

The Memo Report (Weekly & Monthly)

Basic Instructions

1. Ask accounting for a blank copy of the memo report.
2. Every Monday, fill it out, either with a pen, or digitally on a computer.
3. Email it to accounting.
4. After the last day of the month, make a month-end report.

This memo helps to keep track of all the sales contracts / addresses. **Each week on Monday (or Tuesday morning if necessary)**, fill out the two memos and send to accounting via email. **At the end of the month**, make a “month-end” report.

There are actually TWO memos, but they are referred to as “the memo”. The first is for counting stats, and the second is for listing addresses / contracts.

Report everything in a **cumulative** total. So if there were 2 sales in the previous report, and 2 more sales this week, then the next report will have 4 sales. Reset for the next month.

Detailed Instructions

How to update the memo digitally

The memo is easier to update digitally, not so much with a pen and paper.

1. Open each document.

a. Either it will open in an app called Microsoft Word or WordPad. Both work. If you encounter trouble, call Mick for IT support.

2. Update each section.

3. Save the changes.

a. Be sure it is saved with a name and placed in a dedicated folder for Memos – this is good organization practice.

b. To rename a file, right-click it and choose the ‘rename’ option.

4. Email both memos to accounting and Steve also.

Alternative method: printing and pen

1. Print both documents (Memo and “Memo Specifics”)

2. Fill it out or update it.

3. Scan it on the printer. Use your email address.

4. The printer will send you an email. **Find that email.**

5. In that email, **download the file** to a dedicated folder for Memos. and rename it.

One way to rename is to right-click the file and choose “rename” from the list of options.

6. Email both memos to accounting and Steve also.

Examples

Zebulon's Memos (July 17)

MEMO

TO: Corp Accounting

FROM: **Zebulon Office**

DATE: This report is a **cumulative** total from the 1st of **July** through Monday, **17th @ 2:00 p.m.**

Please be advised that our office has the following total as of this morning taken from this month's listing and sales sheets posted in the office.

Residential Listings	2
Residential Sales Units	3
Recruiting Interviews	1
New Hire(s)	0

MEMO

SPECIFICS

TO: Corp Accounting

FROM: **Zebulon Office**

DATE: This report is a **cumulative** total from the 1st of **July** through Monday, **17th @ 2:00 p.m.**

These are specific properties whose contracts are mentioned in the Memo Report.

Listings
1439 Pine Dr, Griffin
603 Buster Brown Rd, Jackson

Sales
117 Windrow Trl
703 Nottingham St
1439 Pine Dr, Griffin

Zebulon's Month-End Report

MEMO

TO: Corp Accounting

FROM: **Zebulon Office**

DATE: This report is a **cumulative** total from the 1st of **July** through **the end of the month.**

Please be advised that our office has the following total as of this morning taken from this month's listing and sales sheets posted in the office.

Residential Listings	3
Residential Sales Units	4
Recruiting Interviews	1
New Hire(s)	1

MEMO

SPECIFICS

TO: Corp Accounting

FROM: **Zebulon Office**

DATE: This report is a **cumulative** total from the 1st of **July** through **the end of the month.**

These are specific properties whose contracts are mentioned in the Memo Report.

Listings
1439 Pine Dr, Griffin
603 Buster Brown Rd, Jackson
1131 Patton Way, McDonough

Sales
117 Windrow Trl
703 Nottingham St
1439 Pine Dr, Griffin
344 S Main St