

# 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

**Area  
Module**

**Job  
Processes**

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

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

**Cost**

**Frequency &  
Reason**

### 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	<input type="checkbox"/>	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	<input type="checkbox"/>	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	<input type="checkbox"/>		zzCallbacks	ABC Kitchen & Bath	Alisha	

Area Num	Area Name	SKU Name	SKU Class	Item Classification	Cost	Revenue
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AF users can easily generate a report that will give them a comprehensive view into their callback/claim/remake activity.

# TRACKING ISSUES

## 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.

Job: #1514 Primary Home

Basic Info

Name: Primary Home ProcessID: Standard

Status: Fabricated

Type: Contact: Contact Information

Assigned Roles

Details

Actions

Action	Decision	Comment
Done Install	^	
Done Check Action Completed	OK	
	Reschedule	
	2 Step	
	Reinstall	
	OK - Not complete	
	Remake	

Job: #1514 Primary Home

Basic Info

Name: Primary Home ProcessID: Standard

Status: Fabricated

Type: Contact: Contact Information

Assigned Roles

Area List:

Sort	#	Rv	Name	Qty	St
1	0	2169	0	Kitchen	1

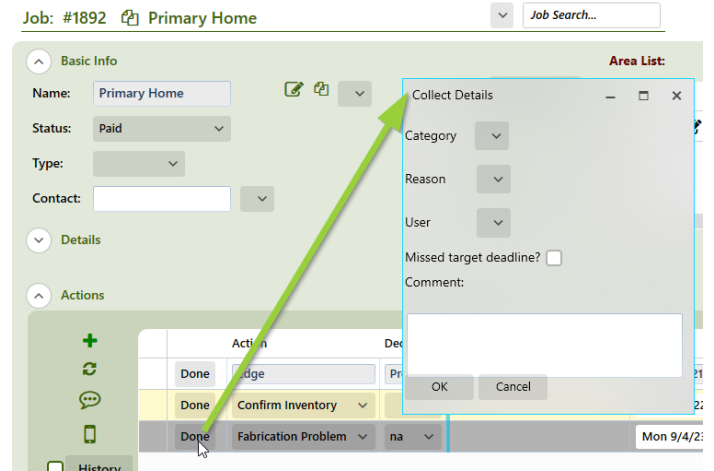
Actions History

Hide 'AreaEdit' action

Action	Decision	Comment
Install	Reinstall	
Confirm Inventory	na	
Fabrication Problem	na	
Schedule Reinstall	na	
Reinstall Reason	na	

Action	Decision	Comment	Start	Urgnt	Completed	User
Done Schedule Reinstall			Wed 9/13/23 3:36 P			Adam
Done Reinstall Reason		Install (or Pickup or Delivery)	Thu 9/14/23 3:36 P			Kim

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.

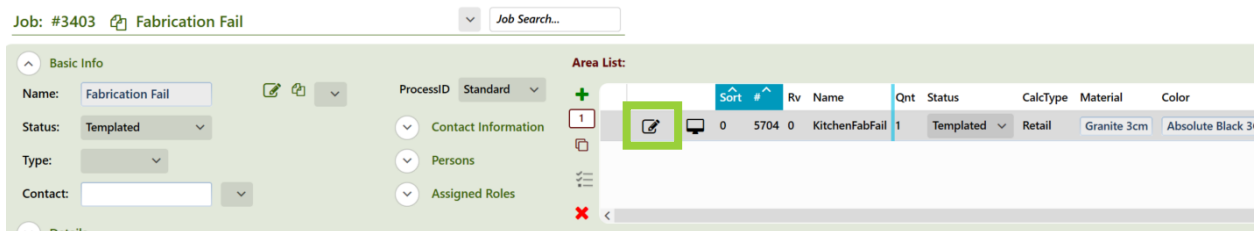
The project manager can follow the guide below. We recommend scheduling a training call with your account manager to review these steps.

## 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**

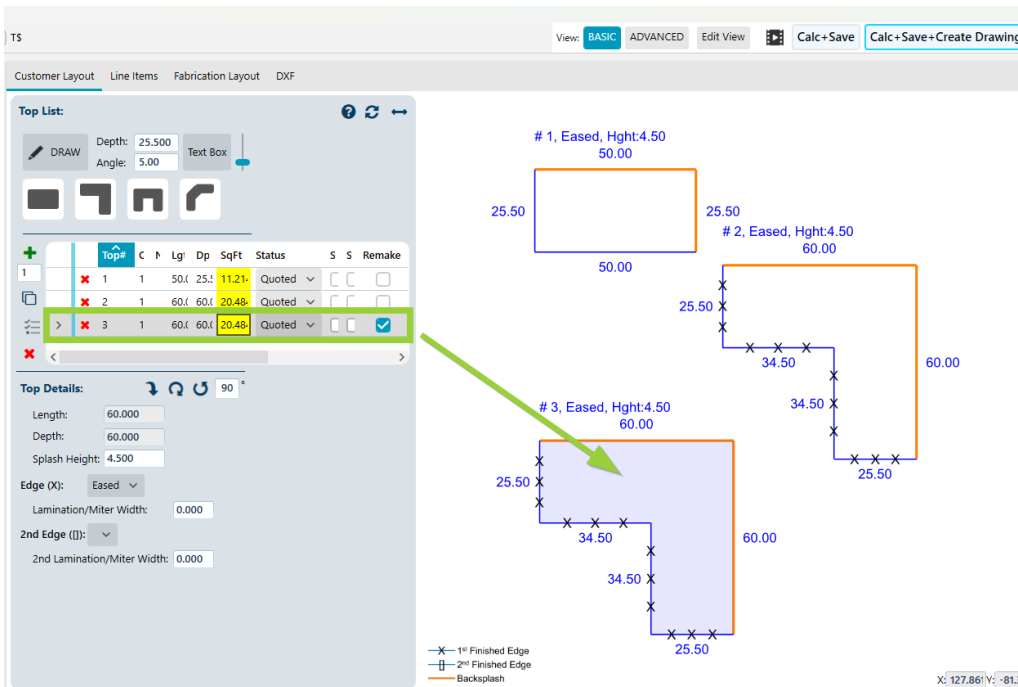
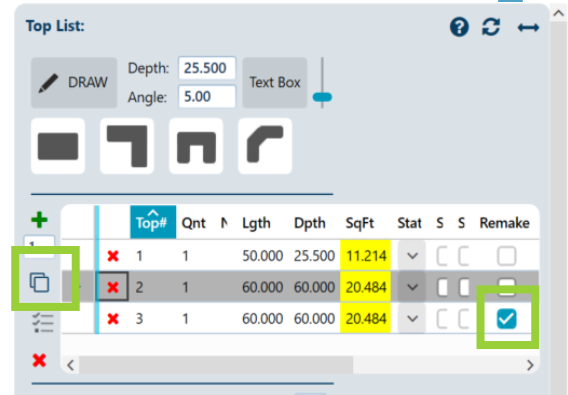
**NO**

# DOES A TOP NEED TO BE REMADE?

**YES**

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.

**NO**



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"



YES

# DOES A TOP NEED TO BE REMADE?

NO

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

ost  TS View: BASIC ADVANCED Edit View

Customer Layout Line Items Fabrication Layout DXF

Select SKU Class for New Line Item: Lineal Material  Show Optional Line Item

Class	SKU Name	Inv?	Override SKU Name	Issue?	Qnt	Unit	Unit Cost	Unit Revenue	Override Unit Revenue	Extended Cost	Extended Revenue
Granite 3cm	Absolute Black 3CM	<input checked="" type="checkbox"/>		<input type="checkbox"/>	29.020	n/a SqFt	\$8.372	\$46.000		\$242.96	\$1,334.92
Granite 3cm	Absolute Black 3CM	<input checked="" type="checkbox"/>	Remake	<input checked="" type="checkbox"/>	18.610	1 SqFt	\$8.372	\$46.000		\$155.80	\$0.00
Edge	Eased	<input type="checkbox"/>		<input type="checkbox"/>	23.420	n/a FLnFt	\$2.650	\$0.000		\$62.06	\$0.00
Edge	Eased	<input type="checkbox"/>	Remake	<input checked="" type="checkbox"/>	15.000	1 FLnFt	\$2.650	\$0.000		\$39.75	\$0.00
Faucet	Delta 1234	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	1.000	n/a Each	\$120.000	\$40.000		\$120.00	\$40.00
Labor	Labor on SqFt Calcs Only	<input type="checkbox"/>		<input type="checkbox"/>	29.020	n/a SqFt	\$0.000	\$18.000		\$0.00	\$522.36
Labor	Template Charge	<input type="checkbox"/>		<input type="checkbox"/>	1.000	n/a Each	\$250.000	\$150.000		\$250.00	\$150.00
Misc	Misc	<input type="checkbox"/>	Trip Charge	<input checked="" type="checkbox"/>	1.000	n/a Each	\$1.000	\$1.000	\$100.000	\$1.00	\$100.00

The remade cost and revenue are calculated and tracked.

TS View: BASIC ADVANCED Edit View Calc+Save Calc+Save+Create Drawing Undo Job: 3064-Aspen A, Primary Hom

Customer Layout Line Items Fabrication Layout DXF

**Top List:**

DRAW Depth: 25.500 Angle: 5.00 Text Box

1  Step2  Remake  Separate

**Top Details:**

Length: 60.000 Depth: 60.000 Splash Height: 4.500 Edge (X): Eased Lamination/Miter Width: 0.000 2nd Edge (I):

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

**Area Summary**

Revenue:	\$2,147.28
Pre-tax Rev:	\$2,147.28
Square Feet:	29.02
\$ Per SqFt:	\$73.99
Pre-tax Cost:	\$621.57
Margin:	\$1,525.71
Margin %:	71.05%
Flow Point:	1.02

Description	Cost	Revenue
29.02 SqFt - Granite 3cm: Absolute Black	\$242.96	\$1,334.92
18.61 SqFt - Granite 3cm: Remake	\$155.80	\$0.00
15.00 LnFt - Edge: Remake	\$39.75	\$0.00
1.00 Each - Faucet: Delta 1234	\$120.00	\$40.00
29.02 SqFt - Labor: Labor on SqFt Calcs Only	\$0.00	\$522.36
1.00 Each - Labor: Template Charge	\$0.00	\$150.00
1.00 Each - Misc: Trip Charge	\$1.00	\$100.00

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.

The screenshot shows a top layout with three sinks (#1, #2, #3) and an inventory items table. The table has the following data:

Item#	SKU Class	SKU	Custom Desc.	NSQnt	Vendor	Length	Depth	SqFt	Slabs Per SqFt	Cost	Revenue	Location	Multitem#	Used Length
1	Sink	Farm Sink		2.00						\$0.00	\$0.00			

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 don't have non-serialized inventory, remove the additional sink item

The screenshot shows a line items table with the following data:

Opt?	Excl?	Top#	Class	SKU Name	Inv?	Override SKU Name	Append to SKU Name	Spl?	Issue?	Qnt	Top Qnt	Unit	Unit Cost	Override Unit Cost
X		3	Cambria 3CM	Aragon 3cm	✓					36.100	n/a	SqFt	\$40.000	
X		3	Cambria 3CM	Aragon 3cm	✓	Remake				15.620	1	SqFt	\$40.000	
X		3	Edge	Eased	✓	Remake				20.500	n/a	FLnFt	\$2.650	
X		3	Edge	Eased	✓	Remake				10.500	1	FLnFt	\$2.650	
X		1	Cutout	Undermount	✓					1.000	1	Each	\$44.000	
X		1	Cutout	Undermount	✓					1.000	1	Each	\$44.000	
X		1	Cutout	Undermount	✓					36.100	n/a	SqFt	\$0.000	
X		1	Cutout	Undermount	✓					1.000	n/a	Each	\$250.000	
X		1	Cutout	Undermount	✓					1.000	n/a	Each	\$200.000	\$200.000
X		3	Sink	Farm Sink	✓					1.000	1	Each	\$0.000	
X		1	Faucet Layout	1 Hole Left	✓					1.000	1	Each	\$0.000	
X		3	Faucet Layout	1 Hole Left	✓					1.000	1	Each	\$0.000	

The inventory items table at the bottom shows:

Item#	SKU Class	SKU	Custom Desc.	NSQnt	Vendor	Length	Depth	SqFt	Slabs Per SqFt	Cost	Revenue	Location	Multitem#	Used Length
1	Sink	Farm Sink		1.00						\$0.00	\$0.00			

# 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.

SKU Name	Inv?	Override	Issue?	Qty	Unit	Unit Cost	Unit Revenue	Override Unit Revenue	Extended Cost	Extended Revenue
3cm Absolute Black 3CM				29.020	n/a SqFt	\$8.372	\$46.000		\$242.96	\$1,334.92
3cm Absolute Black 3CM		Remake		18.610	1 SqFt	\$8.372	\$46.000		\$155.80	\$0.00
Eased				23.420	n/a FLnFt	\$2.650	\$0.000		\$62.06	\$0.00
Facerd		Remake		15.000	1 FLnFt	\$2.650	\$0.000		\$39.75	\$0.00
Delta 1234			<input checked="" type="checkbox"/>	1.000	n/a Each	\$120.000	\$40.000		\$120.00	\$40.00
Labor on SqFt Calcs Only				29.020	n/a SqFt	\$0.000	\$18.000		\$0.00	\$522.36
Template Charge				1.000	n/a Each	\$250.000	\$150.000		\$250.00	\$150.00
Misc		Trip Charge	<input checked="" type="checkbox"/>	1.000	n/a Each	\$1.000	\$1.000	\$100.000	\$1.00	\$100.00

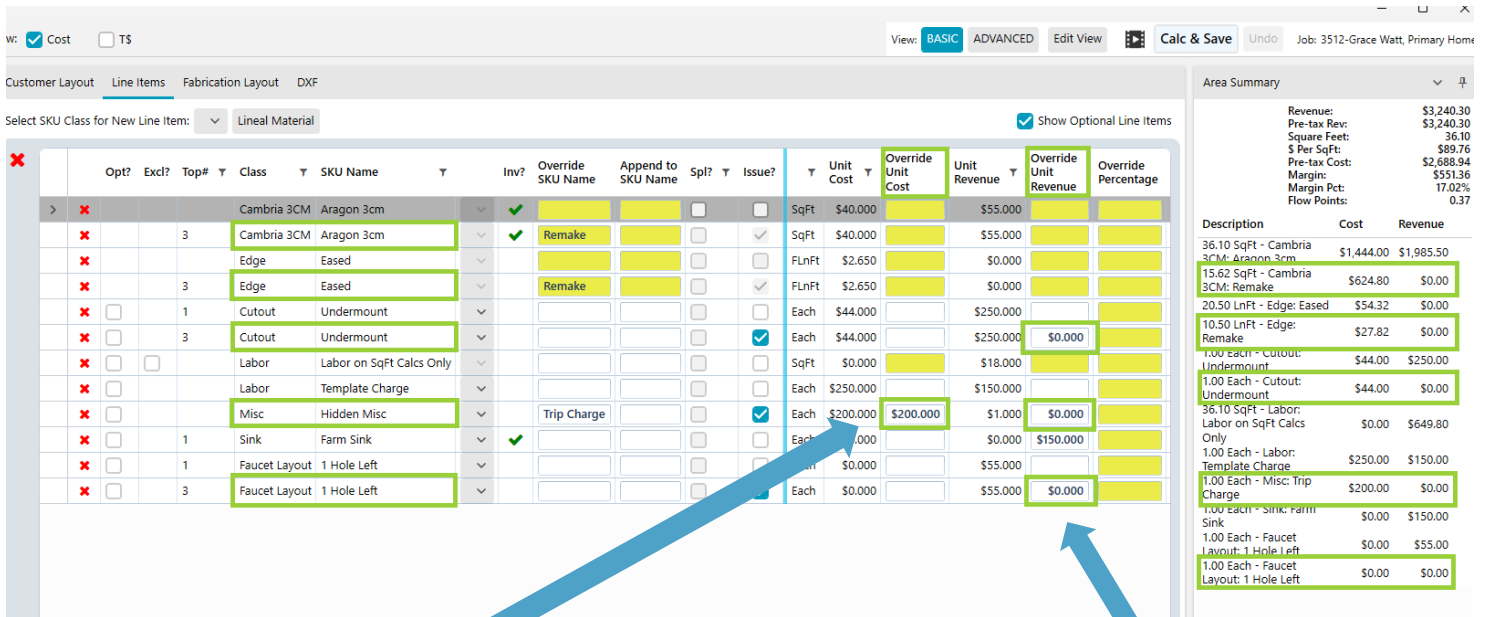
  

Description	Cost	Revenue
29.02 SqFt - Granite		
3cm: Absolute Black 3CM	\$242.96	\$1,334.92
18.61 SqFt - Granite 3cm: Remake	\$155.80	\$0.00
23.42 LnFt - Edge: Eased	\$62.06	\$0.00
15.00 LnFt - Edge: Remake	\$39.75	\$0.00
1.00 Each - Faucet: Delta 1234	\$120.00	\$40.00
29.02 SqFt - Labor: Labor on SqFt Calcs Only	\$0.00	\$522.36
1.00 Each - Labor: Template Charge	\$250.00	\$150.00
1.00 Each - Misc: Trip Charge	\$1.00	\$100.00

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.

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



Opt?	Excl?	Top#	Class	SKU Name	Inv?	Override SKU Name	Append to SKU Name	Spl?	Issue?	Unit Cost	Override Unit Cost	Unit Revenue	Override Unit Revenue	Override Percentage
>			Cambria 3CM	Aragon 3cm	✓					SqFt	\$40.000		\$55.000	
×		3	Cambria 3CM	Aragon 3cm	✓	Remake				SqFt	\$40.000		\$55.000	
×			Edge	Eased						FLnFt	\$2.650	\$0.000		
×		3	Edge	Eased		Remake				FLnFt	\$2.650	\$0.000		
×		1	Cutout	Undermount						Each	\$44.000	\$250.000		
×		3	Cutout	Undermount						Each	\$44.000	\$250.000	\$0.000	
×			Labor	Labor on SqFt Calcs Only						SqFt	\$0.000	\$18.000		
×			Labor	Template Charge						Each	\$250.000	\$150.000		
×			Misc	Hidden Misc		Trip Charge				Each	\$200.000	\$1.000	\$0.000	
×		1	Sink	Farm Sink	✓					Each	\$0.000	\$0.000	\$150.000	
×		1	Faucet Layout	1 Hole Left						Each	\$0.000	\$55.000		
×		3	Faucet Layout	1 Hole Left						Each	\$0.000	\$55.000	\$0.000	

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.



# ISSUE REPORTING - COST

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

**Report: Issues by Category And Reason**

FromDate: 9/1/2023  
 Account: [Null]  
 Category: [Null]  
 Show Job Details:

**Report Totals**

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

**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	<input type="checkbox"/>	37.22	Aaron A.		Adam	

**Report Totals**

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

**Category Totals**

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

**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.

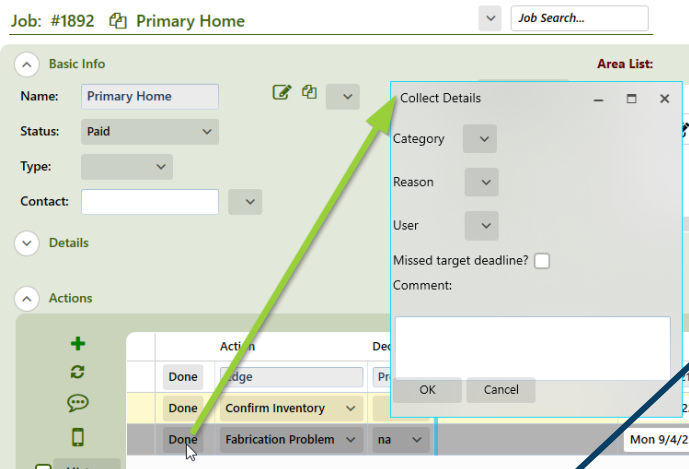
# TRACKING REASON & FREQUENCY

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”.

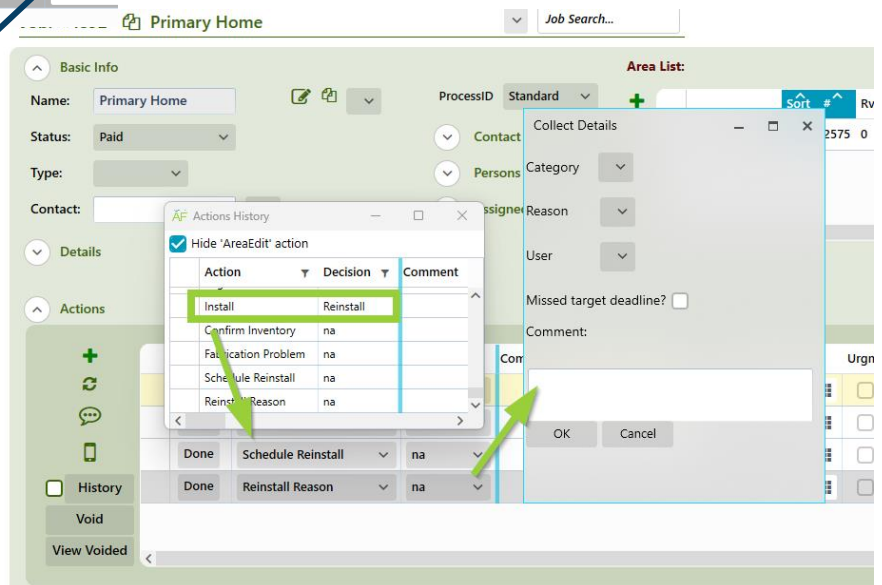


2. Fill out the pop-up fields:

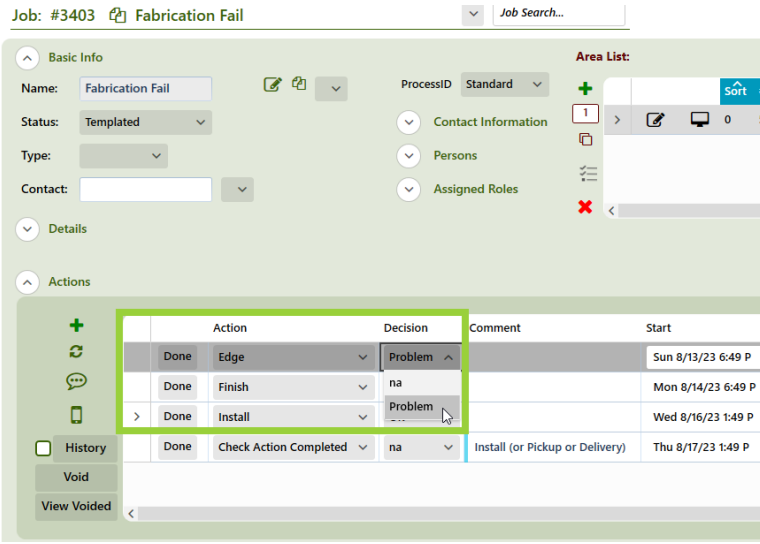
- Category (ie. template, sales, purchasing etc.)
- Reason
- User
- Whether a deadline was missed
- Comment

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.



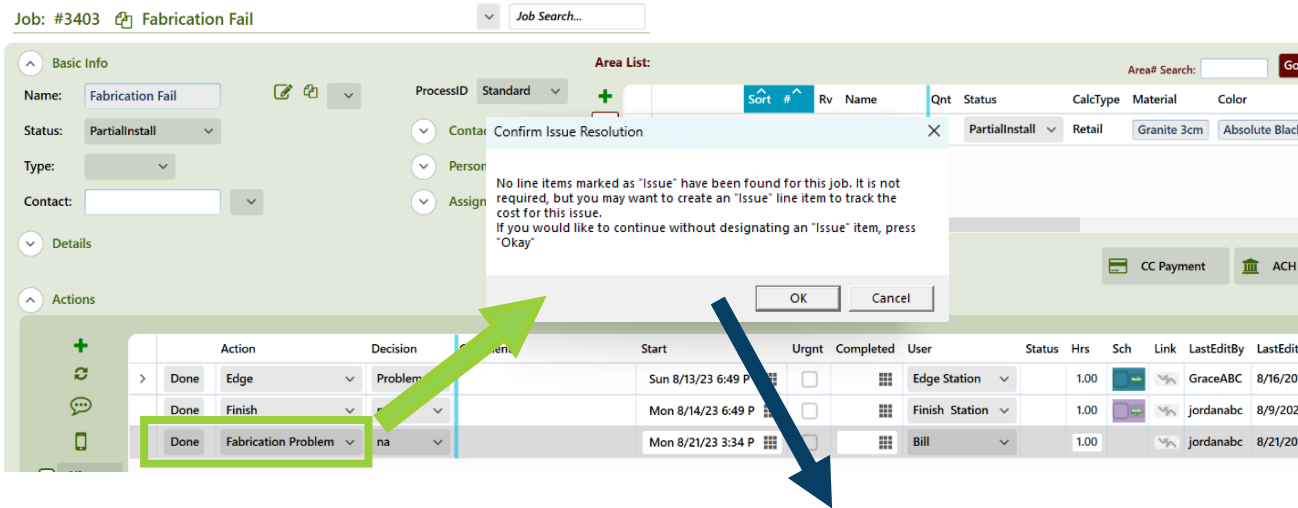
Note: For this to work, you need to have completed the setup process with your account manager so that ActionFlow knows when to ask for an issue reason.



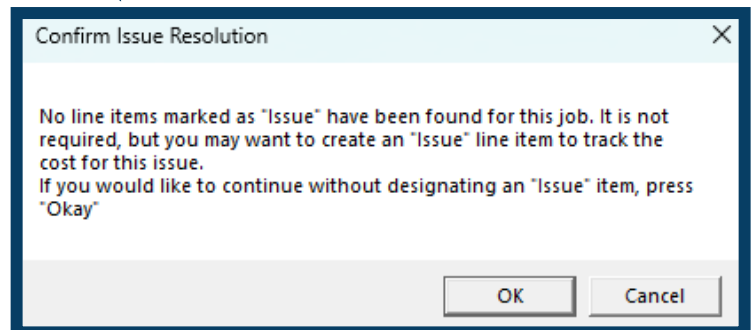
In some cases, the project manager may first need to complete another action like “Edge” or “Install” and select the decision you set up to indicate a problem.

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.



# ISSUE REPORTING - FREQUENCY AND REASON

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

Report Totals				Category Totals	
Total Issues:	15	Total Missed Deadlines:	2	Sales:	0
Total Affected Jobs:	4	Total Remake SqFt:	121.93	Material:	0
				Template:	0
				Fabrication:	3
				Customer:	0
				Install:	2
				CAD/Eng:	5
				Supplier:	0
				Purchasing:	1
				Scheduling:	0
	Revenue	Cost	Margin		
Material:	\$80.00	\$846.64	(\$766.64)		
Non-Material:	\$101.00	\$211.07	(\$110.07)		

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.

Report: Issues by Category And Reason

FromDate: 9/1/2023

Account:

Category:

Show Job Details:

**Issues by Category And Reason** From: 9/1/2023 Through: 10/16/2023

Report Totals				Category Totals	
Total Issues:	15	Total Missed Deadlines:	2	Sales:	0
Total Affected Jobs:	4	Total Remake SqFt:	121.93	Material:	0
				Template:	0
				Fabrication:	3
				Customer:	0
				Install:	2
				CAD/Eng:	5
				Supplier:	0
				Purchasing:	1
				Scheduling:	0
	Revenue	Cost	Margin		
Material:	\$80.00	\$846.64	(\$766.64)		
Non-Material:	\$101.00	\$211.07	(\$110.07)		

**Category: Install**

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

**Category: Fabrication**

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Fabrication - Broke a piece	9/19/2023	3380 - Primary Home	<input checked="" type="checkbox"/>	8.33	Alisha Tanksley	ABC Kitchen & Bath	Bill	
Fabrication - Broke a piece	9/29/2023	3403 - Fabrication Fail	<input type="checkbox"/>	76.38	zzCallbacks	ABC Kitchen & Bath		
Fabrication - Bad fix in shop	10/6/2023	3403 - Fabrication Fail	<input type="checkbox"/>	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.

Report: **Issues by Category And Reason**

FromDate: 8/1/2023 ThroughDate: 10/16/2023

Account: [Null] User: [Null]

Category: [Null] Show Only Missed Deadlines:

Show Job Details:

### Issues by Category And Reason

From: 8/1/2023 Through: 10/16/2023

Report Totals				Category Totals			
Total Issues:	11	Total Missed Deadlines:	11	Sales:	0	Material:	0
Total Affected Jobs:	6	Total Remake SqFt:	102.41	Template:	1	Fabrication:	2
				Customer:	4	Install:	0
				CAD/Eng:	1	Supplier:	0
				Purchasing:	2	Scheduling:	0

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Template - Wrong overhang	8/18/2023	3403 - Fabrication Fail	<input checked="" type="checkbox"/>	76.38	zzCallbacks	ABC Kitchen & Bath	Alisha	

Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
Customer - Entry way not accessible	8/23/2023	3419 - RadTops/Callback/emoLineItem	<input checked="" type="checkbox"/>	17.70	zzCallbacks	ABC Kitchen & Bath	Adam	
Customer - Entry way not accessible	8/23/2023	3405 - Install Fail Customer	<input checked="" type="checkbox"/>	0.00	zzCallbacks	ABC Kitchen & Bath	Alisha	
Customer - Entry way not accessible	8/23/2023	3405 - Install Fail Customer	<input checked="" type="checkbox"/>	0.00	zzCallbacks	ABC Kitchen & Bath	Adam	
Customer - Cabinets not set	8/23/2023	3405 - Install Fail Customer	<input checked="" type="checkbox"/>	0.00	zzCallbacks	ABC Kitchen & Bath	Adam	

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



Job: #1892 Primary Home

Basic Info: Name: Primary Home, Status: Paid, Type: [ ], Contact: [ ]

Area List: Collect Details, Category, Reason, User

Missed target deadline?

Actions: Done, Confirm inventory, Done, Fabrication Problem

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

Report: **Issues by Category And Reason**

FromDate: 8/1/2023 ThroughDate: 10/16/2023

Account: [Null] User: [Null]

Category: [Null] Show Only Missed Deadlines:

Show Job Details:

### Issues by Category And Reason

From: 8/1/2023 Through: 10/16/2023

Report Totals				Category Totals			
Total Issues:	46	Total Missed Deadlines:	11	Sales:	2	Material:	1
Total Affected Jobs:	11	Total Remake SqFt:	194.31	Template:	2	Fabrication:	5
				Customer:	8	Install:	2
				CAD/Eng:	5	Supplier:	0
				Purchasing:	3	Scheduling:	2

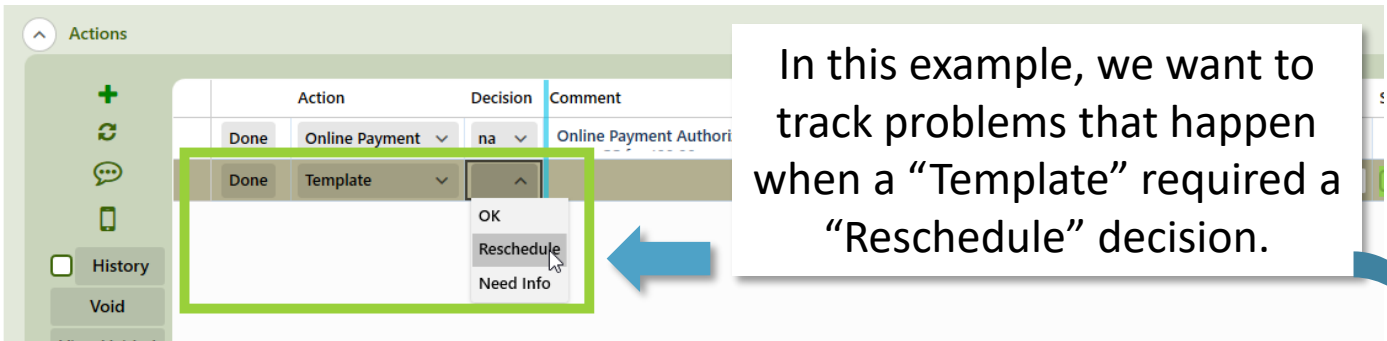
Reason:	Date:	Job:	Missed Deadline:	Remake SqFt:	Customer:	Account:	User:	Comment:
	8/3/2023	3390 - Primary Home	<input type="checkbox"/>	36.98	Alisha Process Test			Template was mislabeled
	8/8/2023	3319 - 123 Elm	<input type="checkbox"/>	0.00	123 Elm (zzReese)	ABC Kitchen & Bath		help
	8/8/2023	3390 - Primary Home	<input type="checkbox"/>	36.98	Alisha Process Test			testing another job in the report
	8/8/2023	3404 - Trestall Fail	<input type="checkbox"/>		zzCallbacks	ABC Kitchen		Fissure discovered at

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)



### 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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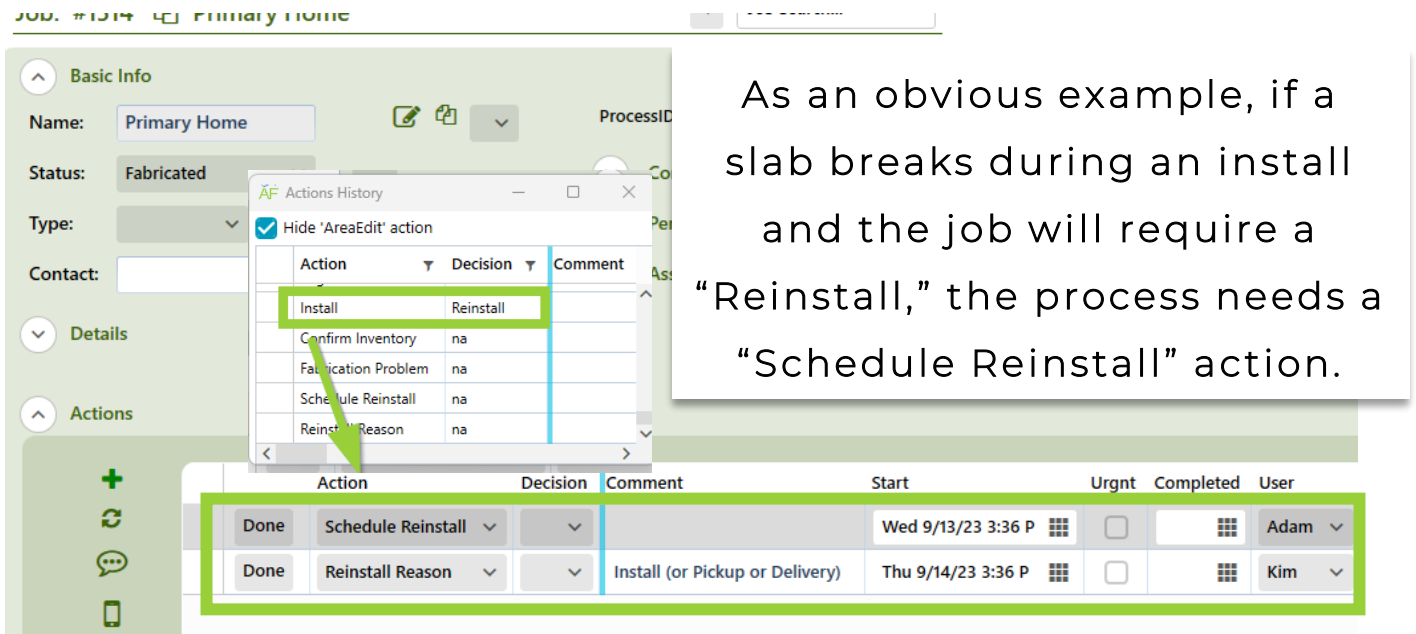
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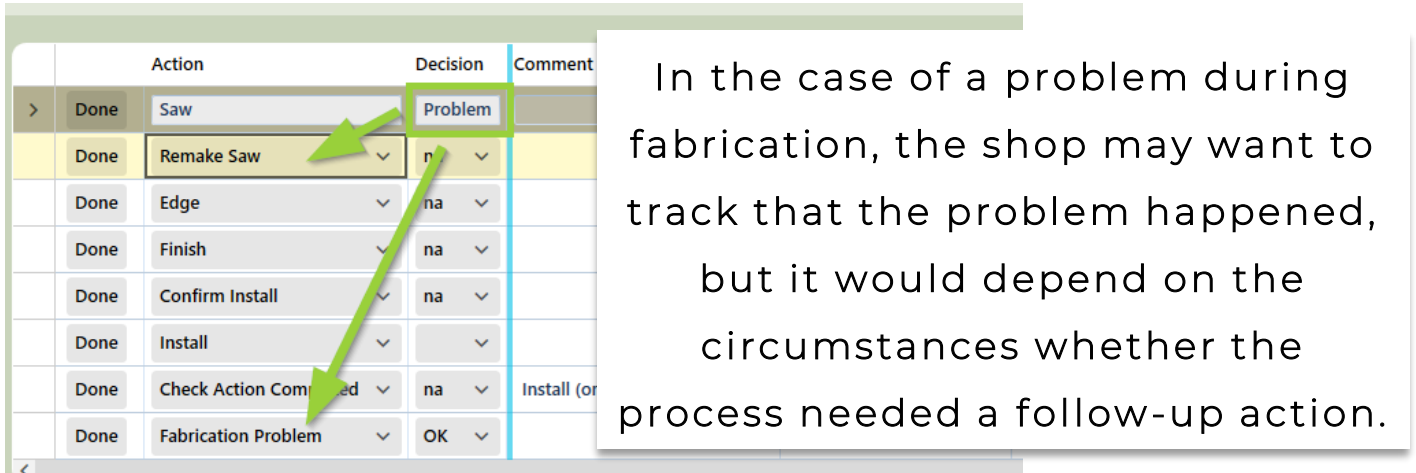
## DO YOU NEED TO UPDATE THE JOB PROCESS?

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.

Action	Decision	Comment	Start	Urgnt	Completed	User
Done	Schedule Reinstall		Wed 9/13/23 3:36 P			Adam
Done	Reinstall Reason	Install (or Pickup or Delivery)	Thu 9/14/23 3:36 P			Kim



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.

Action	Decision	Comment
Done	Saw	Problem
Done	Remake Saw	
Done	Edge	na
Done	Finish	na
Done	Confirm Install	na
Done	Install	
Done	Check Action Completed	na
Done	Fabrication Problem	OK

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.**