

How to do the Monthly Report

1. Log in to Gmail
2. Open sales representative's gmail (ask for access from sales rep)
3. Open Monthly Report template/spreadsheet
4. Open Google Drive
5. Open Weekly Monthly Contact spreadsheet
6. Open Follow Up Spreadsheet/s from Google Drive
7. Sort spreadsheet/s by referral contact's last name (Sort A to Z)
8. Copy all patients under first referral contact
9. Change Monthly Report Template/ Spreadsheet File Name following this format:
(Referral's First and Last name) - Previous Month _ Current Year
ex. John Doe – December 2015
10. Open Monthly Report Template/ Spreadsheet
11. Paste all patients on Monthly report template/spreadsheet
12. Change spreadsheet's title following this format:
(Referral's First and Last name) - Previous Month _ Current Year
ex. John Doe – December 2015
13. Delete the columns containing referral contact's first and last name
14. Delete all EXCEPT APPROVED patients
15. Edit notes (delete unnecessary notes)
16. Save file
17. Go back to sale representative's gmail
18. Compose a simple e-mail:
 - a. Enter referral contact's email address
 - b. Follow this format for the subject line:
(Previous Month and Current Year - Report) Monthly Patients on Service with
(Name of Pharmacy)
ex. (December 2015 - Report) Monthly Patients on Service with Dummy Pharmacy

c. Sample message

Hi John,

Hope you are doing well.

Here is the monthly report containing a list of your approved and active patients receiving nutritional supplements as of end of December 2015.

Please see attached.

Please feel free to call or email us if you have any questions or if you need anything.

Thank you for allowing us to service you and your patients.

Sincerely,

-sales rep's email signature-

d. Blind Carbon Copy (BCC) – sales representative's email

e. Label the email under the referral contact's name

19. Hit Send.

20. Delete the message from Inbox only (make sure that a copy of the email is in the referral contact's label)