ActionFlow®

ISSUES TRACKING GUIDE

ActionFlow can help you track, monitor, and view issue (callbacks, claims, and remakes) activity in your shop.

To accurately track and address the impact of issues, ActionFlow can capture the frequency, reason, and associated cost.

Callbacks/Remakes/Claims

The cost and revenue associated with the issue is captured in the area module.

Area Module

⬇️

Cost

Job Processes

⬇️

Frequency & Reason

The reason and frequency for issues is captured using the job process.

Issues by Category And Reason

From: 9/1/2023   Through: 10/16/2023

Report Totals

Total Issues:	15	Total Missed Deadlines:	2
Total Affected Jobs:	4	Total Remake SqFt:	121.93

	Revenue	Cost	Margin
Material:	$80.00	$846.64	($766.64)
Non-Material:	$101.00	$211.07	($110.07)

Category Totals

Sales: 0		Material: 0
Template: 0		Fabrication: 3
Customer: 0		Install: 2
CAD/Eng: 5		Supplier: 0
Purchasing: 1		Scheduling: 0

Category: Install

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Install - Faucet/Vessel Sink Hold Drilled Incorrectly	9/4/2023	3064 - Primary Home	☐	37.22	Aaron A.		Adam	

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue
5097	Kitchen	Remake	Edge	Non-Material	$39.75	$0.00
5097	Kitchen	Delta 1234	Faucet	Material	$120.00	$40.00
5097	Kitchen	Trip Charge	Misc	Non-Material	$1.00	$100.00
5097	Kitchen	Remake	Granite 3cm	Material	$155.80	$0.00

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Install - Broke during install	9/29/2023	3403 - Fabrication Fail	☐	76.38	zzCallbacks	ABC Kitchen & Bath		

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue
5704	KitchenFabFail	Remake	Edge	Non-Material	$70.32	$0.00
5704	KitchenFabFail	Delta 1234	Faucet	Material	$120.00	$40.00
5704	KitchenFabFail	Trip Charge	Misc	Non-Material	$100.00	$1.00
5704	KitchenFabFail	Remake	Granite 3cm	Material	$319.64	$0.00

Category: Purchasing

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Purchasing - Wrong PO	9/14/2023	3404 - Install Fail	☐		zzCallbacks	ABC Kitchen & Bath	Alisha	

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue

Category: Fabrication

AF users can easily generate a report that will give them a comprehensive view into their callback/claim/remake activity.

GETTING STARTED

Tracking issues (callbacks, claims, remakes) begins when a shop user, installer, or project manager indicates that a problem occurred during the process.

For example, there is an "Install" action in this process.

If the installer completes the "Install" action with a "Reinstall" decision, this creates a "Schedule Reinstall" action assigned to the scheduler

AND

a "Reinstall Reason" action that is assigned to the project manager.

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When the project manager (or similar role) is assigned an issue action like, "Fabrication Problem" or "Reinstall Reason" action, there are 2 steps to take.
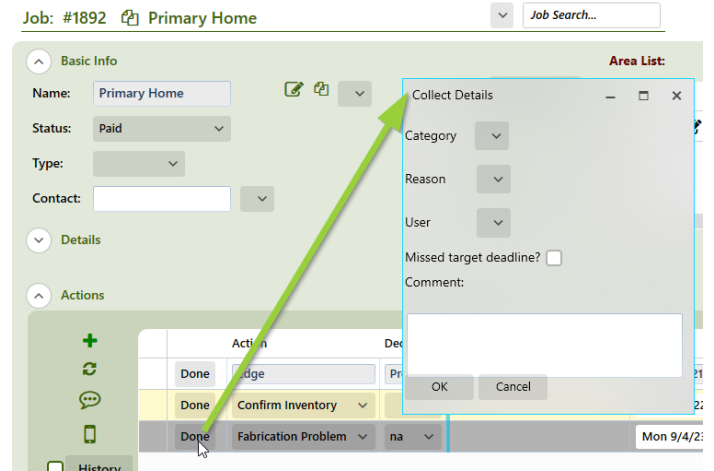
1. Capture the cost in the area module.
2. Capture the reason in the job process by completing the action and filling out the issue reason window.

The project manager can follow the guide below. We recommend scheduling a training call with your account manager to review these steps.

CAPTURING COST

The first step is to capture the cost and revenue associated with the issue in the Area Module.

1. AREA MODULE

1. Edit the area where the issue occurred.
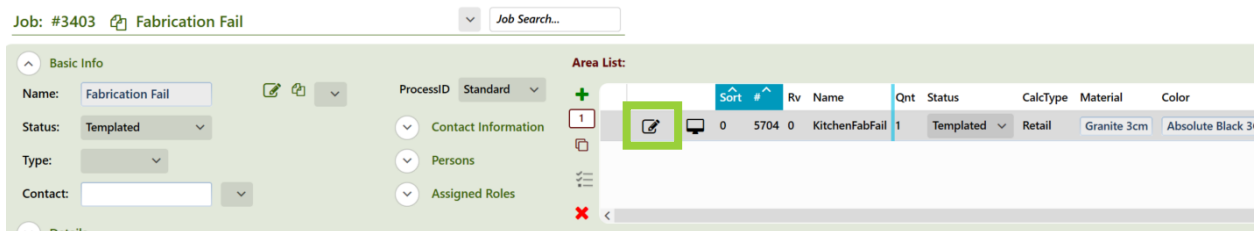
DOES A TOP NEED TO BE REMADE?

YES   NO

DOES A TOP NEED TO BE REMADE?

YES

NO

1. Find the impacted top.
2. Duplicate the top and designate it as a "Remake" by scrolling to the right in the Top List Grid and checking the "Remake" box.
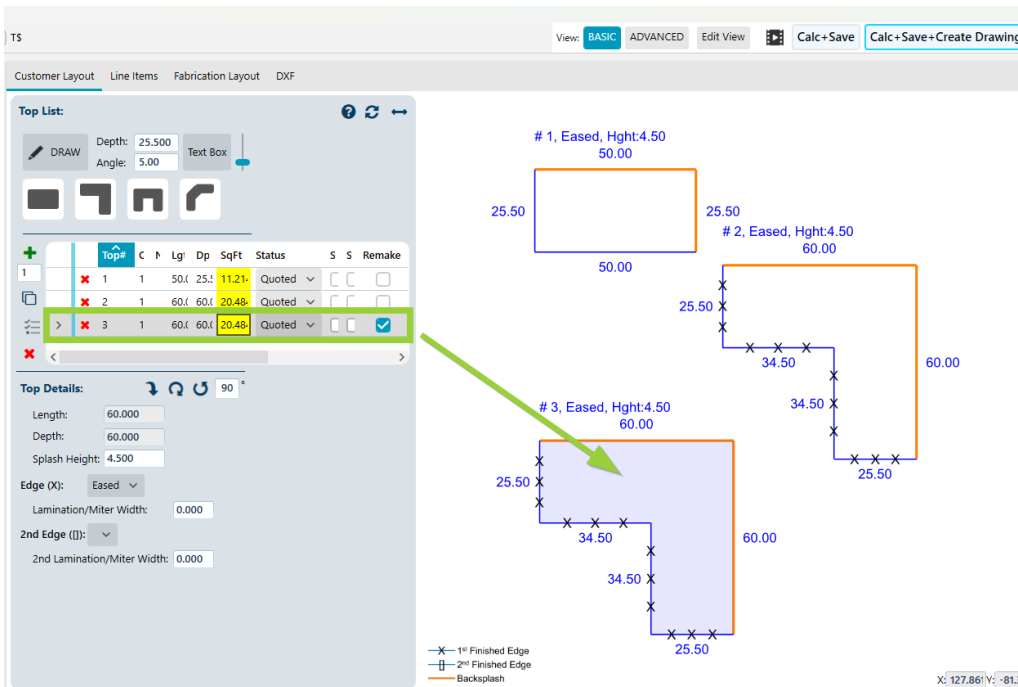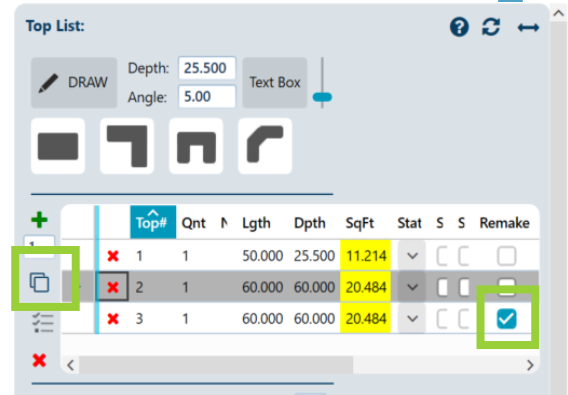
Once the remake checkbox has been marked, any labor or material line item associated with this top will automatically be tracked with indicators: "remake" and "issue"

The "Issue?" checkbox in the "Line Items" tab is automatically marked for any line items associated with the remade top.

The remade cost and revenue are calculated and tracked.

In the line items of the "Area Summary," the SqFt and Edge of that top are indicated with "Remake."

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YES   NO

ENSURE THE ACCURACY OF INVENTORY ITEMS

If you remake a top that has inventory items attached, you may need to adjust the inventory items.

For example, this top had a farm sink attached and it is unlikely another farm sink is needed as part of the remake.

Be sure to "Calc & Save"

Remove any duplicated inventory items that aren't needed for the remake

If you have non-serialized inventory, set the correct NS quantity

Uncheck "Show Slabs Only"

If you dont have non-serialized inventory, remove the additional sink item

DOES A TOP NEED TO BE REMADE?

NO

If the reason for an issue does not require a duplicate top, add a new line item and check the "Issue?" column.

In this example, a new faucet and an additional trip charge were needed for the job.

The "Delta 1234" faucet line item and "Misc – Trip charge" line item are both marked as "issue" line items.

The fabricator and customer determined that the customer would be charged for the additional trip.

So, the fabricator overrode revenue value to account for additional cost.

![ActionFlow logo]

ENSURE THE ACCURACY OF COST AND REVENUE AMOUNTS FOR ISSUE LINE ITEMS

You may need to override the cost for issue line items.

In this example, the additional Trip Charge associated with this issue cost the fabricator $200.

In cases where the issue is the fault of the fabricator, you will likely need to make sure the customer isn't charged by overriding revenue to 0 for issue line items.

This is done automatically for the material and edge in the case of "remakes."

SOO...HOW DO I USE THIS INFORMATION?

1. Use Issue reports to monitor the cost and revenue associated with callbacks, claims, and remakes.

2. Subsequent invoices provided to the customer include additional line items if you charged for them (ie. faucet or trip charge) but they will not see the additional costs.

The "Issue Category and Reason" report tracks the cost and revenue associated with issues.

Check "Show Job Details" to see how the cost and revenue totals break down.

The "Report Totals" section shows the revenue, cost, and margin for material and non-material line items.

The "material" costs come from the faucet and the granite that had to be remade.

The "non-material" costs come from the additional trip and the labor on the edging for the piece that had to be remade.

In this case, the shop decided to charge the customer for the additional faucet and trip charge so there is revenue.

TRACKING REASON & FREQUENCY

When the project manager is assigned an issue action like, "Fabrication Problem" or "Reinstall Reason" action, there are 2 steps to take.

1. Capture the cost in the area module.
2. Capture the reason in the job process by completing the action and filling out the issue reason window.

2. JOB PROCESS

1. Complete the issue action by clicking "Done".

Some clients have set up an unregistered user for this field. Talk to your account manager

In this example, the decision on the "Install" action was "Reinstall" which created the "Schedule Reinstall" and "Reinstall Reason" actions.
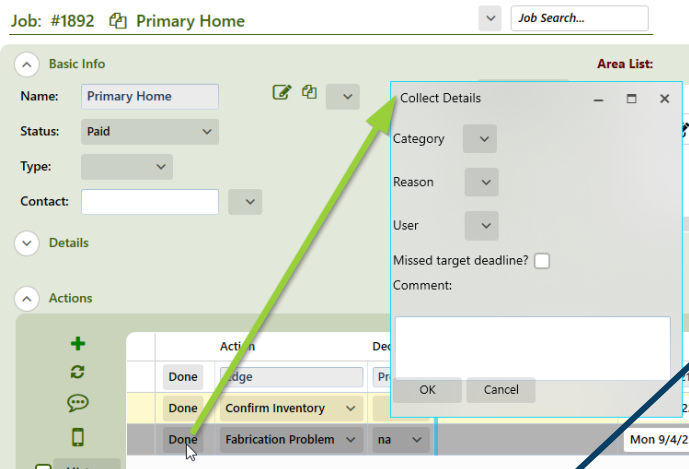
2. Fill out the pop-up fields:
   - Category (ie. template, sales, purchasing etc.)
   - Reason
   - User
   - Whether a deadline was missed
   - Comment

Note: For this to work, you need to have completed the setup process with your account manager so that ActionFlow knows when to ask for an issue reason.

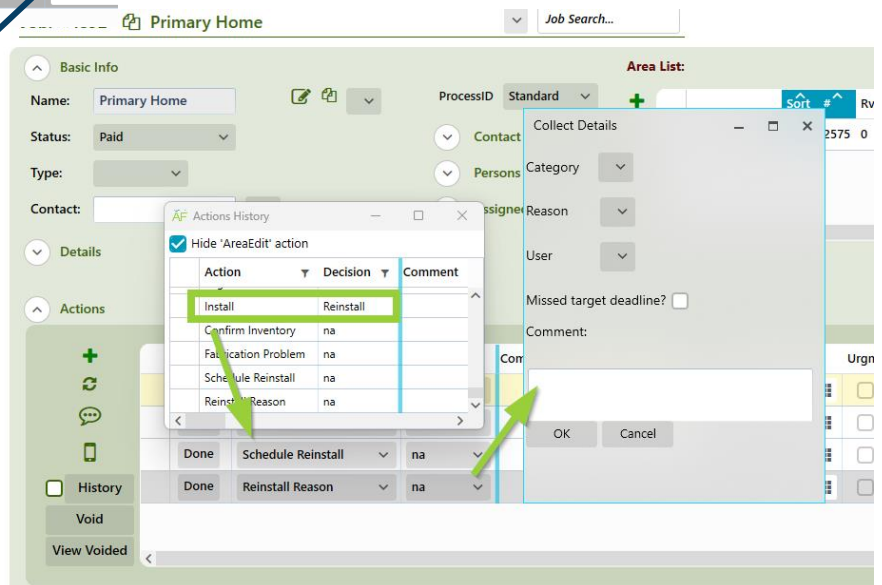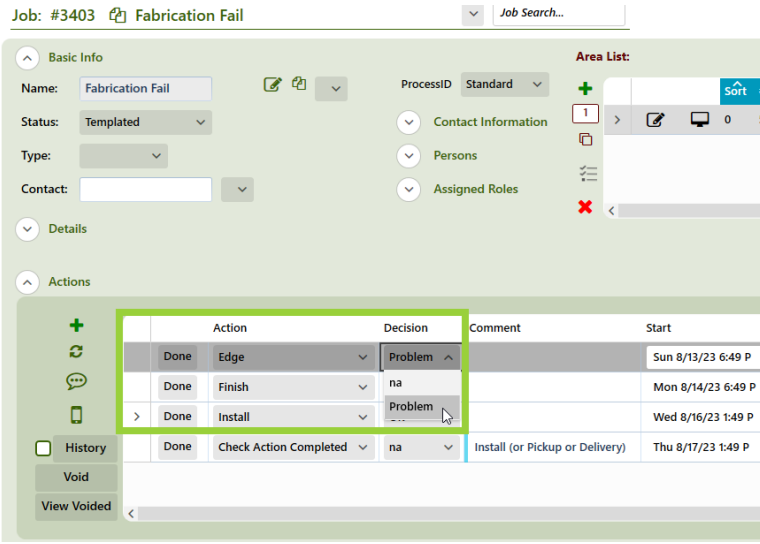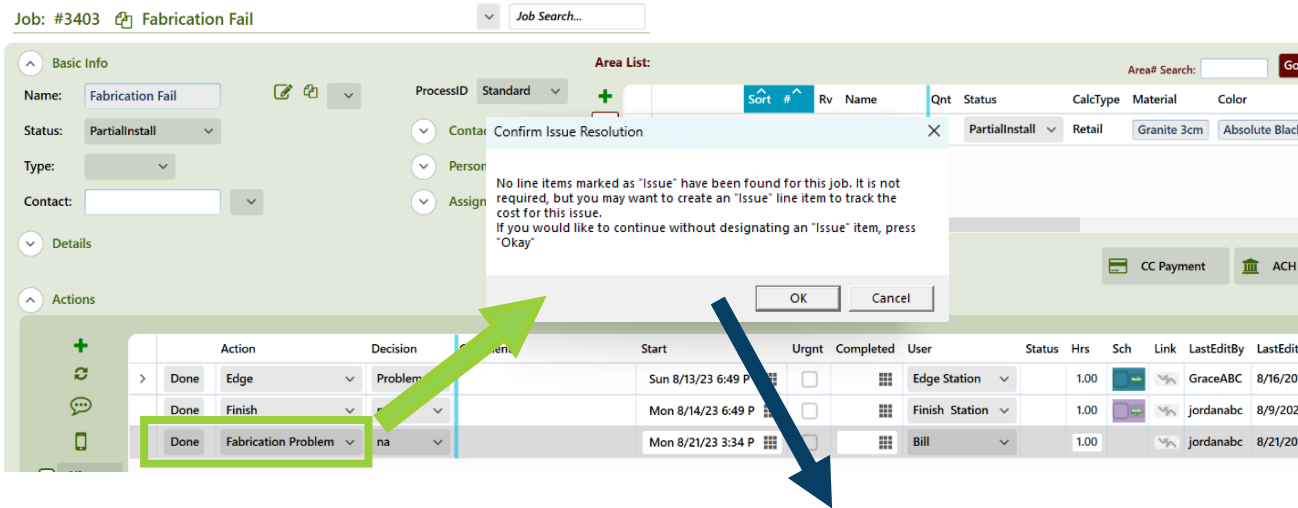In some cases, the project manager may first need to complete another action like "Edge" or "Install" and select the decision you set up to indicate a problem.

The project manager completes the "Edge" action by selecting the "Problem" decision and clicking "Done."
This step will create the "Fabrication Problem" action.

If the project manager did not designate at least one line item as a "issue" in the Area Module, there will be a pop-up reminder to visit the Area module and adjust the line items so that ActionFlow can accurately track the cost.

Confirm Issue Resolution

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"

OK   Cancel
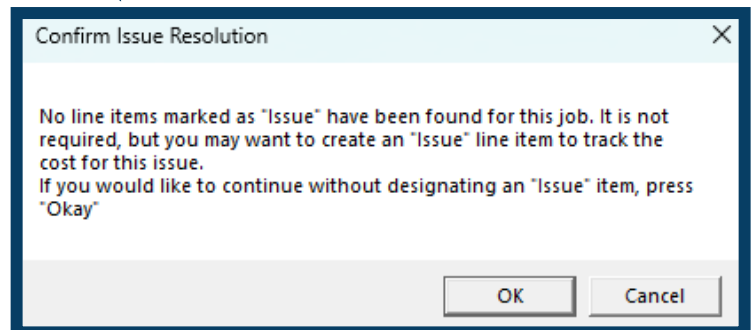
ISSUE REPORTING – FREQUENCY AND REASON

The "Issues Category and Reason" report tracks the number of issues and the reasons they occurred.

Report Totals

Total Issues:	15	Total Missed Deadlines:	2
Total Affected Jobs:	4	Total Remake SqFt:	121.93

	Revenue	Cost	Margin
Material:	$80.00	$846.64	($766.64)
Non-Material:	$101.00	$211.07	($110.07)

Category Totals

Sales:	0	Material:	0
Template:	0	Fabrication:	3
Customer:	0	Install:	2
CAD/Eng:	5	Supplier:	0
Purchasing:	1	Scheduling:	0

The "Report Totals" section shows the # of :
- Total Issues
- Total Affected Jobs
- Total Missed Deadlines
- Total Remake SqFt

The "Category Totals" section shows at which point in the process the problem occurred.

Customer   Account   Scheduler   Inventory   Vendor   Fabrication   Fab Scheduler   GridView

Report: **Issues by Category And R**

FromDate: 9/1/2023

Account:

Category:

Show Job Details: ☐

Issues by Category And Reason

From:9/1/2023   Through:10/16/2023

Report Totals

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	Revenue	Cost	Margin
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Category Totals

Sales:	0	Material:	0
Template:	0	Fabrication:	3
Customer:	0	Install:	2
CAD/Eng:	5	Supplier:	0
Purchasing:	1	Scheduling:	0

Category: Install

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:

Category: Fabrication

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Fabrication - Broke a piece	9/19/2023	3380 - Primary Home	☑	8.33	Alisha Tanksley	ABC Kitchen & Bath	Bill	
Fabrication - Broke a piece	9/29/2023	3403 - Fabrication Fail	☐	76.38	zzCallbacks	ABC Kitchen & Bath		
Fabrication - Bad fix in shop	10/6/2023	3403 - Fabrication Fail	☐	76.38	zzCallbacks	ABC Kitchen & Bath	Adam	

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Fabrication - Bad fix in shop	10/6/2023	3403 - Fabrication Fail	☐	76.38	zzCallbacks	ABC Kitchen & Bath	Adam

The bottom section of the report, breaks down the affected jobs into their categories with key details as to what went wrong.

Check "Show Only Missed Deadlines" to see jobs that caused a deadline to be missed.

As a reminder, the project manager can indicate a deadline was missed when filling out the popup during the process.

If the project manager did not provide a category or reason for the problem, those will be blank on the report.

SETUP

START

1. Identify 2-3 steps in your process where issues tend to occur.
2. Work with your account manager to find the exact action in your process when those problems would occur.
3. Work with your account manager to determine if there is an existing decision attached to that action that could be used to capture issue data.
4. Identify the reasons the issues occur that you would like to track. (hint: we provide a list of categories and reasons that can help you get started)

In this example, we want to track problems that happen when a "Template" required a "Reschedule" decision.
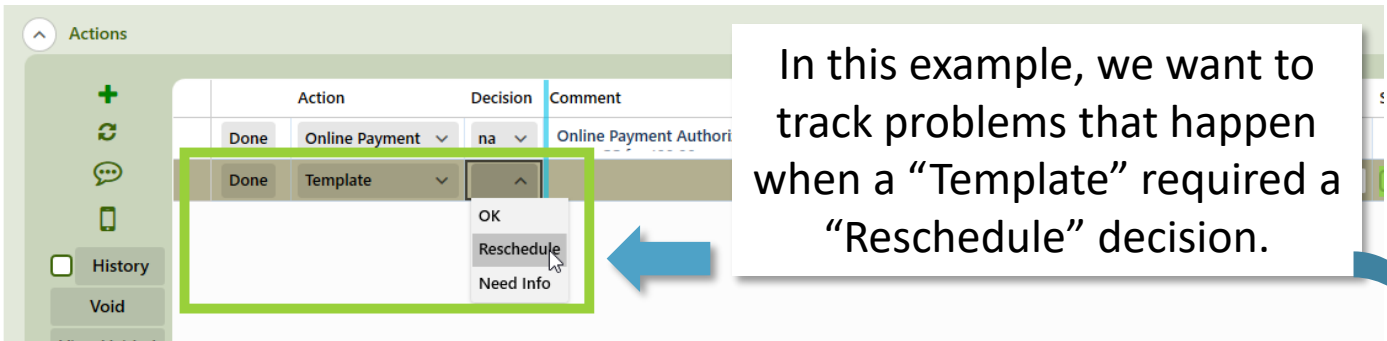
Action when Issue Occurs	Decision	Reasons
Template	Reschedule	Wrong overhang, Template/Drawing do not match, etc.
Saw	Doesn't exist	Cut wrong material, did not cut backsplash, etc.

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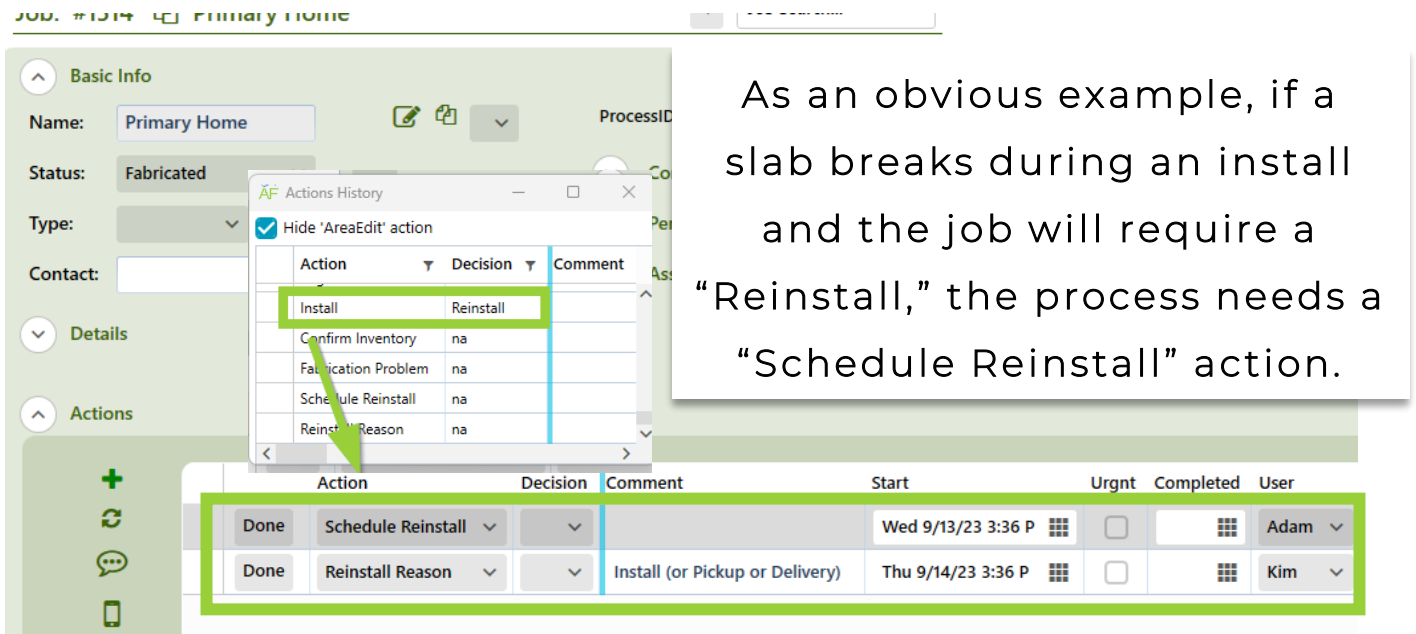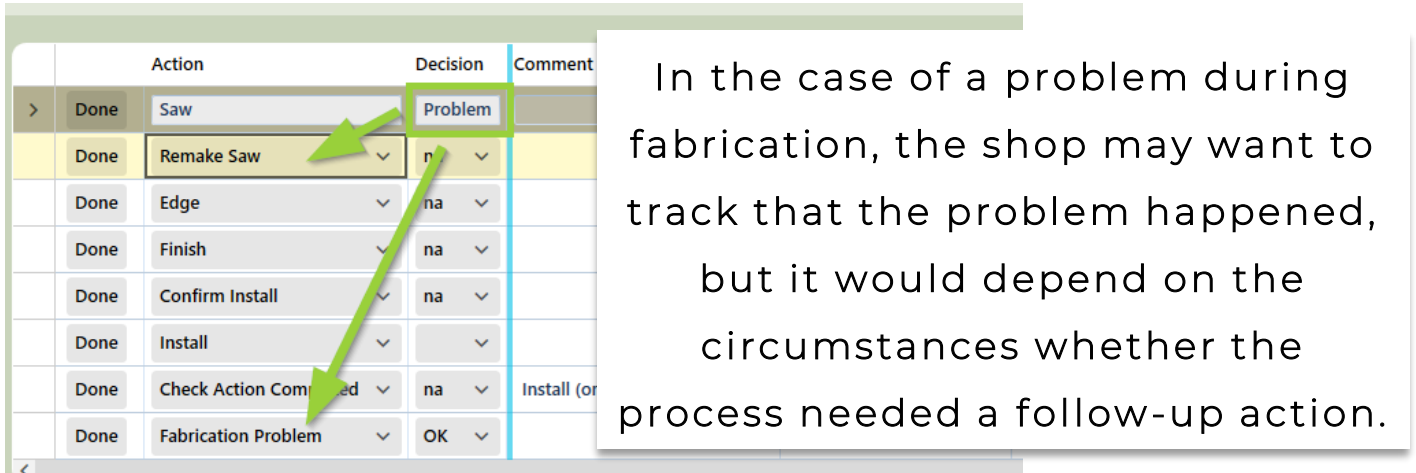
DO YOU NEED TO UPDATE THE JOB PROCESS?

It is necessary to have follow-up actions because of some issues.

As an obvious example, if a slab breaks during an install and the job will require a "Reinstall," the process needs a "Schedule Reinstall" action.

In the case of a problem during fabrication, the shop may want to track that the problem happened, but it would depend on the circumstances whether the process needed a follow-up action.

In some cases, an additional "Saw" action may be need to be scheduled, in other cases, it may not be necessary to run the job through the saw again.

If you are part of the setup process for "Issue Tracking," discuss with your account manager which issues may require changes to your process.