



Issue
Feature

User Guide

Important Update for Slab Pricing

➤ Slab Pricing ReMake Update (2024.02.19)

- There are 2 ways to handle Slab Based Pricing when a ReMake Issue is prevalent.
 - 1) ReMake top can be remade from Existing Slab that the client has paid for
 - 2) A new Slab is needed to fabricated the “ReMake Top”

Thank you to our users for adopting the Issue Feature and providing feedback. We value your responses and will work towards making this a great feature to track all of your Issues and ReMakes

Slab Pricing – ReMake from Original Slab

- ReMake from the Original Slab when priced “by the Slab”
 - If there is a top/piece that needs to be remade but the piece/top can be sourced from the original slab, go through the below steps:
 - Select the broken piece/top
 - Duplicate the piece/top
 - Scroll to the right and designate that piece as a “Remake”
 - Calc & Save
 - Since the piece/top is being remade from the original slab and it is a Slab-Based job, the only subsequent cost from the “Issue” will be the fabrication labor on the remade piece/top.
 - Any revenue associated to the remade piece/top should be zeroed out
 - Use the “additional SKU Line Items” and Override for any additional costs/rev associated to the issue

Slab Pricing – ReMake for New Slab

- ReMake using a New Slab when priced “by the Slab”
 - Duplicate the area
 - Open the Duplicated AREA and delete the Tops that are not part of the ReMake
 - Scroll to the right and designate the broken piece/top as a “Remake”
 - Go to Inventory Details and override the REV\$\$ to \$00.00 for the slab that is being used to fabricate the broken piece/top
 - Select Rev Lock checkbox
 - Calc/Save
 - Since the piece/top is being remade from a new slab and it is a Slab-Based job, the subsequent costs from the “Issue” will be the cost of the slab and fabrication labor for the remade piece/top.
 - Any revenue associated to the ReMade piece/top should be zeroed out
 - Use the “additional SKU Line Items” and Override for any additional costs/rev associated to the issue

User Guide Sections

- What's an Issue
- Reasons for Issues
- How to Capture
- Reporting of an Issue
- Issue Actions
- Material ReMakes
- Non Inventory Issues (Additional Costs/Revenue)
- Incident Issues
- Job/Area Reports (Job Site Details, Invoice)

Issue Process – What is an Issue

- Any Reason the Job, or portion of the Job, did not go as planned or the expected Revenue \$\$ was not realized
 - Shop ReMake
 - Template, Programming, Fabrication, Installation Error
 - Material Issues
 - Miscommunication between any/all Parties causing discrepancies on the Job
 - Job Deadline was missed
 - Good Will Adjustment

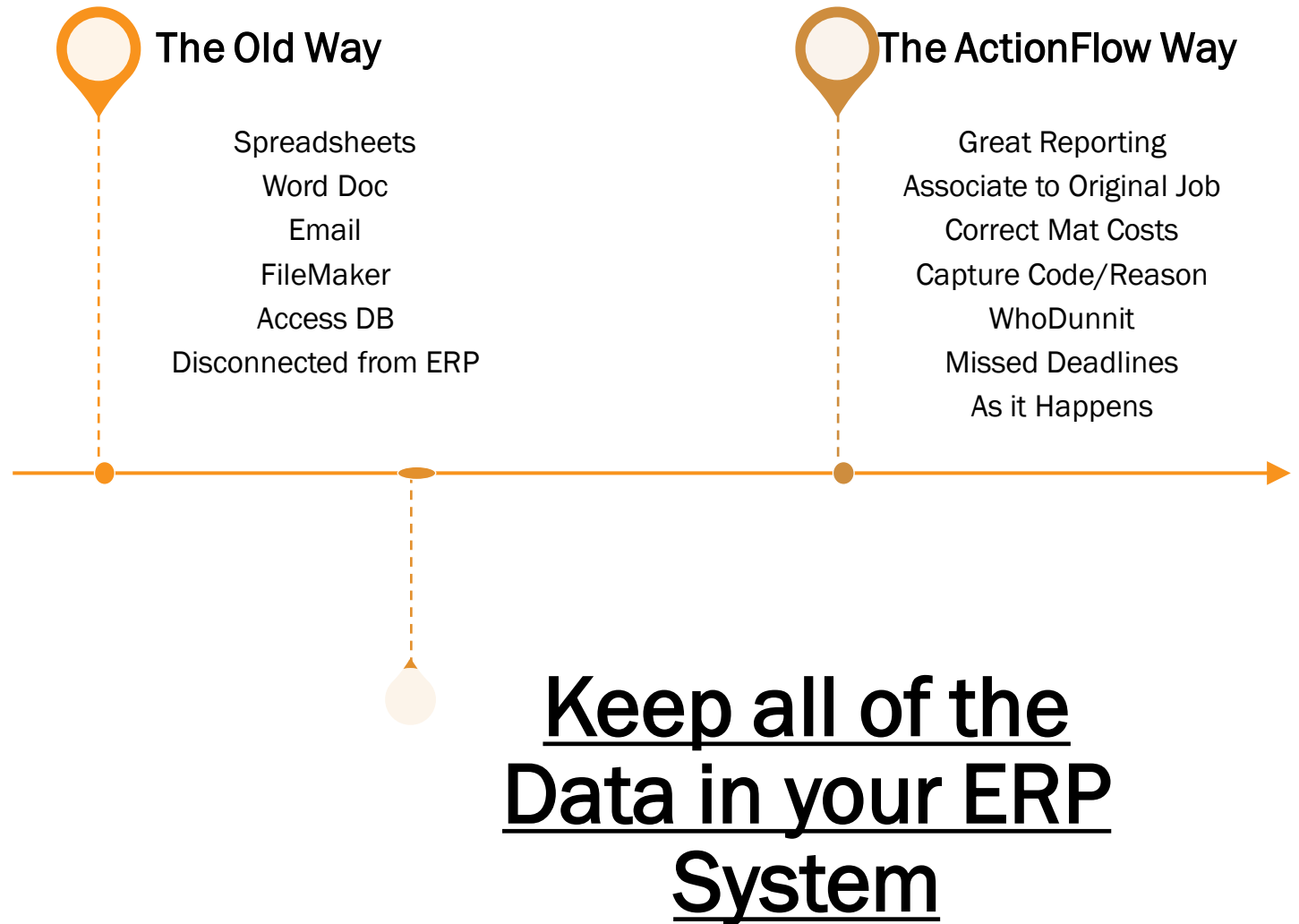
- AKA – ReMake, ReDo, Claim, Service Call, CallBack, Customer Complaint, PinPoint Status low ratings

ISSUE Reasons

- Material
- Machine
- Our Company Employee
- Vendor/Supplier
- Customer
- Third Party Contractor
- Communication

Capture the Data

- How?
- Where?
- When?



Reporting

- Issues Categories and Reasons
 - Within AF Report Module
 - Date Range
 - Missing Deadlines
 - Job Details
 - Issue Costs
 - Issue Revenues
 - Category (high level)
 - Reasons (granular level)
 - Who
 - Comments

Category/Reason Codes

- Issue Category
- Issue Reason Codes

Version 4.2.0.55

Enterprise **Configurations** Report Configurations SKU Items

View Predefined Configuration Set

Standard Configurations Configurations for Special Enterprise Record **Global**

Use the table below to define the global dropdown lists that display on multiple forms throughout Illumination

+	Sort	FieldName	ReadOnly?	Sum?	Warning	QtWiz?	Roles Hidden From
	>	✗ IssueReasonCAD/Eng	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonCustomer	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
✗		✗ IssueReasonFabrication	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonInstall	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonMaterial	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonPurchasing	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonSales	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonScheduling	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonSupplier	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		✗ IssueReasonTemplate	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Values for Dropdown Box

Clear Dropdown List

+	Value	Description	Order
	✗ CNC Bit Issue		1
	✗ Damaged Top		2
	✗ Incorrect Faucet Hole Drilled In Shop		3
	✗ Material		4
	✗ Miss Cut/Layout Error		5
	✗ Missed Detail In Fabrication		6
>	✗ Mitered Edge Poorly Done/Voids In Edge		7
	✗ Other		8
	✗ Piece Fabricated Mirror Mode		9
	✗ Piece Movement On CNC		10
	✗ Polish Missed/Poorly Done		11
	✗ Repair In Shop - Poor Quality		12
	✗ Saw Issue		13
	✗ Sharp/Rough Edges		14
	✗ Splash Error		15
	✗ Splash Height Variance		16
	✗ Wrong Color Cut		17
	✗ Wrong File Cut		18
	✗ zz Other - see comments		99

Alpha Sorts List in User Interface

Report Options

- Incidents Only
- Summary Report Totals
- Summary Category Totals

Report: **Issues Category And Reason**
1 of 13
Email

FromDate:

Account: Null

Category: Null

Show Job Details:

ThroughDate:

User:

Show Only Missed Deadlines:

Issue Report of Incidents Only

Issues Category And Reason

From: 1/1/2024 Through: 1/31/2024

Report Totals

Total Issues:	128	Total Missed Deadlines:	2
Total Affected Jobs:	120	Total Remake SqFt:	280.70
	<i>Revenue</i>	<i>Cost</i>	<i>Margin</i>
Material:	\$0.00	\$9,173.66	(\$9,173.66)
Non-Material:	\$687.50	\$4,361.11	(\$3,673.61)

Category Totals

Sales:	5	Material:	6
Template:	10	Fabrication:	4
Customer:	74	Install:	28
CAD/Eng:	1	Supplier:	0
Purchasing:	0	Scheduling:	0

Category: Customer

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Customer - Other Reason	1/3/2024	629671 - Remake Top A	<input type="checkbox"/>	0.00	Miner, Amy & Todd			- HO was unhappy w/ seam - return service clean and float area - 1 hour labor (est)
Customer - Caused Damage	1/3/2024	608180 - Kitchen/Laundry/Vanity - COMBO other Job #626524	<input type="checkbox"/>	0.61	Platte, Larry			- return service to repair chips in top - 30 min labor (est)
Customer - Caused Damage	1/3/2024	594701 - Cambria Chip Repair	<input type="checkbox"/>	0.00	Fiebig, Ryan			- Return service to fill chip - .5 hours crew time
Customer - Other Trade Issue	1/3/2024	622721 - Kitchen/Pantry	<input type="checkbox"/>	0.00	Clarke			- return service to set splash once set on cab was installed - drilled faucet holes - 2 hours labor (est)
Customer - Caused Damage	1/3/2024	610292 - Kitchen/Island/Baths	<input type="checkbox"/>	7.35	Kolb, Mary Ann			- return service to repair chips in top - 30 min labor (est)
Customer - Caused Damage	1/4/2024	621457 - Vanity SS	<input type="checkbox"/>	0.00	Cones, Debbie		t	- HO had small chip Cambria top - HO has scratch on Corian vanity top - 1.5 hours service time to fill chip and buff out scratch. JR
Customer - Caused Damage	1/4/2024	627192 - Kitchen	<input type="checkbox"/>	0.00	Bekemeier, David & Cathy			- HO had sizable impact chip on profile - crew was able to use chip to repair area - 1.5 hours labor (est)

Report Options

- Incidents Only
- Summary Report Totals
- Summary Category Totals
- Job Details by Area

Report: Issues Category And Reason

FromDate: 1/1/2024 ThroughDate: 1/31/2024

Account: [Redacted] User: [Redacted] Null

Category: [Redacted]

Show Job Details:

Issue Report with Job Details

DETAILS

Issues Category And Reason

From: 1/1/2024 Through: 1/31/2024

Report Totals			
Total Issues:	128	Total Missed Deadlines:	2
Total Affected Jobs:	120	Total Remake SqFt:	280.70
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Category: Customer

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124738	Service - Chip	ST Warranty	Service Call	Non-Material	\$0.00	\$0.00																										

Report Options

- Incidents Only
- Summary Report Totals
- Summary Category Totals
- Job Details by Area
- Missed Deadlines

Report: Issues Category And Reason

FromDate: 1/1/2024 ThroughDate: 1/31/2024

Account: Null User: Null

Category: Null

Show Job Details: Show Only Missed Deadlines:

Details & Missed Deadlines

Issues Category And Reason

From: 1/1/2024 Through: 1/31/2024

Report Totals			
Total Issues:	2	Total Missed Deadlines:	2
Total Affected Jobs:	2	Total Remake SqFt:	7.30
	<i>Revenue</i>	<i>Cost</i>	<i>Margin</i>
Material:	\$0.00	\$223.78	(\$223.78)
Non-Material:	\$0.00	\$50.00	(\$50.00)

Category Totals	
Sales:	0
Material:	0
Template:	0
Fabrication:	0
Customer:	1
Install:	1
CAD/Eng:	0
Supplier:	0
Purchasing:	0
Scheduling:	0

Category: Install

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Install - Splash Cut Short On-Site	1/19/2024	630837 - Remake Splash 1 & 4	<input checked="" type="checkbox"/>	4.00	Smith, John & Kari		Nate Feinman	Crew cut outlets wrong - 1.0 Hours crew time to return & install

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue
124735	Splash 1	S1-1 (Remake)	Cambria Quartz	Material	\$192.98	\$0.00
124735	Splash 1	S1-1 (Remake)	Edge Profile	Non-Material	\$0.00	\$0.00
124735	Splash 1	Labor \$	XClaim - Costs	Non-Material	\$50.00	\$0.00

Category: Customer

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Customer - Changed Mind After Template	1/22/2024	631385 - Remake D, E, & F	<input checked="" type="checkbox"/>	3.30	Livingston, Janine			-EU expectations -remaking D, E & F - 2 hrs (est) labor tmh

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue
126173	remake D E & F Remake	Corian Solid	Material	Material	\$30.80	\$0.00
126173	remake D E & F Remake	Edge Profile SS	Non-Material	Non-Material	\$0.00	\$0.00

Missed Deadlines

Was not able to complete the Scheduled Install Date

Was not able to realize the Scheduled T\$ or Revenue as anticipated

What's in an Action???

➤ ISSUE Actions

- Specific to the general area where ISSUE occur
 - Programming
 - Fabrication
 - Installation
 - Service Call
 - Post Install Issues
- Responsible to collection Category/Reason Codes and Details about the Issue
- Responsible for generating the necessary information to populate the Category and Issues Report

“No Issue Action = No Issue Report”

How does the Data Appear on the Report

FAB ST - 00b Program SAW Complete **STOP** Typically associated with a Programming Issue
Pgm SAW Issue Handle ST 00b Program SAW Problem 1 na FAB ST - 00b Program SAW
Pgm SAW Issue - Requires New Material ISSUE Program SAW ST - Reason Code na FAB ST - 00b Program SAW

FAB ST - 00c Program CNC Complete **STOP**
Pgm CNC Issue Handle ST 00c Program CNC Problem 1 na FAB ST - 00c Program CNC
Pgm CNC Issue - Requires New Material ISSUE Program CNC ST - Reason Code na FAB ST - 00c Program CNC

FAB ST - 02 Saw Complete **S** **STOP** Typically associated with a mechanical or human problems
Saw Problem Handle ST 02 Saw Problem 1 na FAB ST - 02 Saw Rnd2 Complete
Issue - Requires New Material ISSUE Fab ST - Reason Code na
Handle ST 02 Saw Problem 1 na FAB ST - 02 Saw Rnd2 Complete

All Production Actions have the similar decisions (Complete, xx Problem, Issue - Requires New Material)

ISSUE Programming/Fabrication Action

How does the Data Appear on the Report

The screenshot displays a software interface with a light green background. On the left, there is a vertical sidebar with a large 'Install' button. The main area contains a list of actions. At the top, there is a 'Complete' button with a right-pointing arrow and the number '1'. Below this, the first action is 'Callback' with a dropdown menu. A red box highlights the 'Callback' text, and a red arrow points from it to a dropdown menu labeled 'ISSUE Install - Reason Code'. The second action is 'Callback Customer' with a dropdown menu. A red box highlights the 'Callback Customer' text, and a red arrow points from it to another dropdown menu labeled 'ISSUE Install - Reason Code'. To the right of these dropdowns, there are buttons for 'OK', 'Confirm Fulfillment Date', 'No Contact', 'Schedule Return Trip', and 'Not Ready'. A 'na STOP' icon is also visible next to the dropdowns.

ISSUE Install Action

How does the Data Appear on the Report

1 - Shop ReMake (Mat-Fab) Confirm RM Material

2 - Service - Billable Schedule Service

3 - Service - Warranty Schedule Service

4 - ReMake BTB (Mat-Fab-Install) ReMake BTB Job Approval

5 - ReMake Template (Mat-Fab-Install) ReMake Template Job Approval

6 - MOD BTB (Fab-Install) MOD BTB Approval

7 - MOD Template (Fab-Install) MOD Job Approval

8 - ReSchedule ReSchedule Fulfillment

* ISSUE General - Reason Code

CLAIM

ISSUE General Action

Questions about Job Issue Actions

➤ How are the Issue Actions added to a Job?

- Included as part of the Process
- Action Manually Add as needed

➤ When is the Issue Action Added?

- Naturally as part of the Pre-Designed Process
- Whenever an Issue needs to be reported

➤ Do I need to STOP the Progress of the Job to record an Issue?

- No, if it involves Material, but it should be recorded before the job is invoiced
- No, if it is only an Incident Issue

➤ What to do if the Job Status = Installed

- Create a new job to deal with the Issue

How to Record a ReMake (material)

- Open Original Job/Area
- Duplicate the Top(s) portions of the Top that needs to be ReMade
- Expand the Top List
- Check the ReMake Checkbox on the Top that will be ReMade
 - ReMake Tops will automatically be included in the ISSUE Report (See Area Lines Issue checkbox)
 - Calc/Save
 - Lines that are part of the ReMake will not generate a Revenue \$
 - Lines that are part of the ReMake will reflect a Cost
 - ReMake Lines on an Area will not publish on Customer Facing Documents

Area #: 8242

Revision #: 0

Revision: Active

CalcType: 01 Retail

Name: Kitchen

Material: Granite 3cm

Color: Black Pearl Antique - 3cm

Unit: Slab SqFt

Orig Unit: SqFt Category: AMG Series 02

Name OR:

Edge Def: 3cm Eased Lock

Inventory Items Show Slabs on Drawing

Description: Includes template and installation

Fab Notes:

Show splash separately

Markup %: 0

Target Value: \$1,672.34 AfterTax PreT

Top List:

Depth: 25.500



	SqFt	Name	Status	Splash	Step2	Remake	Se
1	10.244		Fabricated				
>	10.244	ReMake	Quoted			<input checked="" type="checkbox"/>	

Top Details:

Top #: 2

Name: ReMake

Length: 50.000

Depth: 25.500

Splash Height: 4.000

SqFt: 10.244

Finished LnFt: 4.167

Squared Radius:

Rectangle:

Edge (X): 3cm Eased

Lamination/Miter Width: 0.000

2nd Edge (||):

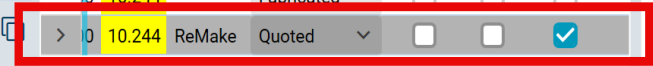
2nd Lamination/Miter Width: 0.000

Dimensions: Hidden Inside Outside

Line Items:

Other:

ReMake Checkbox on Duplicated Top triggers both ReMake & Issue

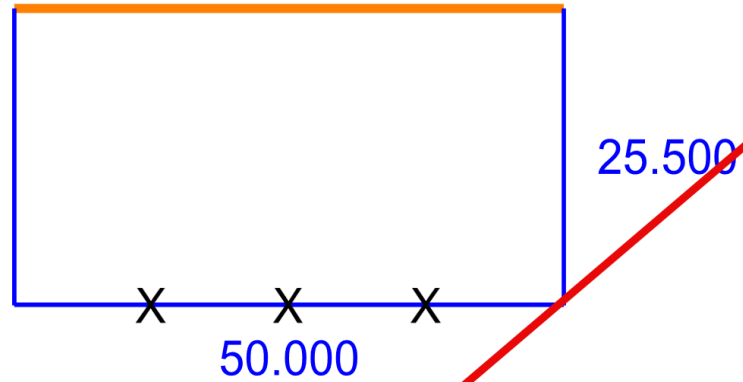


25.500

ReMake Checkbox

~ No Revenue \$\$ in Area Summary for the ReMake Top
~ Auto Sets Issue on the Area Lines

1, 3cm Eased, Hght:4.00
50.000



2, ReMake, 3cm Eased, Hght:4.00
50.000



Revenue:	\$836.17
Pre-tax Rev:	\$836.17
Square Feet:	10.24
\$ Per SqFt:	\$81.66
Pre-tax Cost:	\$491.01
Margin:	\$345.16
Margin Pct:	41.28%

Description	Revenue
10.24 SqFt - Granite 3cm: Black Pearl Antique - 3cm	\$552.96
10.24 SqFt - Granite 3cm: ReMake (Remake)	\$0.00
4.17 LnFt - Edge Profile: 3cm Eased	\$4.17
4.17 LnFt - Edge Profile: ReMake (Remake)	\$0.00
10.24 SqFt - Fabrication: Fabrication Charge (HC)	\$168.96
10.24 SqFt - Install Labor: Install Charge (HC)	\$110.08
10.24 SqFt - Metrics: TFI - Std (HC)	\$0.00

ReMake Checkbox triggers the ReMake of Top #2

Cost Definitions Show: Cost T\$ View: BASIC **ADVANCED** Edit View **Calc & Save** Undo Job: 7416-zzFabchoice, Primary Home

Customer Layout Line Items Fabrication Layout DXF

Select SKU Class for New Line Item: Template Splash Show Optional Line Items

Class	SKU Name	Inv?	Override SKU Name	Append to SKU Name	Spl?	Issue?	Qnt	Top Qnt	Unit Cost	Override Unit Cost	Unit Revenue	Override Unit Revenue	Override Percentage	Extended Cost	Extended Revenue
Granite 3cm	Black Pearl Antique - 3cm	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	10.240	n/a	SqFt	\$18.125				\$185.60	\$552.96
Granite 3cm	Black Pearl Antique - 3cm	<input checked="" type="checkbox"/>	ReMake (Remake)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	10.240	1	SqFt	\$18.125				\$185.60	\$0.00
Edge Profile	3cm Eased	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	4.170	n/a	FLnFt	\$0.000				\$0.00	\$4.17
Edge Profile	3cm Eased	<input type="checkbox"/>	ReMake (Remake)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	4.170	1	FLnFt	\$0.000				\$0.00	\$0.00
Fabrication	Fabrication Charge (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	10.240	n/a	SqFt	\$0.000				\$0.00	\$168.96
> Install Labor	Install Charge (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	10.240	n/a	SqFt	\$0.000				\$0.00	\$110.08
Metrics	TFI - Std (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	10.240	n/a	SqFt	\$11.700				\$119.81	\$0.00

Area Summary

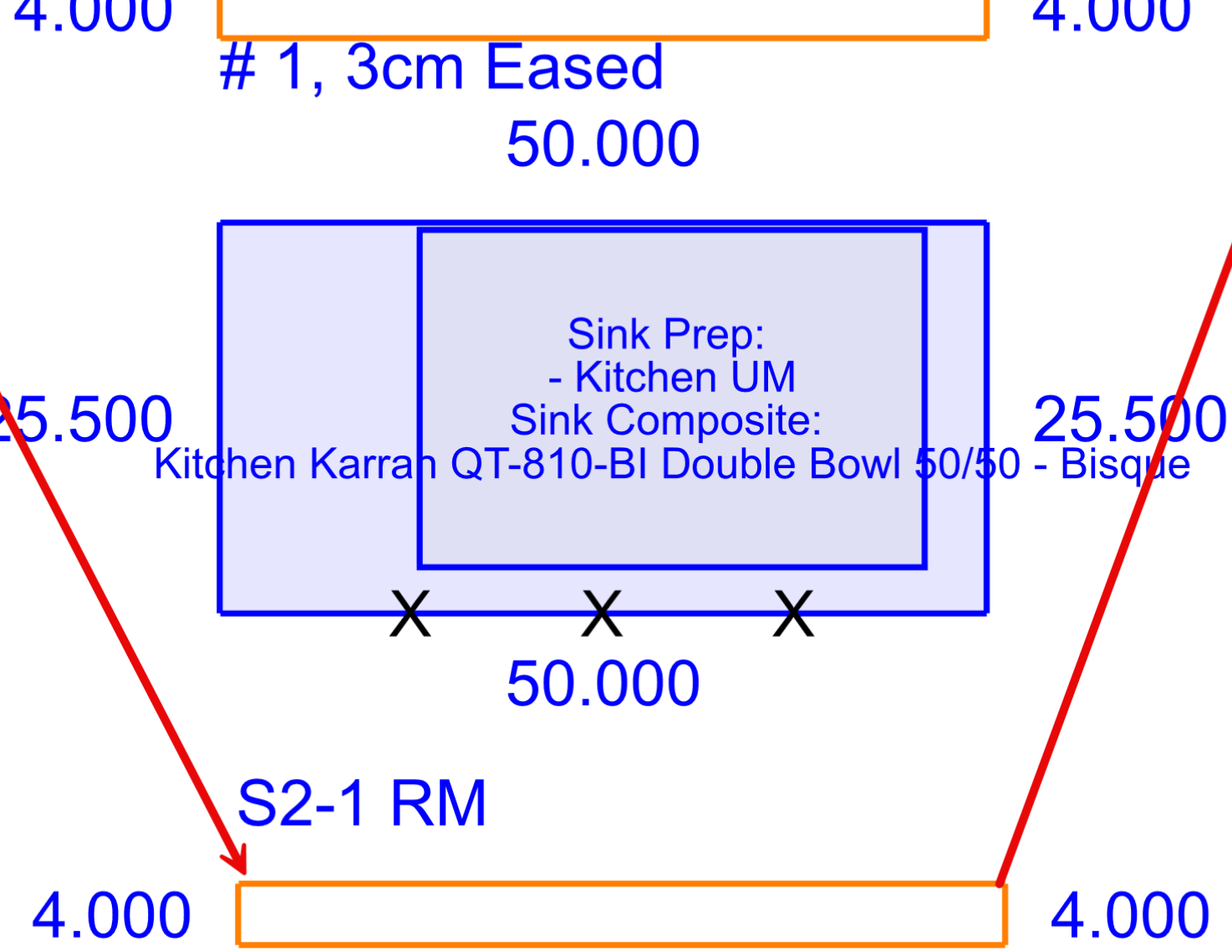
Revenue:	\$836.17
Pre-tax Rev:	\$836.17
Square Feet:	10.24
\$ Per SqFt:	\$81.66
Pre-tax Cost:	\$491.01
Margin:	\$345.16
Margin Pct:	41.28%

Description	Cost	Revenue
10.24 SqFt - Granite 3cm: Black Pearl Antique - 3cm	\$185.60	\$552.96
10.24 SqFt - Granite 3cm: ReMake (Remake)	\$185.60	\$0.00
4.17 LnFt - Edge Profile: 3cm Eased	\$0.00	\$4.17
4.17 LnFt - Edge Profile: ReMake (Remake)	\$0.00	\$0.00
10.24 SqFt - Fabrication: Fabrication Charge (HC)	\$0.00	\$168.96
10.24 SqFt - Install Labor: Install Charge (HC)	\$0.00	\$110.08
10.24 SqFt - Metrics: TFI - Std (HC)	\$119.81	\$0.00

Remake Lines & Area Summary

90°

0-BI Double Bowl 50/50 - Bisque



1.39 SqFt - Granite 3cm:	\$25.19	\$0.00
S2-1 RM (Remake)		
4.17 LnFt - Edge Profile: 3cm Eased	\$0.00	\$4.17
1.00 Each - Sink Prep: - Kitchen UM	\$0.00	\$200.00
1.00 Each - Sink Composite: Kitchen Karran QT-810-BI Double Bowl 50/50 - Bisque	\$205.00	\$450.00
1.00 - Faucets: S/O - Vanity Faucet Karran KBF442MB Kassel - Matte Black	\$133.00	\$190.00
10.24 SqFt - Fabrication: Fabrication Charge (HC)	\$0.00	\$168.96
10.24 SqFt - Install Labor: Install Charge (HC)	\$0.00	\$110.08
10.24 SqFt - Metrics: TFI - Std (HC)	\$119.81	\$0.00
1.00 Each - Misc:	\$0.00	\$150.00
Delivery Fee (per mile)		

SPLASH ReMake ONLY

How to Record Non Material Issues

➤ Add Non Material SKU's

- Some may need to be Hidden from the Customer (not published on Customer Facing Reports – Invoice)
- Additional Mileage Charge to Customer (Revenue)
- Additional Internal Labor Costs (Fabrication, Installation, CLAIM) that needs to be recorded against the Issue

The screenshot displays the 'SKU Items' configuration page. On the left, the 'SKU Classes' table shows a class named 'ISSUE' with type 'Calc' and sort order '99'. Below it, the 'SKU Items' table lists three items: 'Fab Labor (HC)', 'Install Labor (HC)', and 'Programming Labor (HC)', all associated with the 'ISSUE' class and 'Each' unit. On the right, the 'CalcTypes' section shows '01 Retail SS 2401' as the selected type. The 'Cost Definitions for SKU Items and Categories' table lists the labor items with a unit revenue of \$0.00 and 'HiddenCust' checked for each. A red callout box points to the 'HiddenCust' column, stating: 'Primary Function is to capture additional Labor/Time costs related to ISSUE. Lines have to added to associated AREAS'.

Class	SKU	Category	UnitRevenue	Unit	HiddenCust	Pe
ISSUE	Fab Labor (HC)		\$0.00	Each	<input checked="" type="checkbox"/>	0.0
ISSUE	Install Labor (HC)		\$0.00	Each	<input checked="" type="checkbox"/>	0.0
ISSUE	Programming Labor (HC)		\$0.00	Each	<input checked="" type="checkbox"/>	0.0

How to Add Additional Costs/Rev to an Area

- I need to charge the Customer for the Issue
 - Add Non-Issue Type Line Items to the Area (trip charge)
 - Define the Revenue (Revenue will appear on Customer Facing Documents – Estimate/Confirmation/Invoice)

- I need to add additional costs for the Issue (typically Labor Related)
 - Add Issue Type SKU/Line Items to the Area
 - Define the Cost (typically will NOT appear on Customer Facing Documents)

- I need to Charge the Customer and Record a Cost for the Issue
 - Add Non-Issue Type SKU/Line Items to the Area
 - Define the Revenue & Cost (Revenue will appear on Customer Facing Documents – Estimate/Confirmation/Invoice)

Issue Type SKU/Line Item – typically Hidden from Customer (internal use only)

ISSUE SKU Return Trip Charge (Costs)

Select SKU Class for New Line Item: Template Splash

Show Optional Line Items

Class	SKU Name	Inv?	Override SKU Name	Append to SKU Name	Spl?	Issue?	Qty	Top Qty	Unit Cost	Override Unit Cost	Unit Revenue	Override Unit Revenue	Override Percentage	Extended Cost	Extended Revenue
> Quartzite 3cm	Red Mystery - 3cm	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	1.000	n/a	Slab	\$497.250	\$497.250	\$0.000	\$795.600	\$497.25	\$795.60
Edge Profile	3cm Eased	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	0.000	n/a	FLnFt	\$0.000		\$1.000		\$0.00	\$0.00
Fabrication	Fabrication Charge (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	29.250	n/a	SqFt	\$0.000		\$16.500		\$0.00	\$482.62
Install Labor	Install Charge (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	29.250	n/a	SqFt	\$0.000		\$10.750		\$0.00	\$314.44
ISSUE	Install Labor (HC)	<input type="checkbox"/>	Return Trip Charge		<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.000	n/a	Each	\$250.000	\$250.000	\$0.000		\$250.00	\$0.00
Metrics	TFI - Std (HC)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	29.250	n/a	SqFt	\$11.700		\$0.000		\$342.22	\$0.00

Area Summary

Revenue:	\$1,592.66
Pre-tax Rev:	\$1,592.66
Square Feet:	29.25
\$ Per SqFt:	\$54.45
Pre-tax Cost:	\$1,089.47
Margin:	\$503.19
Margin Pct:	31.59%

Description	Cost	Revenue
1.00 Slab - Quartzite 3cm: Red Mystery - 3cm	\$497.25	\$795.60
29.25 SqFt - Fabrication: Fabrication Charge (HC)	\$0.00	\$482.62
29.25 SqFt - Install Labor: Install Charge (HC)	\$0.00	\$314.44
1.00 Each - ISSUE: Return Trip Charge	\$250.00	\$0.00
29.25 SqFt - Metrics: TFI - Std (HC)	\$342.22	\$0.00

Show Optional Line Items

Override Percentage	Extended Cost	Extended Revenue
	\$497.25	\$795.60
	\$0.00	\$0.00
	\$0.00	\$482.62
	\$0.00	\$314.44
	\$250.00	\$0.00
	\$342.22	\$0.00

Area Summary

Revenue:	\$1,592.66
Pre-tax Rev:	\$1,592.66
Square Feet:	29.25
\$ Per SqFt:	\$54.45
Pre-tax Cost:	\$1,089.47
Margin:	\$503.19
Margin Pct:	31.59%

Description	Cost	Revenue
1.00 Slab - Quartzite 3cm: Red Mystery - 3cm	\$497.25	\$795.60
29.25 SqFt - Fabrication: Fabrication Charge (HC)	\$0.00	\$482.62
29.25 SqFt - Install Labor: Install Charge (HC)	\$0.00	\$314.44
1.00 Each - ISSUE: Return Trip Charge	\$250.00	\$0.00
29.25 SqFt - Metrics: TFI - Std (HC)	\$342.22	\$0.00

Issue Area Lines & Area Summary

Job Area Reports

- Job Site Details Report

- Internal Document that reflects all ReMake Area Lines

- Invoice

- Customer Facing Document that does NOT reflect ReMake Area Lines and/or Revenue\$\$

Job Site Details

Date: 2/6/2024

Customer: zzFabchoice Job: #7416-Primary Home
 Account: Fabricators Choice Test Acct: 651-259-1300
 Job Site: 9850 Hemingway Ave
 Cottage Grove, MN 55016
 Phone(s):

Job Details
 Notes:

Kitchen (#8242,0) 10.24 SqFt

Includes template and installation of countertops.
 --Tear out and plumbing not included unless requested or quoted--

10.24 SqFt - Granite 3cm: Black Pearl Antique - 3cm

10.24 SqFt - Granite 3cm: ReMake (Remake)

4.17 LnFt - Edge Profile: 3cm Eased

4.17 LnFt - Edge Profile: ReMake (Remake)

10.24 SqFt - Fabrication: Fabrication Charge (HC)

10.24 SqFt - Install Labor: Install Charge (HC)

10.24 SqFt - Metrics: TFI - Std (HC)

Fab Notes:

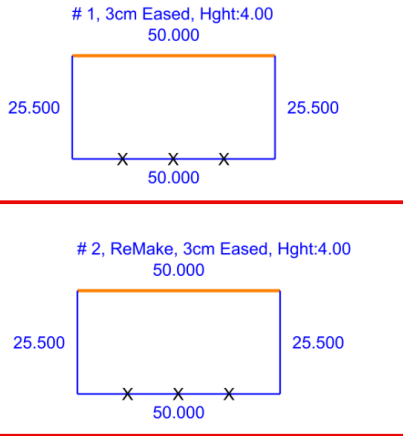
Tops:

Top#	Name	Length	Depth	Edge Finish	Edges (N=None, F=Finished, S-Splash)	Splash Count	Splash Height	Total Sq Ft	Fin. LnFt	Additional Line Items
1		50.00	25.50	3cm Eased	S,N,F,N	1	4.00	10.24	4.17	
2	ReMake	50.00	25.50	3cm Eased	S,N,F,N	1	4.00	10.24	4.17	
Total						2		20.48	8.34	

Inventory Items:

Item #	SKU Class	SKU	Custom Description	Length	Depth	VenderItemID	Location
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Kitchen (#8242,0)



Bill To: Fabricators Choice Test Acct
 9850 Hemingway Ave S
 Cottage Grove, MN 55016
 info@fabchoice.com

Invoice

Ship To: zzFabchoice
 9850 Hemingway Ave
 Cottage Grove, MN 55016

Phone: 651-259-1300

PO #:

Area#	Description	Amount
8242	Kitchen Granite 3cm, Black Pearl Antique - 3cm <i>Line Items:</i> Granite 3cm: Black Pearl Antique - 3cm Edge Profile: 3cm Eased	
8243	Kitchen Granite 3cm, Black Pearl Antique - 3cm <i>Line Items:</i> Granite 3cm: (Splash) Black Pearl Antique - 3cm Granite 3cm: Black Pearl Antique - 3cm Edge Profile: 3cm Eased Sink Prep: - Kitchen UM Sink Composite: Kitchen Karran QT-810-BI Double Bowl 50/50 - Bisque Faucets: S/O - Vanity Faucet Karran KBF442MB Kassel - Matte Black Misc: Delivery Fee (per mile)	\$1,826.17
9586	Kitchen Quartzite 3cm, Red Mystery - 3cm <i>Line Items:</i> Quartzite 3cm: Red Mystery - 3cm	\$1,592.66

ReMake does not appear on any customer facing documents

How to Add Job/Area ReMake/Issues to Report

- Remember an Issue Action is the only way to get anything on the Category and Issue Report
- Add ISSUE Action
- Click Done and system will open an Issue Collect Details Dialog Box
- Select a Category/Reason Code
- Select a User (Human or Machine)
- Missed Deadline
- Comments added manually
- Click OK (this closes the Dialog Box and “Done” the Action (this can be viewed via the HISTORY)

Job: #7416 Primary Home

Basic Info

Name: Primary Home

Status: Created

Type:

Contact:

Details

Actions

Collect Details

Issue category: Customer

Issue reason: Other Trades Caused Damage After Install

User responsible: XX-Customer

Missed target deadline?

Comment:
Tile Splash Installed caused a Chip on the CTop

OK Cancel

Action	Decision	Comment	Start	Urgnt	Completed	User	Status	Hrs	Sch	Link
Done	ISSUE Install Reason Code	na	Tue 2/6/24 9:38 P	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FabChoice		1.00		

Name	Qty	Status	CalcType
Kitchen	1	Created	01 Retail
Perimeter	1	Created	01 Retail
Kitchen	1	Created	04 Slab Price

Basic Info

Name: Primary Home

Status: Created

Type:

Contact: Bley, Roderick

Process: Home Depot

Contact Information

Persons

Assigned Roles

Area List:

+

1

+

+

+

+

Collect Details

Issue category: Fabrication

Issue reason: Piece Movement On CNC

User responsible: 04 ST CNC

Missed target deadline?

Comment:

Vacuum Pods did not stay in position

OK Cancel

Details

Actions



History

Void

View Voided

Action	Decision	Comment
Done ISSUE Fab ST - Reason Code	na	

How to Record an Issue Incident

- What is an Incident Issue
 - Not Material Related
 - No need to capture Additional Labor Costs
 - No Additional Revenue\$\$ to collect from Customer
 - Ability to Collect Data to record the Category/Reason Code/Who/Comments
- Incident Issue Examples
 - Service Call
 - Job is “closed” (installed/Invoiced/Paid) and just want to record the Incident
 - Ensures that Incident is recorded on the Report
 - Whatever you can come up with as an Incident

YOU MUST ADD AN ISSUE TYPE ACTION that permits Issue Collection Data

1 - Shop ReMake (Mat-Fab) Confirm RM Material

2 - Service - Billable Schedule Service

3 - Service - Warranty Schedule Service

4 - ReMake BTd (Mat-Fab-Install) ReMake BTd Job Approval

5 - ReMake Template (Mat-Fab-Install) ReMake Template Job Approval

6 - MOD BTd (Fab-Install) MOD BTd Approval

7 - MOD Template (Fab-Install) MOD Job Approval

8 - ReSchedule ReSchedule Fulfillment

* ISSUE General - Reason Code

CLAIM

If your process includes a CLAIM, Service Call, Callback Actions you can then manually add the ISSUE General Action (or any Actions that you have defined to Collect Issue Details)

The screenshot shows a mobile application interface with a sidebar on the left containing icons for a plus sign, refresh, chat, and a mobile phone, along with buttons for 'History', 'Void', and 'View Voided'. The main area displays a table with columns: Action, Decision, Comment, and Start. The first row has a 'Done' button in the Action column, 'ISSUE Fab ST - Reason Code' in the Decision column, and 'na' in the Comment column. The Start column shows 'Sun 2/4/24'. A red box highlights the 'Done' button, and a red arrow points to a 'Confirm Issue Resolution' dialog box. The dialog box text reads: 'No line items marked as "Issue" have been found for this job. It is not required, but you may want to create an "Issue" line item to track the cost for this issue. If you would like to continue without designating an "Issue" item, press "Okay"'. The dialog box has 'OK' and 'Cancel' buttons at the bottom right.

Add an Issue Action but do not Define a ReMake or Issue within any of the Job Areas...click **Done**....
Confirm Issue Resolution dialog box will inform you that there is no AREA with a Line item Issue....IF YOU CLICK OK it will open the Collect Details dialog box and you can simply record the Incident....without Costs/Revenue \$\$

FromDate: 1/1/2024

Account: Null

Category: Null

Show Job Details:

ThroughDate: 1/31/2024

User:

Show Only Missed Deadlines:

Issue Report of Incidents Only

Issues Category And Reason

From: 1/1/2024 Through: 1/31/2024

Report Totals			
Total Issues:	36	Total Missed Deadlines:	0
Total Affected Jobs:	31	Total Remake SqFt:	0.00
	<i>Revenue</i>	<i>Cost</i>	<i>Margin</i>
Material:	\$0.00	\$0.00	\$0.00
Non-Material:	\$0.00	\$0.00	\$0.00

Category Totals	
Sales:	1
Material:	4
Template:	5
Fabrication:	11
Customer:	9
Install:	5
CAD/Eng:	1
Supplier:	0
Purchasing:	0
Scheduling:	0

Category: Template

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Template - Wrong Overhang	1/19/2024	7563 - Primary Home1	<input type="checkbox"/>	0.00	Liberty-321 Gatewood		Robbie Mote	Small top between range and fridge is not wide enough. It is roughly 1/4" too small.
Template - Drawing - Wrong Sink/Sink Center	1/23/2024	7142 - Primary Home	<input type="checkbox"/>	0.00	M&M-300 S Thurnston			
Template - ZZ Misc - See Comments	1/26/2024	7733 - Kitchen / Waterfall Panels	<input type="checkbox"/>	0.00	Sharp-1523 Flint Hills			The island its 3/8 big need to cut it dow
Template - Drawing - Wrong Splash Details	1/29/2024	7647 - Primary Home	<input type="checkbox"/>	0.00	Mike Greenlee-117 10 W 1st St	Retail	Robbie Mote	splash too tall for outlets needs remade
Template - Did Not Template Sink/ Cooktop or Other Areas Listed	1/30/2024	7972 - Splash	<input type="checkbox"/>	0.00	Relph-5109 N Delaware		Robbie Mote	did not template for splash

Category: Customer

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Customer - ZZ Misc - See Comments	1/3/2024	5515 - Primary Home	<input type="checkbox"/>	0.00	Cook-7370 S 143rd E			sink holes were too large for customer supplied sinks. Program was not corrected, sinks may be a bad batch, asked Win supply for new delivery to see if they work.
Customer - ZZ Misc - See Comments	1/4/2024	7578 - Kitchen Phase	<input type="checkbox"/>	0.00	Buckert-5033 Emerald			c/o requested to not install one piece at time of install and we will go back to install when ready
Customer - ZZ Misc - See Comments	1/12/2024	7707 - Primary Home	<input type="checkbox"/>	0.00	Decks-11724 W Douglas			no supports at jobsite and no grill onsite for cut out
Customer - Cabinets not Set/Level	1/12/2024	7510 - Outdoor Kitchen	<input type="checkbox"/>	0.00	Brian Dickson-2001 159th Ct	Retail		outdoor kitchen not level
Customer - ZZ Misc - See Comments	1/16/2024	6901 - Primary Home	<input type="checkbox"/>	0.00	Sharp-2416 Doris			no supports for upper bar at time of install. Will install when we go back for waterfall panels
Customer - ZZ Misc - See Comments	1/17/2024	7757 - Primary Home	<input type="checkbox"/>	0.00	RJ Castle-5852 N St Paul			masteer bath outlet needs moved down for backsplash to work
Customer - Cabinets not Set/Level	1/23/2024	7809 - (67204)1	<input type="checkbox"/>	0.00	Sharp-5472/5 474 Sandkey Ct			Trim carpenter moved cabinets after install.
Customer - Cabinets not Set/Level	1/23/2024	7809 - (67204)1	<input type="checkbox"/>	0.00	Sharp-5472/5 474 Sandkey Ct			Trim carpenter moved cabinets after install.

Things to Consider

- ReMake Issue - Existing Job or New Job
 - Job Status
 - Installed = New Job
 - Partially Installed or earlier status = Existing Job
- ReMake Issue - New Area or Existing Area
 - Area Status
 - Isolate RM or Issue Area
 - Duplicate Top(s) that are designated as ReMake
 - Move to New Area
 - Proceed with ReMake procedures
- How will it impact Schedule Calendar SF/T\$
 - Material will ALWAYS impact T\$ as it is an Additional Cost to the Job
- Incident Issue
 - Can be added regardless of job status as you are not impacting SF/Cost/Rev\$\$

Customer Feedback

I just reviewed my 1st month end report for job issues in Jan 2024.

I wanted to let you know how fantastic this report turned out. This is extremely easy, useful and everything anyone would need to see.

I know you worked extremely hard on this feature. Please pass along to AF programmers as well. In my opinion, this is a huge win and advantage for ActionFlow.

Closing Comments

Capture Issues
as needed in
your Company.
This
presentation is
to stimulate

you to move
forward....

Thank You

Thank you for your time this morning to join me in presenting the ActionFlow Issue Process

If you have any questions, please contact your
ActionFlow Account Representative
for details on how to use the Issue Process

The combinations of how to capture ISSUES is endless once you
understand the combinations of the
Issue Actions/Issue SKU's/Issue Category and Reason Codes