

****Basic Reports to Run****

Scheduled Premier:

- Log into connect > Client Support > projected Optavia Premier
- Upper right corner – choose Frontline or organization (you can then sort by coach, process date, etc)

Cancelled Premier:

- Log into connect > Client Support > canceled Premier Report
- Upper right corner – choose Frontline or organization (you can then sort by coach, process date, etc)

Client Report (Active & Inactive) this is how you can run your 180 day inactives:

- [Click here for instructions on running client report](#)

of New Clients (frontline & team):

- Log into connect. Look under team activities on right side of Home Screen

of New Coaches (frontline & team):

- Log into connect. Look under team activities on right side of Home Screen

of New SC's & ED's (frontline & team):

- Log into connect > Engage > Team Rank > Currently performing above highest achieved rank

Consistency Bonus:

- Go to your individual coach's profile (either from the search button or from tree view). Go to "view full profile" choose "volume" from the dropdown menu. Look for the first month they hit 2000 FQV

How To figure out your previous month's total income:

- Log into connect > Engage > Your performance
- Click on "Monthly Bonus" & select the month you want to calculate income for. Write down your total monthly bonus
- Take 15% of last month's FQV
- Add that together with your "monthly Bonus"
- (if you earned a CAB or CAB assist, be sure to add that on top too!)

