

# Quarterly Reports

**What are they and how to get them done?**

Presented by

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NEW MEXICO  
**MAINSTREET**<sup>™</sup>

# The Basics

**Quarterly Reports** -- tracking the performance of each local

NMMS organization

Businesses & Jobs

Building Purchases & Construction

Public & Private Investment

Grants

Volunteer Hours

Events & Promotions



# Quarterly Reports

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- There are two forms to fill out:
  - An excel form and a form that is filled out online via Salesforce.
  - You should receive an automatic message from Salesforce about the questionnaire.
  - You should fill out the excel form first and upload it to Salesforce.
  - Then fill out the questionnaire.
  - Please send me an email from your MainStreet org email; so we can verify your information has been updated. [Lucas.Pedraza@State.nm.us](mailto:Lucas.Pedraza@State.nm.us)
- Some basic guidelines:
  - Only report on activity within your MainStreet district boundary.
  - Create a system of tracking board and volunteer hours spent in meetings or working on projects.
  - Make a routine of walking or driving around your district to spot activity happening.
  - Always be prepared to contact people/businesses BEFORE the reporting deadline.



# Data Collection/Definitions

- Private building interior and exterior improvements/rehabilitations.
- New businesses opening.
- Businesses closing.
- Businesses expanding.
- FTE Jobs.
- Building Purchases.
- Public sector improvements.
- Public/Private projects.
- New private buildings being constructed.
- Grants your organization receives.
- Events and promotions you that have occurred.
- Housing development.
- Volunteer hours.



# Login

Sign in.

**Username**

**Password**

Login

[Forgot Your Password?](#)

Please enter your username and password to login.

First click into your applications.

## My Applications



Click the pencil icon beside the selected draft under Actions to continue editing.



Click the printer icon beside the selected record under Actions to print.



When visible, allows an applicant to file reports. Only available for "Funded/Approved" applications and authorized applications.







When visible, allows an applicant to delete a draft application.

To access reporting, please click on the corresponding application ID link in the table below. On the next page click the green edit button to edit your report. The link will take you to the Report.

page 1 of 1 (3 records total)

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Page Size


















Application Id	Name	Organization Name	Primary Contact	Status	Funded/Approved	Actions
<a href="#">APP-016114</a>	FY23 Local Economic Assistance & Development Support (LEADS)	MainStreet Truth or Consequences	Kari Fresquez	Declined	<input type="checkbox"/>	
<a href="#">APP-014726</a>	FY22 Local Economic Assistance & Development Support	MainStreet Truth or Consequences	Blanch Almquist	Approved	<input checked="" type="checkbox"/>	 
<a href="#">APP-011043</a>	NMMS Application	MainStreet Truth or Consequences	Kate Hall	Submitted	<input checked="" type="checkbox"/>	 

This is where the quarterly reports are.

## Funding Application for: NMMS Application

Reports These are reports that have already been submitted, if you ever need to refer to prior reports.

[New Report](#)

Report Id	Name	Reporting Quarter	Reporting Due Date	Status	Submit Date	Action
<a href="#">APP-011482</a>	NMMS Quarterly Report	Q1-2018	4/10/2018	Submitted	10/3/2018, 4:47 PM	
<a href="#">APP-011483</a>	NMMS Quarterly Report	Q2-2018	6/10/2018	Submitted	10/3/2018, 6:07 PM	
<a href="#">APP-011541</a>	NMMS Quarterly Report	Q3-2018	10/10/2018	Submitted	10/11/2018, 2:49 PM	
<a href="#">APP-011743</a>	NMMS Quarterly Report	Q4-2018	12/10/2018	Submitted	12/10/2018, 4:20 PM	
<a href="#">APP-012153</a>	NMMS Quarterly Report	Q1-2019	4/10/2019	Submitted	4/9/2019, 4:14 PM	
<a href="#">APP-012357</a>	NMMS Quarterly Report	Q2-2019	6/10/2019	Submitted	6/10/2019, 4:41 PM	
<a href="#">APP-012699</a>	NMMS Quarterly Report	Q3-2019	10/10/2019	Submitted	10/7/2019, 4:04 PM	
<a href="#">APP-012893</a>	NMMS Quarterly Report	Q4-2019	12/10/2019	Submitted	12/9/2019, 2:51 PM	
<a href="#">APP-013241</a>	NMMS Quarterly Report	Q1-2020	4/10/2020	Submitted	4/1/2020, 12:02 PM	
<a href="#">APP-013698</a>	NMMS Quarterly Report	Q3-2020	10/10/2020	Submitted	10/9/2020, 2:03 PM	
<a href="#">APP-014009</a>	NMMS Quarterly Report	Q4-2020	1/10/2021	Submitted	1/4/2021, 1:16 PM	
<a href="#">APP-013412</a>	NMMS Quarterly Report	Q2-2020	7/10/2020	Submitted	7/6/2020, 1:47 PM	
<a href="#">APP-014486</a>	NMMS Quarterly Report	Q1-2021	4/10/2021	Submitted	4/9/2021, 1:41 PM	
<a href="#">APP-014836</a>	NMMS Quarterly Report	Q2-2021	7/10/2021	Submitted	7/9/2021, 3:00 PM	
<a href="#">APP-015865</a>	NMMS Quarterly Report	Q1-2022	4/10/2022	Submitted	4/11/2022, 4:11 PM	
<a href="#">APP-016598</a>	NMMS Quarterly Report	Q3-2022	10/10/2022	Draft		 

The draft version is the application you need to fill out.

[« Back to Application](#)

## NMMS Quarterly Report

Click edit to start entering your data.

Edit

Print

### Information

<b>Id</b>	APP-016598	<b>Project Number</b>	
<b>Project Name</b>	Truth or Consequences Quarterly Reports	<b>Name</b>	NMMS Quarterly Report
<b>Organization Name</b>	MainStreet Truth or Consequences	<b>Status</b>	Draft
<b>Contact Name</b>	Kate Hall	<b>Fiscal Year</b>	

### Status

<b>Submit Date</b>		<b>Funded/Approved</b>	<input type="checkbox"/>
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### Project/Program Description

<b>Administrator Email</b>	daniel.gutierrez2@state.nm.us
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## Report for: MainStreet Truth or Consequences

Record ID

APP-016598

Due Date Status

Due Now

Click next to go through each page of the report you can fill in.

▼ **1. Overview**

[Save & Exit](#) [Next »](#) [Submit Report](#) 

| = Required Information

### Overview

Instructions for applicants TBD from Daniel

[Save & Exit](#) [Next »](#) [Submit Report](#) 

| = Required Information

▶ **2. Contact Information**

▶ **3. Workbook**

▶ **4. Private Building Improvements and Rehabilitations**

▶ **5. Business Openings, Closings and Expansions**

▶ **6. Building Purchases**

▶ **7. Public Sector Improvments**

▶ **8. Public/Private Projects**

▶ **9. New Building Constructions**

▶ **10. Mainstreet grants**

▶ **11. Mainstreet events and promotions**

▶ **12. Housing**

▶ **13. Volunteers**

▶ **14. Review & Status**



Due Date Status Past Due

- ▶ **1. Overview**
- ▶ **2. Contact Information**
- ▼ **3. Workbook**

Save & Exit Save Previous Next Submit Report

= Required Information

## Workbook

Please download the worksheet here

**Question 6**

**Completed worksheet ?**  
no uploaded files

Upload your excel worksheet here. It is also a good practice to store these locally on your computer.

Save & Exit Save Previous Next Submit Report

= Required Information

Save & Exit

Save

« Previous

Next »

Submit Report



| = Required Information

## Business Openings, Closings and Expansions

### | Question 9

Total # of new businesses added

### | Question 10

Total # of jobs added from new businesses

### | Question 11

Total # of businesses closed

Make sure you fill in every box on every tab and page. Even if you don't have anything to report, enter a zero. Otherwise you will not be able to submit your report at the end.



**Total # of businesses closed**

**| Question 12**

**Total # of jobs lost**

**| Question 13**

**Total # of net new businesses (# openings - # closings)**

**| Question 14**

**Total # of businesses expanded**

**| Question 15**

**Total # of jobs added from expansions**

**| Question 16**

**Total # net new jobs**

For categories where you would have a negative number, such as jobs lost, you can just enter the number of jobs lost. For categories that are a Net figure you can enter the negative sign. Please use numbers calculated in the excel.

## Mainstreet grants

- ✘ Total # of public sector grants
- ✘ Total amount of public sector grants (\$)
- ✘ Total # of private sector grants
- ✘ Total amount of private sector grants (\$)

## Mainstreet events and promotions

- ✘ Total # of events
- ✘ Total event profits (\$)
- ✘ Total # of promotions
- ✘ Total promotion profits (\$)

## Housing

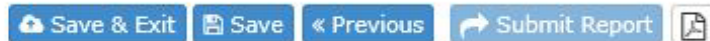
- ✘ Total # of housing projects
- ✘ Total value of housing projects (\$)
- ✘ Total # of housing units

## Volunteers

- ✘ Total number of volunteers
- ✘ Total # of volunteer hours

This is the final page. On the left you can see if you have inputted all required fields anything that has not been properly filled out will have a red X next to it.

This button will be filled in or highlighted once all fields have been filled out. Your report will not be complete until you click 'Submit Report'.



Done

Cancel

Thank You!

[nmmainstreet.org](http://nmmainstreet.org)



NEW MEXICO  
**MAINSTREET**<sup>™</sup>

ENGAGE PEOPLE • REBUILD PLACES  
REVITALIZE ECONOMIES



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