

Executive Summary

I created a VBA project for Homestar Windows. This company is owned and operated by my father, Dave Orgill. It specializes in vinyl replacement windows and doors. The business has 12 employees including three secretaries, six salesmen, and 2 installation crews. Homestar Windows advertises through a diverse range of mediums including Home Improvement magazines and newsletter subscriptions, Google Adwords, the radio, Angie's List, Yelp, and Facebook. Homestar diligently tracks how new customers heard about it. It also employs the use of CallSource.com. This company produces 20 different phone numbers that Homestar utilizes. A different phone number is used on each advertising medium. When someone calls in, callsource.com recognizes the phone number and matches it to an advertising source. That way, Homestar knows where people are learning about its products.

My projects simplifies and automates the lead tracking process for Homestar's lead secretary. It allows the user to input new lead information, produces executive level lead information, and brings in comparative data from callsource.com.

Project Scope

My project's workbook consists of 13 worksheets. The first worksheet, labeled "Info" contains the master lists for the rest of the workbook. The other 12 worksheets contain templates for a corresponding month of the current year. This is where the secretary

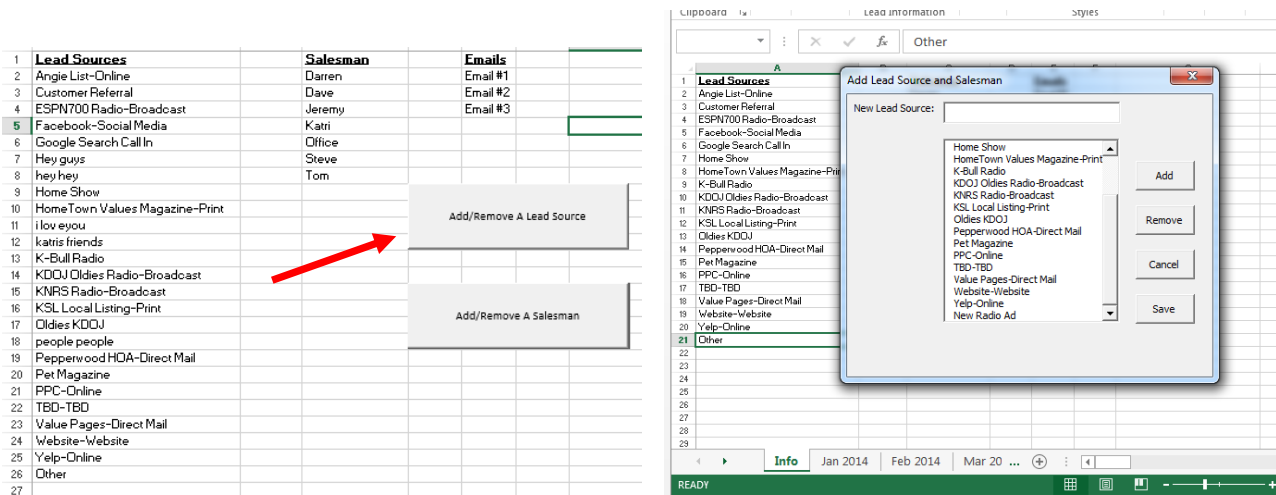
	A	B	C	D	E	F	G	H
1	Lead Sources		Salesman		Emails			
2	Angie List-Online		Darren		Email #1			
3	Customer Referral		Dave		Email #2			
4	ESPN700 Radio-Broadcast		Jeremy		Email #3			
5	Facebook-Social Media		Katri					
6	Google Search Call In		Office					
7	Hey guys		Steve					
8	hey hey		Tom					
9	Home Show							
10	HomeTown Values Magazine-Print							
11	i lov eyou							
12	katris friends							
13	K-Bull Radio							
14	KDOJ Oldies Radio-Broadcast							
15	KNRS Radio-Broadcast							
16	KSL Local Listing-Print							
17	Oldies KDOJ							
18	people people							
19	Pepperwood HOA-Direct Mail							
20	Pet Magazine							
21	PPC-Online							
22	TBD-TBD							
23	Value Pages-Direct Mail							
24	Website-Website							
25	Yelp-Online							
26	Other							
27								
28								
29								

inputs and updates lead information.

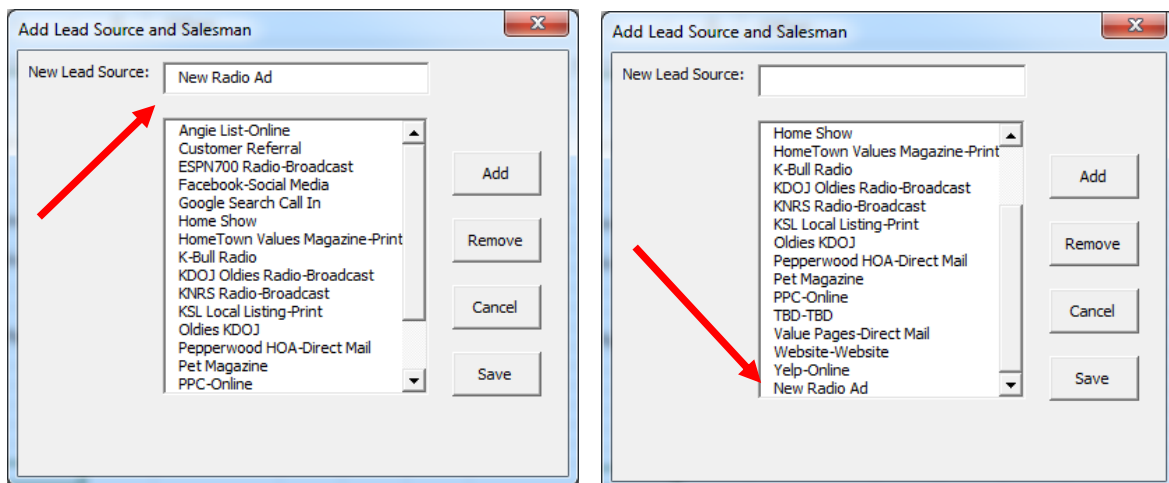
The "Info" worksheet contains three lists—"Lead Sources", "Salesman", and "Emails." The Lead Sources list contains all the different mediums through which Homestar can generate a new lead. This is the

Master list and it is dynamic. Every change that is made to this list will be replicated on (almost) all the worksheets.

Lead Sources on this list are easily added or removed by clicking on the “Add/Remove A Lead Source” button. A user form is generated after clicking on the button.



This form automatically populates a list box with all the lead sources that are currently in the Master List. The user types a new lead source into “New lead Source” text box. After writing a source, the user clicks the “Add” button. This source is then added to the list box. The code prevents a user from adding a blank entry to the list. The user can also select (highlight) a lead source that is currently shown in the list box. They can then click on the “Remove” button. This removes the item from the list box. If the user clicks on “Cancel”, any changes made to the list box will not be saved and the original version of the Master List will still be retained on the “Info” worksheet. After the user has made all the necessary changes he/she can click on the “Save” button. After “Save” is selected, the previous Master List is cleared. The updated Master List is printed column A. However, first the “Other” item is removed from the list. The update list is alphabetized, and then “Other” is added back to the end of the list.



Add Lead Source and Salesman

New Lead Source:

- Home Show
- HomeTown Values Magazine-Print
- K-Bull Radio
- KDOJ Oldies Radio-Broadcast
- KNRS Radio-Broadcast
- KSL Local Listing-Print
- Oldies KDOJ
- Pepperwood HOA-Direct Mail
- Pet Magazine
- PPC-Online
- TBD-TBD
- Value Pages-Direct Mail
- Website-Website
- Yelp-Online
- New Radio Ad**

Add Remove Cancel Save

Add Lead Source and Salesman

New Lead Source:

- Google Search Call In
- Home Show
- HomeTown Values Magazine-Print
- K-Bull Radio
- KDOJ Oldies Radio-Broadcast
- KNRS Radio-Broadcast
- KSL Local Listing-Print
- Oldies KDOJ
- Pepperwood HOA-Direct Mail
- Pet Magazine
- PPC-Online
- TBD-TBD
- Value Pages-Direct Mail
- Website-Website
- Yelp-Online**

Add Remove Cancel Save

Then the Master Lead Sources List is replicated on each of the worksheets that correspond to the month. Almost. The list is actually only replicated onto each worksheet that corresponds to either the current month or a month in the future. For example, if you made a change to the Master list in April, only the lists on Worksheets April 2014-December 2014 would be updated to reflect these changes. On each of these worksheets, extra rows are added if the updated Master Lead Sources List has more items than the original and rows are deleted if the updated Master List has less items than before. Don't worry, rows will only be added/removed at the bottom of the original Master List on each sheet. That way, no data is lost.

	A	B	C	D	E	F	G	H	I
1	4/1/2014	to	4/30/2014						
2	Lead Sources	CallSource Numbers	Salesman	Monthly Referrals	Closed	Closing Ratio	Gross Sales		
3	Angie List-Online	0	Darren		0	0	\$0.00		
4	Customer Referral	0	Dave		0	0	\$0.00		
5	ESPN700 Radio-Broadcast	0	Jeremy		0	0	\$0.00		
6	Facebook-Social Media	0	Karti		0	0	\$0.00		
7	Google Search Call In	0	Office		0	0	\$0.00		
8	Home Show	0	Steve		0	0	\$0.00		
9	HomeTown Values Magazine-Print	0	Tom						
10	K-Bull Radio	0							
11	KDOJ Oldies Radio-Broadcast	0							
12	KNRS Radio-Broadcast	0							
13	KSL Local Listing-Print	0							
14	Oldies KDOJ	0							
15	Pepperwood HOA-Direct Mail	0							
16	Pet Magazine	0							
17	PPC-Online	0							
18	TBD-TBD	0							
19	Value Pages-Direct Mail	0							
20	Website-Website	0							
21	Yelp-Online	0							
22	Other	0							
23									
24	ID	Date	First Name	Last Name	Phone #	Address	City	Zip	Email
25									
26									
27									
28									
29									
30									

Instructions: In order to open the Lead Information Form, double click on a cell that you want to edit or create a new lead. If you accidentally click on a cell outside of the lead information area or edit, press cancel. If you do choose to edit information in the Lead Information form, keep the program to run properly. "Email #1,2,3" must always have 1,2,3 format. The only valid values are a comma after the last number. Lead Source and Salesman Assigned are picked from a dropdown menu. Write anything in this area that is not found in this drop-down box. The only valid entries for "P" "Yes" or "No". Ignore the "ID" column. Do not change the "Referral Sources" column in the

The user can also click on the “Add/Remove A Salesman” button. After clicking on this button, another user form is generated. This user form works in almost the exact same

	A	B	C	D	E	F	G
1	Lead Sources		Salesman		Emails		
2	Angie List-Online		Darren		Email #1		
3	Customer Referral		Dave		Email #2		
4	ESPN700 Radio-Broadcast		Jeremy		Email #3		
5	Facebook-Social Media		Katri				
6	Google Search Call In		Office				
7	Home Show		Steve				
8	Home Town Values Magazine-Print		Tom				
9	K-Bull Radio						
10	KDOJ Oldies Radio-Broadcast						
11	KNRS Radio-Broadcast						
12	KSL Local Listing-Print						
13	Oldies KDOJ						
14	Pepperwood HOA-Direct Mail						
15	Pet Magazine						
16	PPC-Online						
17	TBD-TBD						
18	Value Pages-Direct Mail						
19	Website-Website						
20	Yelp-Online						
21	Other						
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							

way. The user form is populated with the items currently on the Master Salesman List, the user can add or remove items. After being saved, the list is alphabetized, and then the rest of the worksheets corresponding to months are updated accordingly. The only

UserForm1

New Salesman: John

Darren
 Dave
 Jeremy
 Office
 Steve
 Tom

difference with this list is rows are not added or deleted based on changes to this list. The reasoning behind this is based on the assumption that there will never be more Salesman than Lead Sources.

The user can ignore the “Emails” list. This list used later to populate the Lead Information form.

Each of the remaining worksheets that correspond to a month of the year are formatted exactly the same. The upper portion of these sheets contains a copy of the Master Lead Source List, the Salesman List, as well as columns for total leads from each source, the corresponding callsource.com numbers, and columns that tell how many leads each salesman is being assigned, how many he is closing, his closing ratio, and the gross sales that relate to his closed leads. The lower portion of these worksheets is

where the secretary stores all the lead information such as first and last name, phone number, address, the lead source, notes, appointment date, salesman assigned, and amount of sale.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1		3/1/2014	to	3/31/2014																
2	Lead Sources	Lead Sheet Totals	Call/Sales Numbers		Salesman	Monthly Leads	Closed	Closing Ratio	Gross Sales											
3	Angie List-Online	2	10		Darren	19	3	15.79%	\$7,031.00											
4	Customer Referral	4	4		Dave	1	0	0.00%	\$0.00											
5	ESP/700 Radio-Broadcast	0	1		Jeremy	9	2	22.22%	\$4,100.00											
6	Facebook-Social Media	0	0		Katri	0	0	0.00%	\$0.00											
7	Google Search Call In	0	0		Office	0	0	0.00%	\$0.00											
8	Home Show	2	2		Steve	18	4	22.22%	\$5,004.00											
9	HomeTown Values Magazine-Print	0	50		Tom	7	0	0.00%	\$0.00											
10	K-Bull Radio	0	0																	
11	KDOI Oldies Radio-Broadcast	0	7																	
12	KNRS Radio-Broadcast	0	33																	
13	KSL Local Listing-Print	0	26																	
14	KPCQ-Online	0	16																	
15	KDOI Oldies	0	0																	
16	Pepperwood HOA-Direct Mail	0	0																	
17	Pet Magazine	0	0																	
18	TSD-TSD	0	1																	
19	Value Pages-Direct Mail	0	42																	
20	Website-Wabotie	1	0																	
21	Welp-Online	1	0																	
22	Other	0	0																	
23																				
24	ID	Date	First Name	Last Name	Phone #	Address	City	Zip	Email	Lead Source	Lead ID#	Follow Up	Notes	Email #1,2,3	Appointment Date	Salesman Assigned	Phone Quoted Only	Sold Date	Amount	
25		3/3/2014	Richards, Libby							Angie List-Online			Pet Door					3/4/2014	\$ 970.00	
26		3/3/2014	Worthen, Veron							Angie List-Online	12976750422		Not Interested			Dave				
27		3/3/2014	Debanham, Mona							Value Pages	12977530622		2 Basement Windows		3/6/2014	Steve		3/7/2014	\$ 852.00	
28		3/3/2014	Phadnis, Nitin							Value Pages	12979454622		Not Interested							
29		3/3/2014	McBride, Mike							12979454622			Hung up on me							
30		3/3/2014	Middleton, Yvonne							12980283422			Wooden PD, Pet Door							
31		3/3/2014	Rebecca							Home Show			Too much\$55							
32		3/3/2014	Jackson, Victor										Too much\$55							
33		3/3/2014	Ratcliffe, Collette										Too much\$55							
34		3/3/2014	Taylor, Wendy										Not real phone or email							
35		3/3/2014	Whaaler, Jean										Pet Door	1						
36		3/3/2014	Pirainen, Neal										French Door							
37		3/3/2014	Askew, Alyssa										Price on pet door, she c/b							
38		3/3/2014	Luhn										LM							
39		3/3/2014	Erskine, Jordan										LM							
40		3/3/2014	Robinson, Lisa										Pet Door							
41		3/3/2014	Norton, Charles										LM							
42		3/3/2014	Green, Lisa							574962320			LM	1						
43		3/3/2014	Bennett, Ralph							12982089222			5 Broken Windows							
44		3/3/2014	Tommy										French Door talk to his wife.							
45		3/3/2014	Schroeder, Jason										Pet Door							
46		3/3/2014	Fisher, Adam										On Line Quote	1						
47		3/3/2014	Smith, Joann							Value Pages			Pet Door		3/6/2014	Steve		3/6/2014	\$ 1,070.00	
48																				

Jan 2014

Feb 2014

Mar 2014

April 2014

May 2014

June 2014

July 2014

Aug 2014

Sept 2014

Oct 2014

No ...

+

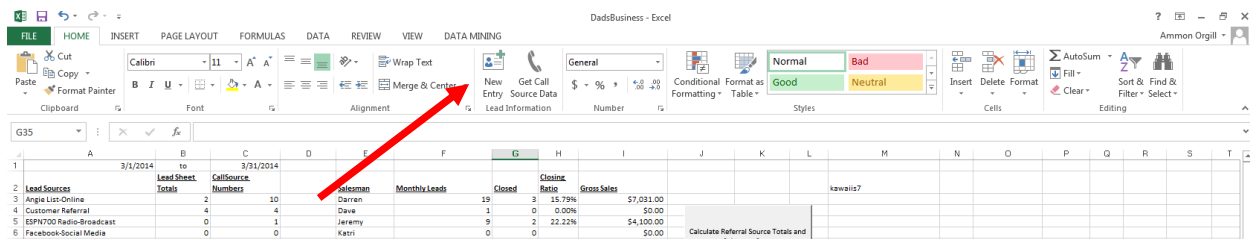
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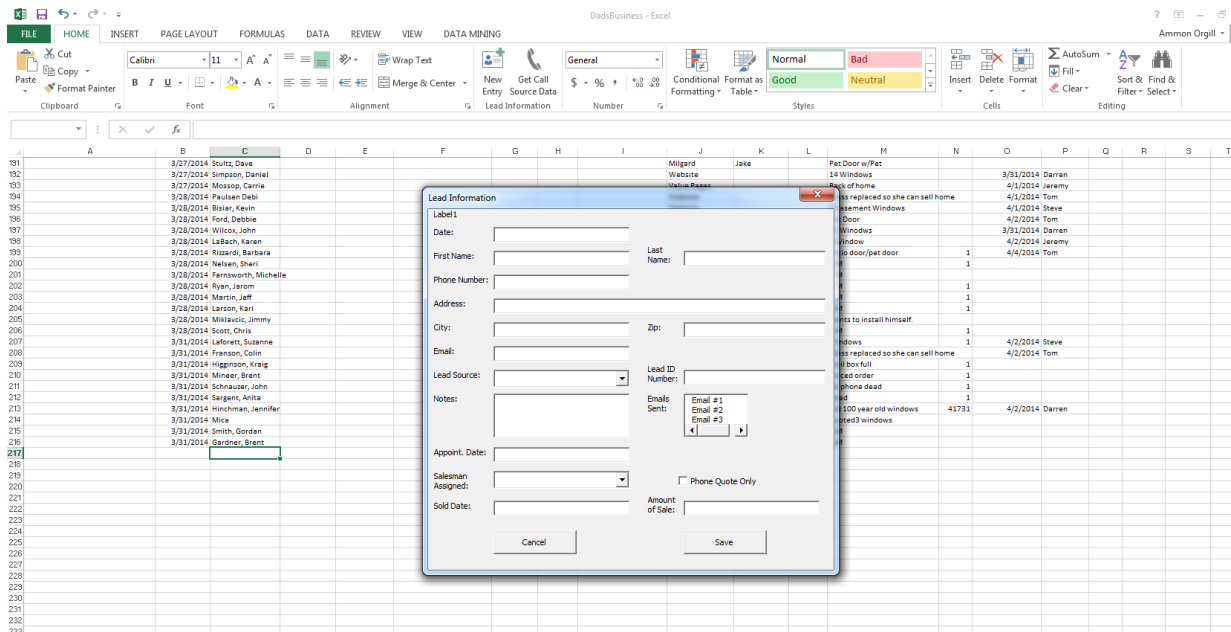
READY

<

This is where the secretary will spend most of his/her time. In the home ribbon, there is a section labeled “Lead Information.” The user can click on “New Entry” to input data for a new lead.



This button runs a macro that automatically takes the selected cell down to the row the first empty row in the Lead Information section. Then another user form is generated. Here, the user can input all the data that corresponds to the new lead.



They can enter all the information into the text boxes.

The image shows the 'Lead Information' dialog box with red arrows pointing to the Date, First Name, and Address fields. The fields are filled with: Date: 4/12/1, First Name: Nathan, Last Name: Dudly, Phone Number: 333-333-3333, Address: 333 Three Street, City: Three, Zip: 33333, Email: three33@gmail.com, Lead Source: (dropdown), Notes: (empty), Appoint. Date: (empty), Salesman Assigned: (dropdown), Sold Date: (empty), Lead ID Number: (empty), Emails Sent: (dropdown with Email #1, Email #2, Email #3), and Amount of Sale: (empty). There are also checkboxes for 'Phone Quote Only' and 'Save' and 'Cancel' buttons at the bottom.

They can select a lead source and salesman from drop down boxes.

The screenshot shows the 'Lead Information' form with the following data:

- Date: 4/12/1
- First Name: Nathan
- Last Name: Dudley
- Phone Number: 333-333-3333
- Address: 333 Three Street
- City: Three
- Zip: 33333
- Email: three33@gmail.com
- Lead Source: Angie List-Online (highlighted with a red arrow)
- Notes: (empty)
- Appoint. Date: (empty)
- Salesman Assigned: Darren
- Sold Date: (empty, highlighted with a red arrow)
- Lead ID Number: (empty)
- Emails Sent: Email #1, Email #2, Email #3
- Phone Quote Only: ☐
- Amount of Sale: (empty)

Buttons: Cancel, Save

They can highlight how many follow up emails have been sent.

The screenshot shows the 'Lead Information' form with the following data:

- Date: 4/12/1
- First Name: Nathan
- Last Name: Dudley
- Phone Number: 333-333-3333
- Address: 333 Three Street
- City: Three
- Zip: 33333
- Email: three33@gmail.com
- Lead Source: Angie List-Online
- Notes: (empty)
- Appoint. Date: (empty)
- Salesman Assigned: Darren
- Sold Date: (empty)
- Lead ID Number: (empty)
- Emails Sent: Email #1, Email #2 (highlighted with a red arrow), Email #3
- Phone Quote Only: ☐
- Amount of Sale: (empty)

Buttons: Cancel, Save

They can also mark if the new lead was a phone quote only.

Lead Information

Label1

Date: 4/12/1

First Name: Nathan

Phone Number: 333-333-3333

Address: 333 Three Street

City: Three

Email: three33@gmail.com

Lead Source: Angie List-Online

Notes:

Appoint. Date:

Salesman Assigned: Darren

Sold Date:

Last Name: Dudly

Zip: 33333

Lead ID Number:

Emails Sent:

Email #1

Email #2

Email #3

☐ Phone Quote Only

Amount of Sale:

Cancel

Save

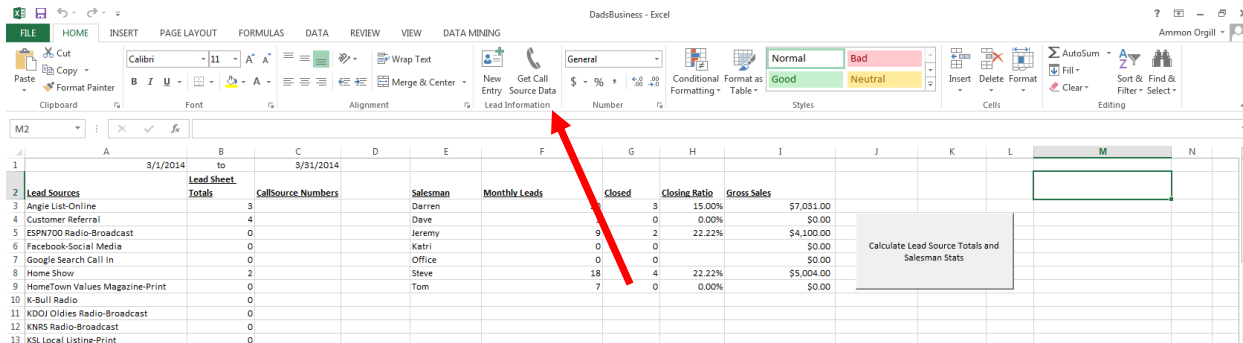
If the “Cancel” button is selected, then the information is not saved. If “Save” is clicked, then the information entered in the user form is saved onto the currently selected worksheet in the row of the active cell and in the correct corresponding columns. If the user wants to edit any information in an individual row, they just need to double click on any cell in the row. This will automatically bring up the Lead Information user form.

As the list fills up, it becomes valuable to see totals of how many leads have come from each lead source. Also, the secretary wants to see how many leads have been assigned to each salesman to guide her in future lead assignments. The owner also wants to see how well the salesman are doing at closing the leads they are assigned. The user can then click on the “Calculate Lead Source Totals and Salesman Stats” button. These numbers will then automatically be generated for each lead source and for each salesman.

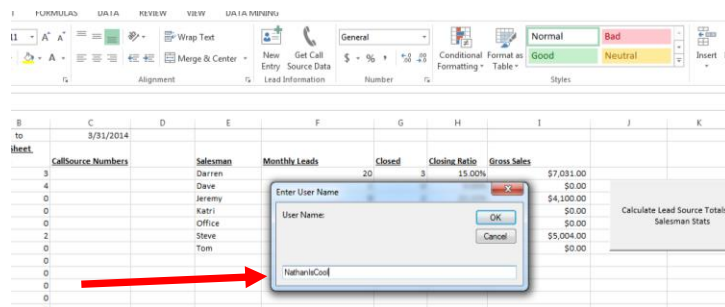
	A	B	C	D	E	F	G	H	I	J	K	L	M
1		3/1/2014	to	3/31/2014									
2	Lead Sources	Lead Sheet Totals	CallSource Numbers	Salesman	Monthly Leads	Closed	Closing Ratio	Gross Sales					
3	Angie List-Online			Darren									
4	Customer Referral			Dave									
5	ESPN700 Radio-Broadcast			Jeremy									
6	Facebook-Social Media			Katri									
7	Google Search Call In			Office									
8	Home Show			Steve									
9	HomeTown Values Magazine-Print			Tom									
10	K-Bull Radio												
11	KDOI Oldies Radio-Broadcast												
12	KNRS Radio-Broadcast												
13	KSL Local Listing-Print												
14	PPC-Online												
15	Oldies KDOI												
16	Pepperwood HOA-Direct Mail												
17	Pet Magazine												
18	TBD-TBD												
19	Value Pages-Direct Mail												
20	Website-Website												
21	Yelp-Online												
22	Other												
23													
24	ID	Date	First Name	Last Name	Phone #	Address	City	Zip	Email	Lead Source	Lead ID#	Follow Up Calls	Notes
25		3/3/2014	Richards, Libby							Angie List-Online			Pet Door

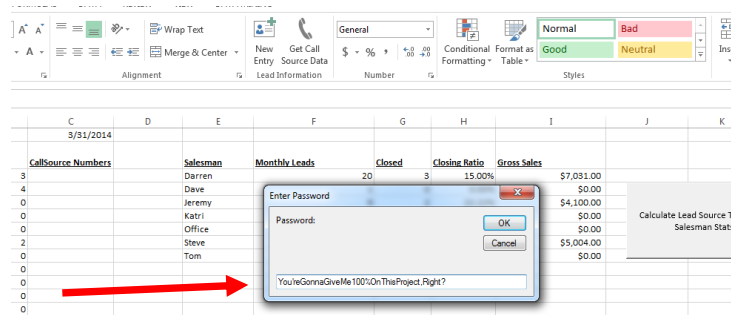
#	A	B	C	D	E	F	G	H	I	J	K	L
1	3/1/2014	to	3/31/2014									
2	Lead Sources	Lead Sheet	CallSource Numbers	Salesman	Monthly Leads	Closed	Closing Ratio	Gross Sales				
3	Angie List-Online	3		Darren	20	3	15.00%	\$7,031.00				
4	Customer Referral	4		Dave	1	0	0.00%	\$0.00				
5	ESPN700 Radio-Broadcast	0		Jeremy	9	2	22.22%	\$4,100.00				
6	Facebook-Social Media	0		Katri	0	0		\$0.00				
7	Google Search Call In	0		Office	0	0		\$0.00				
8	Home Show	2		Steve	18	4	22.22%	\$5,004.00				
9	HomeTown Values Magazine-Print	0		Tom	7	0	0.00%	\$0.00				
10	K-Bull Radio	0										
11	KDOI Oldies Radio-Broadcast	0										
12	KNRS Radio-Broadcast	0										
13	KSL Local Listing-Print	0										
14	PPC-Online	0										
15	Oldies KDOI	0										
16	Pepperwood HOA-Direct Mail	0										
17	Pet Magazine	0										
18	TBD-TBD	0										
19	Value Pages-Direct Mail	0										
20	Website-Website	0										
21	Yelp-Online	1										
22	Other	0										
23												
24	ID	Date	First Name	Last Name	Phone #	Address	City	Zip	Email	Lead Source	Lead Id#	Follow Up
25		3/3/2014	Richards, Libby							Angie List-Online		Pet Door
26		3/3/2014	Worthen, Veron							Angie List-Online	12976750422	Not Interested
27		3/3/2014	Deberham, Mona							12977530522		Not Interested
28		3/3/2014	Phadris, Nitin							Value Pages		3 Basement Win
29		3/3/2014	McBride, Mike							12979454522		Not Interested
30		3/3/2014	Middleton, Yvonne							12980283422		Hung up on me

Finally, the user can compare the data the secretary has recorded in the spreadsheet to the data that callsource.com generates. In the home ribbon under the “Lead Information” section, the user can click on “Get Call Source Data.”

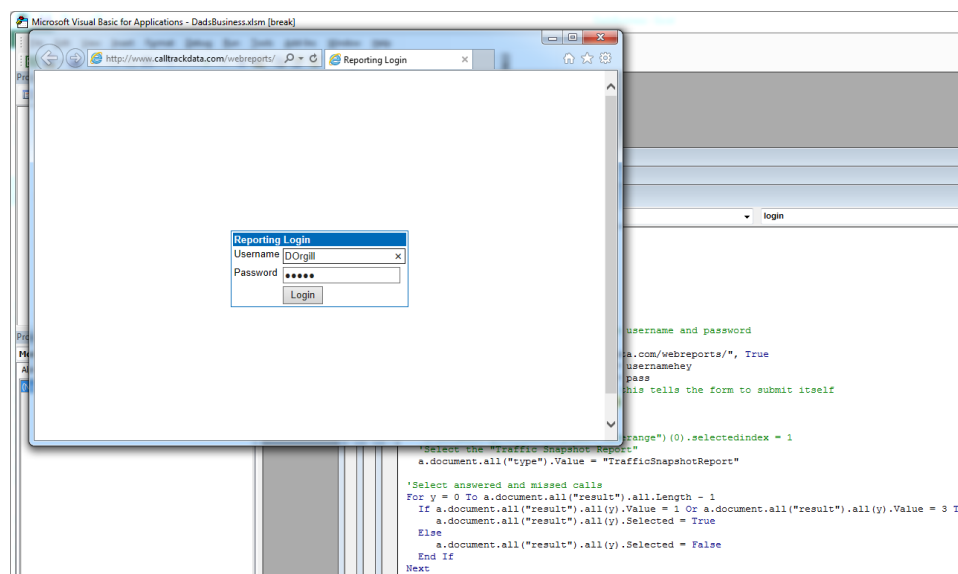


This then brings up two input boxes. These boxes prompt the user to enter the username and password for Callsource.com.

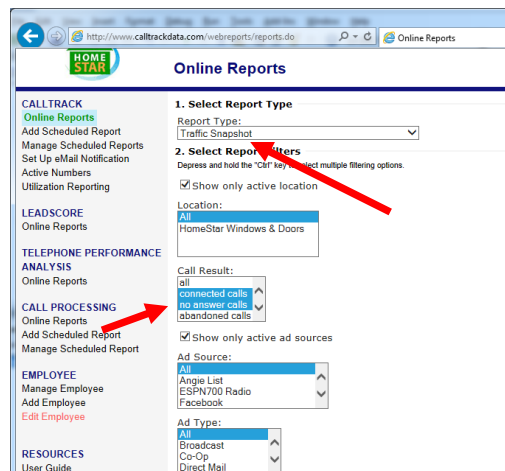




This information is then used to login to callsource.com. Using the agent method, internet explorer brings up callsource.com, enters the credentials and selects the “Login” button.



Then the program selects options from the drop down boxes on this website—“Traffic Snapshot Report”, “Connected Calls” and “No Answer Calls.”



Then, then the correct Date Range is selected based on whatever month the active worksheet corresponds to. For example, if it is April 12 and you are in the “March 2014” worksheet, the program will select “Custom Date Range”, and “Mar 1, 2014-Mar 31, 2014.”

Manage Scheduled Report

EMPLOYEE
 Manage Employee
 Add Employee
 Edit Employee

RESOURCES
 User Guide
 Vanity Availability Search
 Contact Customer Care
 Send eMail
 Phone 800.500.4433

Powered by
CALLSOURCE®

Ad Source:
 All
 Angie List
 ESPN700 Radio
 Facebook

Ad Type:
 All
 Broadcast
 Co-Op
 Direct Mail

3. Select Call Duration
 Choose start and stop time — or choose custom time range:
 From: Set Custom ▼ From: 0 sec ▼
 To: Set Custom ▼ To: Any sec ▼

4. Select Date Range
 Date Range:
 Custom Date Range
 Today
 Yesterday
 Week to Date (Starts Sun)

From: Mar 1 2014
 To: Mar 31 2014

5. Select Time and Day Filter
 From: All Hours To: All Hours Day(s) of week: All

VIEW REPORT

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However, if it is April 12 and the user is in the “April 2014” worksheet, then the program will select “Month to Date” for April. Then the “View Report” button is automatically clicked.

After clicking this a new internet explorer window is created. This brings up the following screen with all the lead source data for the month that callsource.com has collected.

Traffic Snapshot - Internet Explorer

HOME 514K

Traffic Snapshot
 HomeSite Windows & Doors
 run by DOrnell at 5:18:09 PM - 4/15/2014 PDT EXCEL Print Close

Date & Times: 3/31/2014 - 3/31/2014, All Hours, All Days
 Call Duration: Any Call Duration
 Locations: All
 Call Results: Connected Calls, No Answer Calls
 Ad Sources: Ad Source: All, Ad Type: All

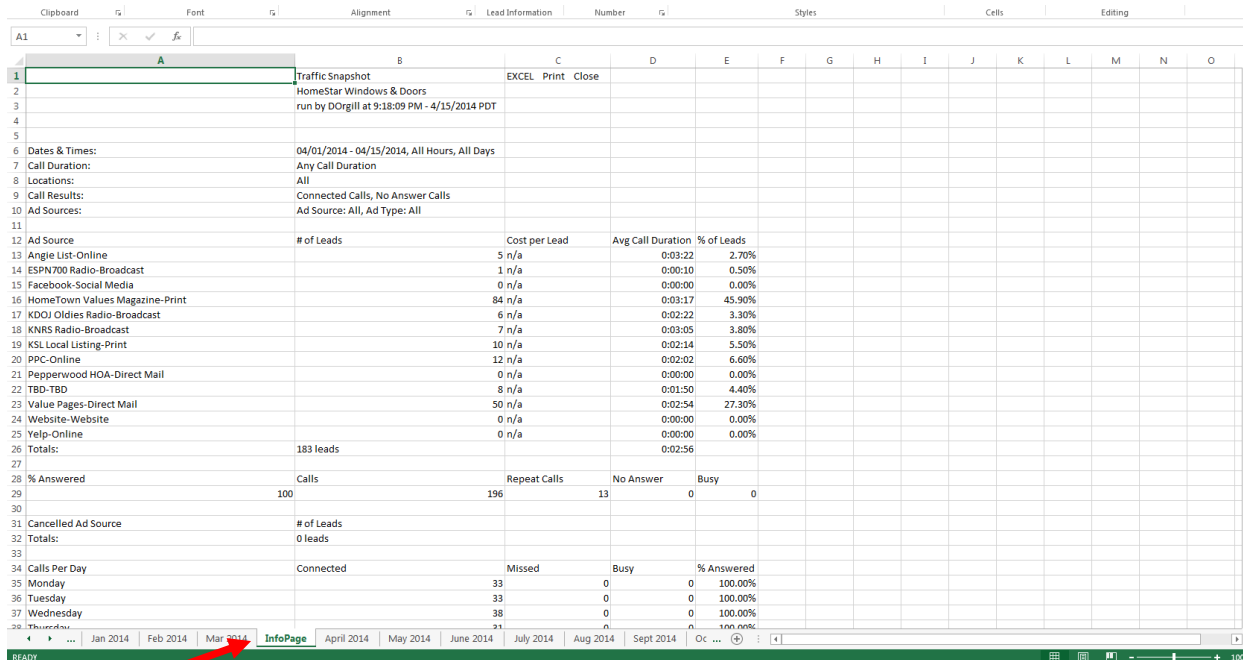
Ad Source	# of Leads	Cost per Lead	Avg Call Duration	% of Leads
Angie List-Online	1	n/a	0:03:22	2.7%
ESPN700 Radio-Broadcast	1	n/a	0:00:10	0.5%
Facebook-Social Media	0	n/a	0:00:00	0.0%
HomeTown Values Magazine-Print	24	n/a	0:03:17	45.9%
KDOJ Online Radio-Broadcast	6	n/a	0:02:22	3.3%
KNRS Radio-Broadcast	7	n/a	0:03:05	3.8%
KSL Local Living-Print	10	n/a	0:02:14	5.9%
PPC-Online	12	n/a	0:02:02	6.6%
Pippenwood HOA-Direct Mail	0	n/a	0:00:00	0.0%
TDS-TSD	0	n/a	0:01:50	4.4%
Value Pages-Direct Mail	50	n/a	0:02:54	27.3%
Website-Website	0	n/a	0:00:00	0.0%
Yelp-Online	0	n/a	0:00:00	0.0%
Totals:	103 leads		0:02:56	

% Answered	Leads	Unanswered Calls	No Answer	Busy
100.0%	103	0	0	0

Cancelled Ad Source	# of Leads
Totals:	0 leads

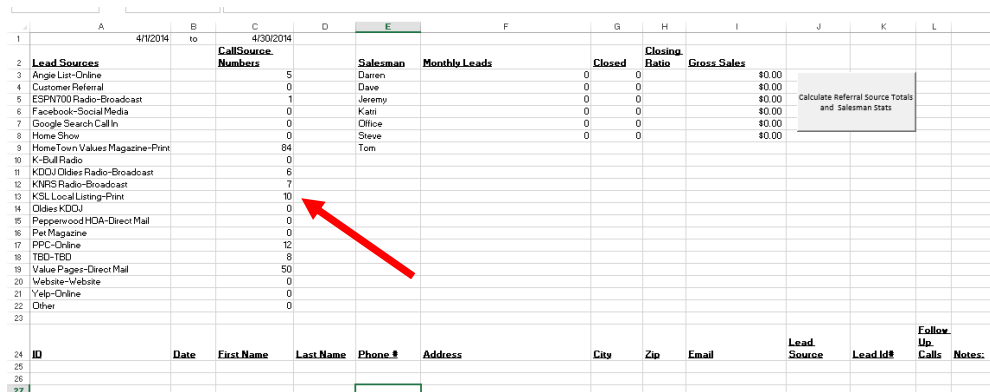
Day of Day	Connected	Unconnected	Busy	% Answered
Monday	33	0	0	100.0%
Tuesday	33	0	0	100.0%
Wednesday	30	0	0	100.0%
Thursday	31	0	0	100.0%

The agent in the VBA code attaches onto this new window. This whole page is then downloaded into Excel onto a newly created worksheet “Info Page.”



Clipboard		Font		Alignment		Lead Information		Number		Styles		Cells		Editing	
A1															
A		B		C		D		E		F		G		H	
1		Traffic Snapshot		EXCEL Print Close											
2		HomeStar Windows & Doors													
3		run by DOrgill at 9:18:09 PM - 4/15/2014 PDT													
4															
5															
6		Dates & Times:		04/01/2014 - 04/15/2014, All Hours, All Days											
7		Call Duration:		Any Call Duration											
8		Locations:		All											
9		Call Results:		Connected Calls, No Answer Calls											
10		Ad Sources:		Ad Source: All, Ad Type: All											
11															
12		Ad Source		# of Leads		Cost per Lead		Avg Call Duration		% of Leads					
13		Angie List-Online		5 n/a		0:03:22		2.70%							
14		ESPN700 Radio-Broadcast		1 n/a		0:00:10		0.50%							
15		Facebook-Social Media		0 n/a		0:00:00		0.00%							
16		HomeTown Values Magazine-Print		84 n/a		0:03:17		45.90%							
17		KDOJ Oldies Radio-Broadcast		6 n/a		0:02:22		3.30%							
18		KNRS Radio-Broadcast		7 n/a		0:03:05		3.80%							
19		KSL Local Listing-Print		10 n/a		0:02:14		5.50%							
20		PPC-Online		12 n/a		0:02:02		6.60%							
21		Pepperwood HOA-Direct Mail		0 n/a		0:00:00		0.00%							
22		TBD-TBD		8 n/a		0:01:50		4.40%							
23		Value Pages-Direct Mail		50 n/a		0:02:54		27.30%							
24		Website-Website		0 n/a		0:00:00		0.00%							
25		Yelp-Online		0 n/a		0:00:00		0.00%							
26		Totals:		183 leads		0:02:56									
27															
28		% Answered		Calls		Repeat Calls		No Answer		Busy					
29		100		196		13		0		0					
30															
31		Cancelled Ad Source		# of Leads											
32		Totals:		0 leads											
33															
34		Calls Per Day		Connected		Missed		Busy		% Answered					
35		Monday		33		0		0		100.00%					
36		Tuesday		33		0		0		100.00%					
37		Wednesday		38		0		0		100.00%					
38		Thursday		31		0		0		100.00%					
39															
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Then the program pulls in the “# of leads” for each lead source and inserts it into the worksheet that corresponds to the month. The Lead Source Master List and the list from callsoure.com do not need to match up exactly. The program goes through each item on the Lead source list and matches it up with the items on the callsource.com list. Then the number of leads is pasted into the corresponding cell.



A		B		C		D		E		F		G		H		I		J		K		L	
1		4/1/2014 to		4/30/2014																			
2		Lead Sources		CallSource Numbers		Salesman		Monthly Leads		Closed		Closing Ratio		Gross Sales									
3		Angie List-Online		5		Damen		0		0		0		\$0.00									
4		Customer Referral		0		Dave		0		0		0		\$0.00									
5		ESPN700 Radio-Broadcast		1		Jeremy		0		0		0		\$0.00									
6		Facebook-Social Media		0		Kari		0		0		0		\$0.00									
7		Google Search Call In		0		Office		0		0		0		\$0.00									
8		Home Show		0		Steve		0		0		0		\$0.00									
9		HomeTown Values Magazine-Print		84		Tom		0		0		0		\$0.00									
10		K-Bull Radio		0				0		0		0		\$0.00									
11		KDOJ Oldies Radio-Broadcast		6				0		0		0		\$0.00									
12		KNRS Radio-Broadcast		7				0		0		0		\$0.00									
13		KSL Local Listing-Print		10				0		0		0		\$0.00									
14		Oldies KDOJ		0				0		0		0		\$0.00									
15		Pepperwood HOA-Direct Mail		0				0		0		0		\$0.00									
16		Pet Magazine		0				0		0		0		\$0.00									
17		PPC-Online		12				0		0		0		\$0.00									
18		TBD-TBD		0				0		0		0		\$0.00									
19		Value Pages-Direct Mail		50				0		0		0		\$0.00									
20		Website-Website		0				0		0		0		\$0.00									
21		Yelp-Online		0				0		0		0		\$0.00									
22		Other		0				0		0		0		\$0.00									
23																							
24		ID		Date		First Name		Last Name		Phone #		Address		City		Zip		Email		Lead Source		Lead Id#	
25																							
26																							
27																							

Then the “Info Sheet” is deleted. The active worksheet now has all the callsource.com numbers inserted.

Discussion of Learning and Conceptual Difficulties Encountered

I learned an enormous amount about VBA while doing this project. First and foremost, I learned that I could do many things with VBA on my own without the help of an example in class. I thought that I would always need a similar replica of the project I was working on to reference in order to successfully make VBA work. But this project proved to me that I could make a cool program without the use of a prototype to go off of.

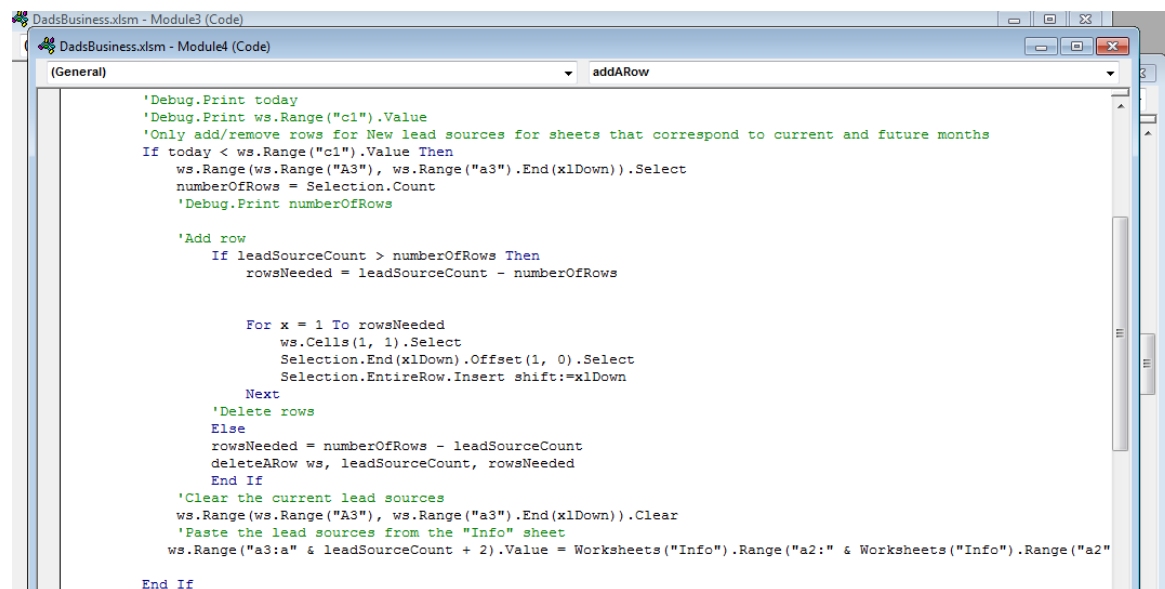
I ran into some difficulty with the new window that Internet Explorer produced. I couldn't figure out how to attach to a new agent window. Luckily, Gove helped me solve this problem by using the .attach function that is written into the agent model.

```
a.waitForLoad

a.attach "http://www.calltrackdata.com/webreports/reports/TrafficSnapshotReport.jsp?rvcount=1&d="
a.waitForLoad
```

I also had a difficult time selecting two options from a drop down menu while controlling Internet Explorer. I tried a million different things but I couldn't figure it out. Finally Gove helped me to use an If..Or.. Statement and change the .selected attribute to select two options at once.

I learned how to insert new rows and remove rows using VBA.



I mastered Loops and If statements. I finally mastered using .end(xlup/down/right/left). For some reason, I never really understood how those worked until this project. I created three user forms on this project and I feel very competent in creating these now. I also learned how to add new buttons to the ribbon. This is one of the coolest things I've learned how to do!

Assistance

I'm not sure what classifies assistance as "substantial" but I did receive help from Gove on several occasions and a lot of help from Nathan. They helped me work through some of the problems that I ran into. Although, I feel that for the most part, I wrote all of my code.