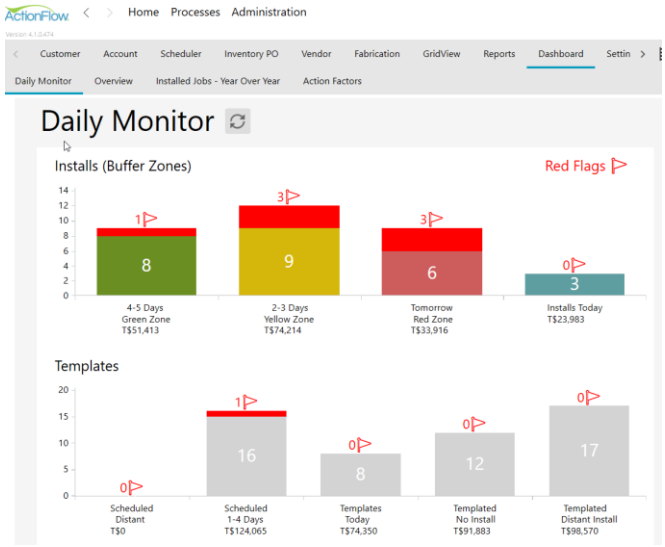
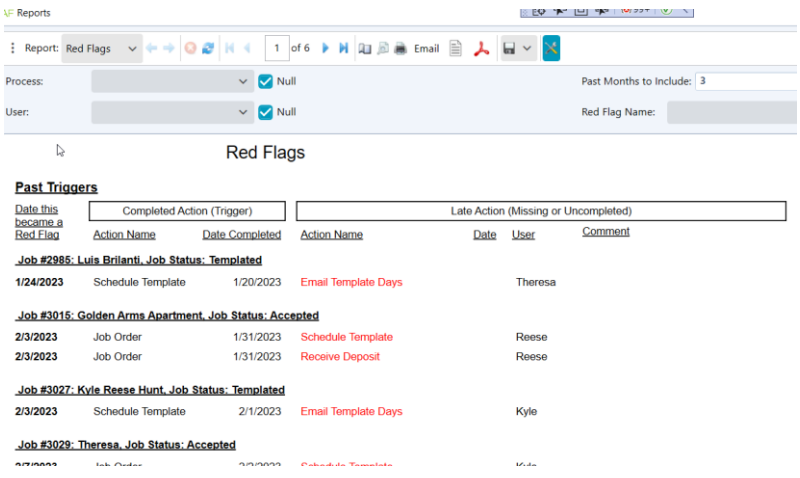
# RED FLAGS SETUP GUIDE

ActionFlow processes and DoNow lists allow you to efficiently work through each job and focus on what needs to happen now. You can trust jobs are being completed without needing to check up on each one. However, sometimes certain tasks can fall through the cracks and red flags alert you when that has happened.

Key points:

- Red Flags do not replace DoNow lists.
- Your employees must complete their DoNow actions and the jobs should be followed from start to finish.
  - If your ActionFlow processes don't accurately reflect what you do in practice, ActionFlow should be tweaked.
- You can easily have too many Red Flags.
- Red Flags address the issues with the most monetary and scheduling impact.




**This guide will help you set up red flags in ActionFlow. Refer to the workshop video and presentation at support.actionflow.net/redflags or talk to your account administrator for additional support.**

ActionFlow

# PAST TRIGGERS

## START

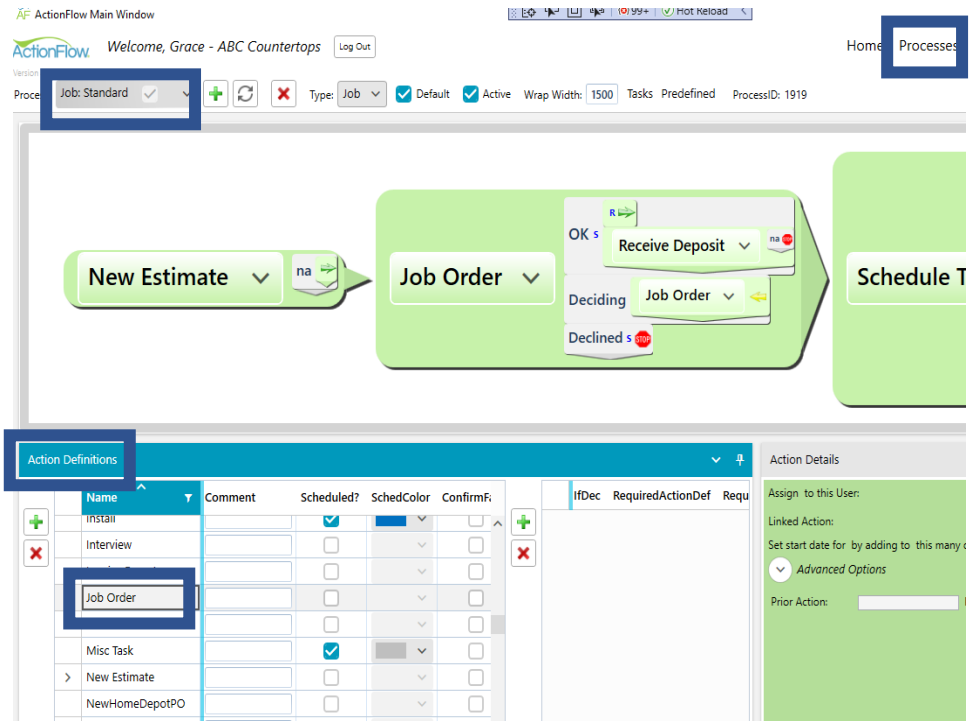
- What is an action that must happen <u>after</u> a sale/job order?
  1. **<u>Write the action name in the “second action” line.</u>**
- What is the normal time this would be completed?
  2. **<u>Write the # of days in the “normal # of days” line.</u>**
- What # of days would be considered a red flag if this action remained uncompleted?
  3. **<u>Write the # of days in the “red flag days” line.</u>**
- Repeat the process for another action

| **First Action (Completed)** | **Normal # Of Days** | **Red Flag Days** | **Second Action (Uncompleted)** |
|---|---|---|---|
| **Job Order** EXAMPLE | **2** | **3** | **Schedule Template** |
| **Job Order** | | | |
| | | | |

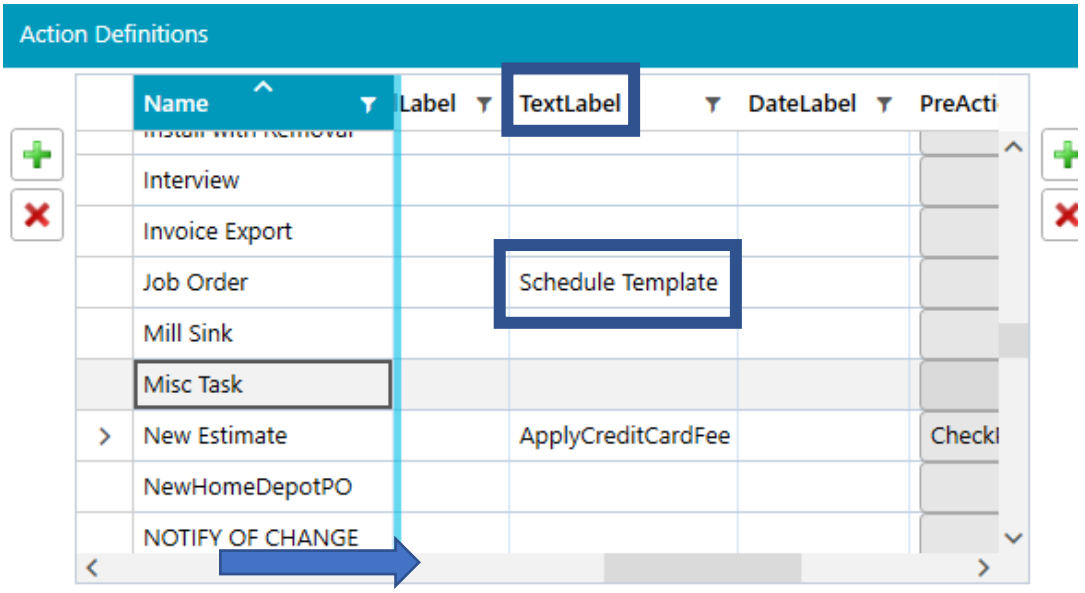
# PAST TRIGGERS

## OPEN ACTIONFLOW

1. Go to “Processes”.
2. Go to your default job process (it will have a check by the process.)
3. In the “Action Definitions” grid, find row for the “First Action” from the worksheet.

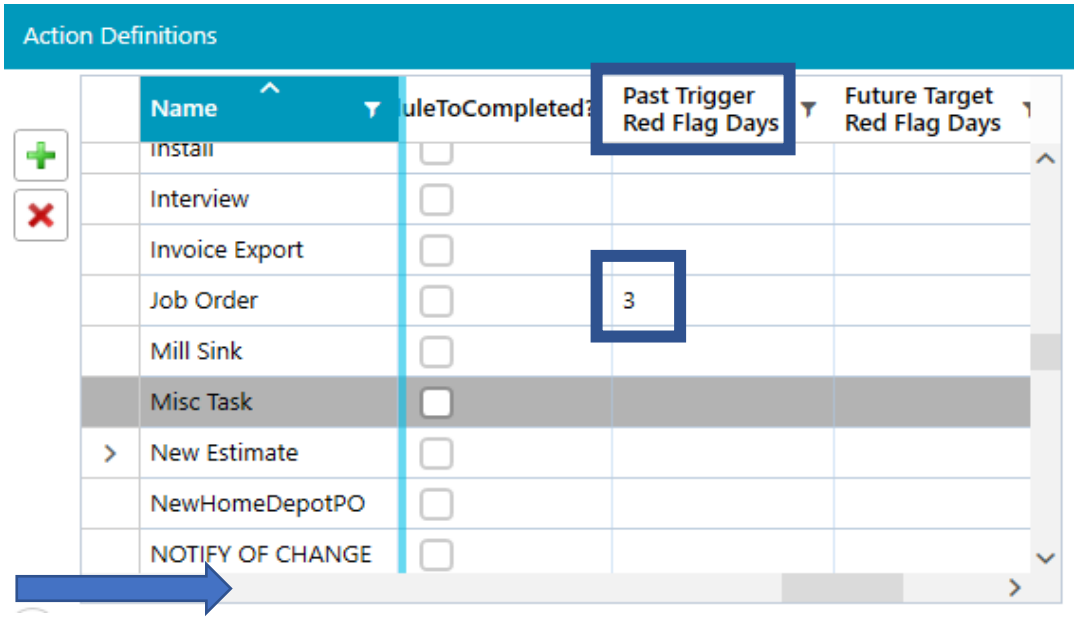



4. Scroll to the right and find the “TextLabel” column.
5. Add your “Second Action” from the worksheet to the “TextLabel” field.

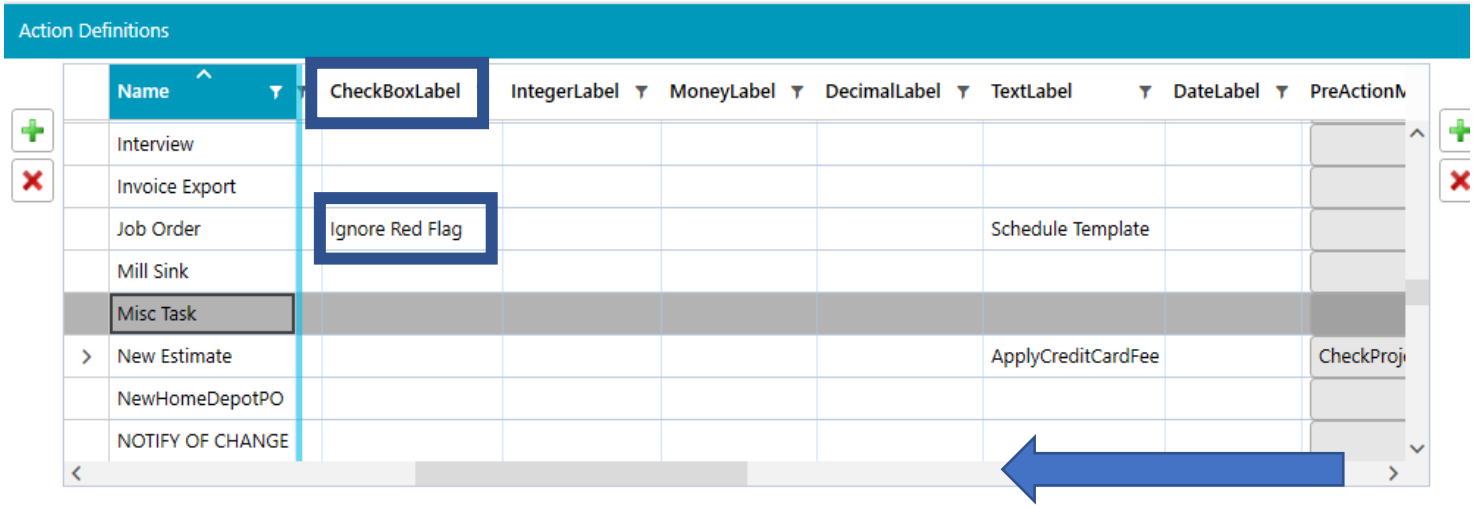


# PAST TRIGGERS

6. Scroll to the right and find the “Past Trigger Red Flag Days” column.
7. Add your “Red Flag Days” from the worksheet to the “Past Trigger Red Flag Days” field.




8. Scroll back to the left and find the “CheckBoxLabel” field and add “Ignore Red Flag”.



ActionFlow

# FUTURE TARGETS

## START

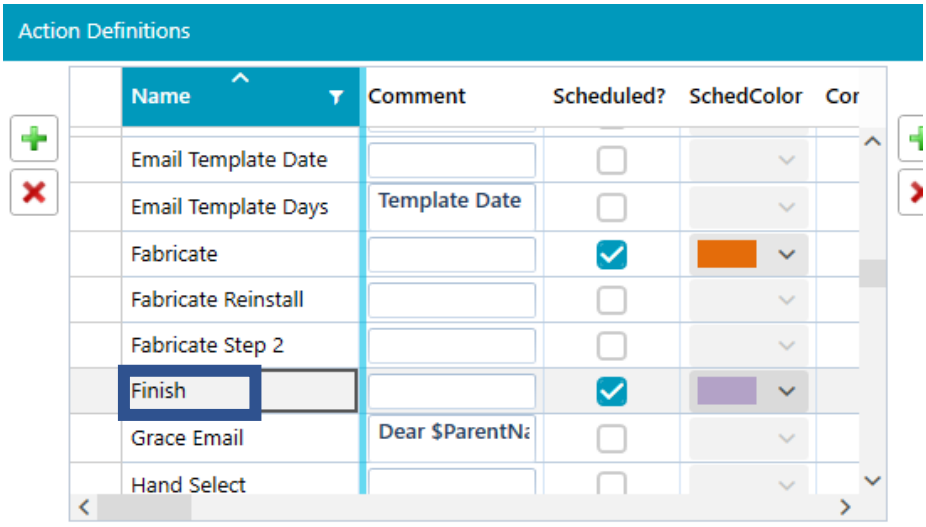
- What is an action that must happen <u>before</u> an install? Note: future target red flags always refer to a fab target event.
  1. **<u>Write the action name in the “first action” line.</u>**
- What is the normal time this would be completed?
  2. **<u>Write the # of days in the “normal # of days” line.</u>**
- What # of days would be considered a red flag if this action remained uncompleted?
  3. **<u>Write the # of days in the “red flag days” line.</u>**
- Repeat the process for another action

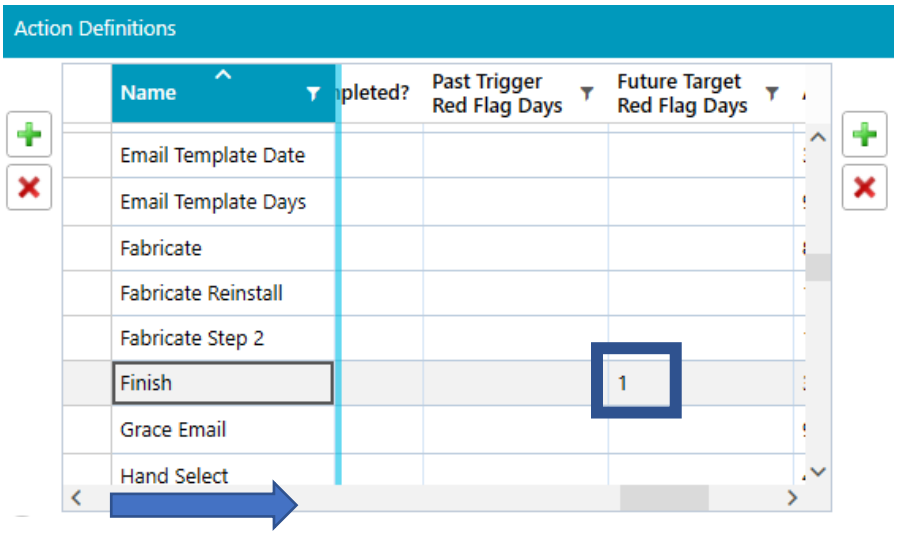
| **First Action (Uncompleted)** | **Normal # Of Days** | **Red Flag Days** | **Second Action (Future Target)** |
|---|---|---|---|
| **Finish** EXAMPLE | **2** (Days before install) | **1** (Day before install) | **Install** |
| **Finish** | | | |
| | | | |

# FUTURE TARGETS

## OPEN ACTIONFLOW

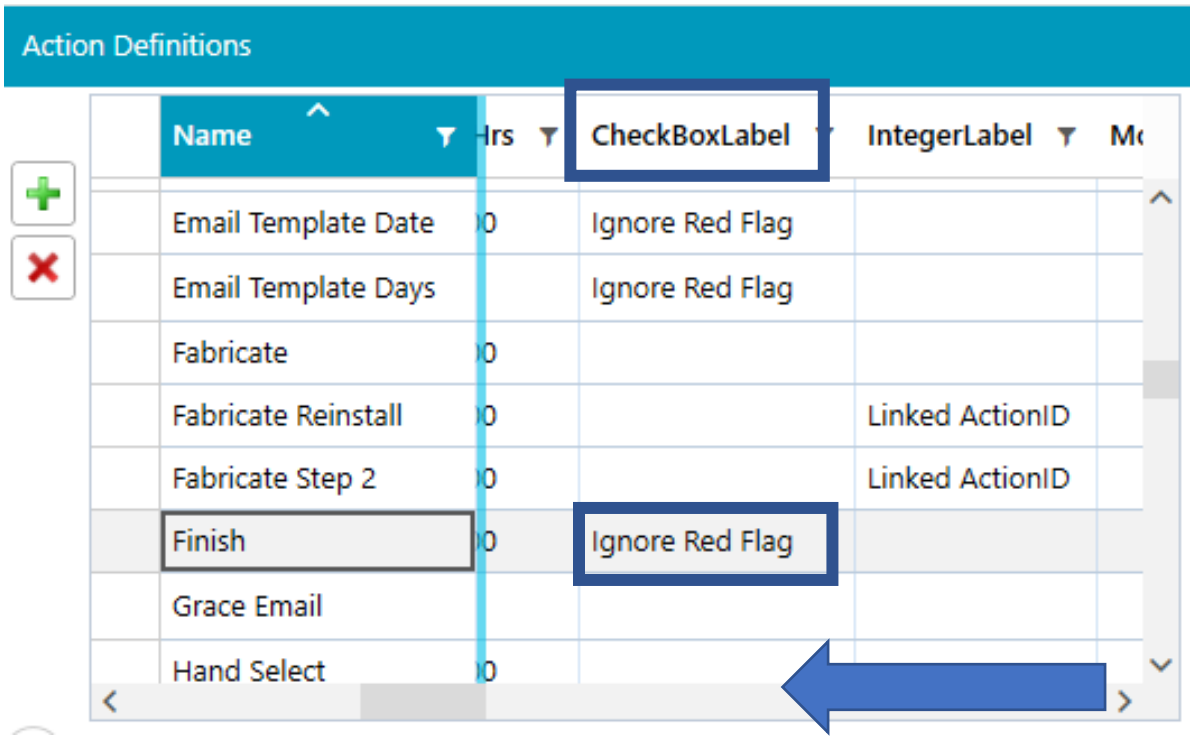
1. Go to “Processes”.
2. Go to your default job process (it will have a check by the process.)
3. In the “Action Definitions” grid, find row for the “First Action” from the worksheet.
4. Scroll to the right and find the “Future Target Red Flag Days” column.
5. Add your “Red Flag Days” from the worksheet to the “Future Target Red Flag Days” field.



# FUTURE TARGETS

6. Scroll back to the left and find the “CheckBoxLabel” field and add “Ignore Red Flag”.

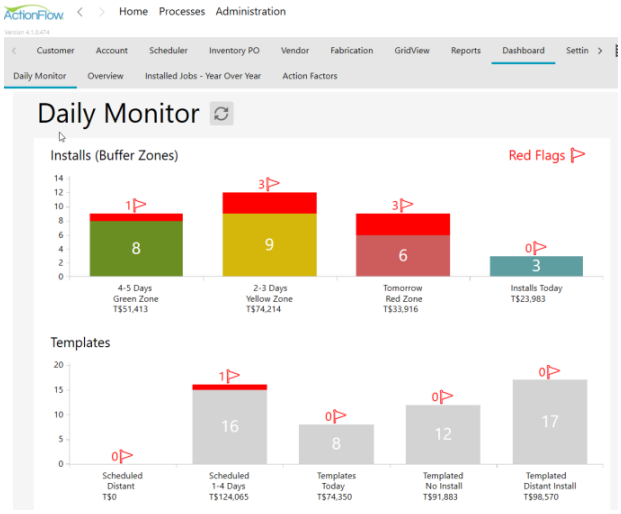


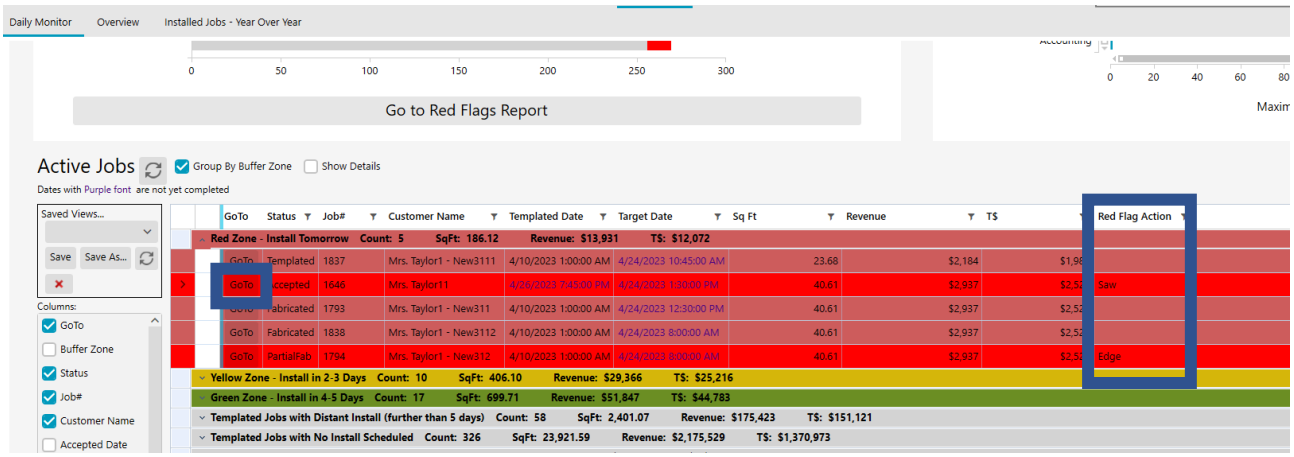

Note: Future targets always refer to an install event which might be an “Install”, “Install Backsplash”, or another “Fab Target”. Therefore, ActionFlow already knows the “Second Action” and nothing needs to be added to the “TextLabel” field.

# TRACKING RED FLAGS

Now that you have set up red flag alerts. Go the to “Dashboard” tab and click the “Daily Monitor.” Hit “Refresh” and you may see red columns stacked on top of your install and template job columns.

The # of red flag jobs are in addition to jobs that are on track. In the example to the right, there are 2 jobs scheduled to be installed today that are on track and 2 jobs scheduled to be installed today that have red flags.




Next, click “Go to Red Flags Report” and you can view all the red flag alerts.

Lastly, scroll down on the “Daily Monitor” page to the Active Job lists which are broken out by upcoming install and template date. You can view the “Red Flag Action” and “Go To” the job to address the problem.