		
\$3,500.00	\$3,500.00	3,500.00	\$0.00		
\$3,500.00	\$3,500.00	3,500.00	\$0.00		
\$57,125.00	\$49,943.00	\$49,943.00	\$0.00		
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4.) For each rep on each issue, you will run the report. To get their current sales number, you'll use the "cash" column as highlighted in the screen grab above.

5.) You will then input the current number for each rep. It will look like this:

Crittenden Partners Annual Look				
Deadline	Bonus	Current	Goal	
	Fall PL Mike A		\$42,500	
	Fall PL Mike B	\$51,445	\$50,000	
	Fall PL Mike C		\$53,000	
	Fall PL Mindy A		\$56,000	
	Fall PL Mindy B		\$62,500	
	Fall PL Mindy C	\$71,487	\$71,000	
	Fall PL Kyle A		\$10,600	
	Fall PL Kyle B		\$12,500	
	Fall PL Kyle C	\$18,278	\$14,375	

6.) Update this every week before the Sales Meeting so the reps can see where they are at.

7.) Once an issue has closed, you can remove the issue from the “current goals being worked” and place them in the old goals tab. This is simply cutting from current, and pasting into “Old Goals” section.

B2S NJ Goal Mike C		\$23,000		\$900.00	
B2S NJ Goal Mindy A		\$17,000		\$450	
B2S NJ Goal Mindy B		\$20,000		\$450	
B2S NJ Goal Mindy C	\$27,102	\$23,000		\$900	
B2S NJ Kyle goal A	\$6,661	\$8,500		\$230	
B2S NJ Kyle goal B		\$10,000		\$230	
B2S NJ Kyle goal c		\$11,500		\$460	
Zac August A		\$12,000		\$500	
Zac B		\$16,000		\$500	
Zac C		\$20,000		\$500	
Zac D		\$24,000		\$500	

+ ≡ current Goals being worked ▾ legal ed ▾ Golf ▾ Crittenden ▾ Medical ▾ Subs ▾ Old Goals ▾ EXPIRED ▾