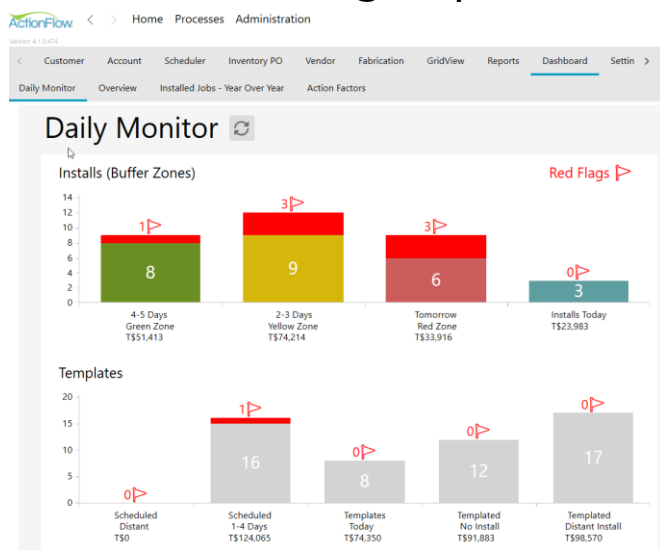
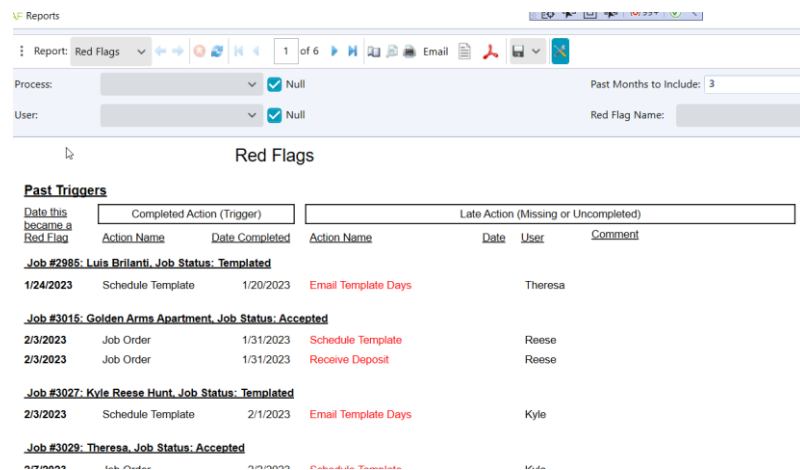


RED FLAGS SETUP GUIDE

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.

Red Flags

Past Triggers

Date this became a Red Flag	Action Name	Date Completed	Action Name	Date	User	Comment
Job #2988: Luis Brilanti Job Status: Templated						
1/24/2023	Schedule Template	1/20/2023	Email Template Days		Theresa	
Job #3015: Golden Arms Apartment Job Status: Accepted						
2/3/2023	Job Order	1/31/2023	Schedule Template		Reese	
2/3/2023	Job Order	1/31/2023	Receive Deposit		Reese	
Job #3027: Kyle Reese Hunt Job Status: Templated						
2/3/2023	Schedule Template	2/1/2023	Email Template Days		Kyle	
Job #3029: Theresa Job Status: Accepted						
2/7/2023	Job Order	2/2/2023	Schedule Template		Kyle	

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.

PAST TRIGGERS

START

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

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

EXAMPLE

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.

The screenshot shows the ActionFlow Main Window. At the top, there's a navigation bar with "Home" and "Processes" (highlighted with a blue box). Below it, a toolbar contains "Job: Standard" (highlighted with a blue box), a plus icon, a refresh icon, a minus icon, and "Type: Job". There are also checkboxes for "Default" and "Active", and a "Wrap Width: 1500" setting. The main area displays a process flow diagram with steps: "New Estimate" (highlighted with a blue box), "Job Order" (highlighted with a blue box), "Receive Deposit", "Job Order", and "Schedule T". Below the diagram is the "Action Definitions" grid. The "Job Order" row is highlighted with a blue box. The grid has columns: Name, Comment, Scheduled?, SchedColor, ConfirmF, IfDec, RequiredActionDef, and Requi.

Name	Comment	Scheduled?	SchedColor	ConfirmF	IfDec	RequiredActionDef	Requi
Install		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
Interview		<input type="checkbox"/>		<input type="checkbox"/>			
Job Order		<input type="checkbox"/>		<input type="checkbox"/>			
Misc Task		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
New Estimate		<input type="checkbox"/>		<input type="checkbox"/>			
NewHomeDepotPO		<input type="checkbox"/>		<input type="checkbox"/>			

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

This close-up screenshot shows the "Action Definitions" grid. The "TextLabel" column is highlighted with a blue box. The "Job Order" row is also highlighted with a blue box, and the value "Schedule Template" is visible in the "TextLabel" field. A blue arrow points to the right at the bottom of the grid, indicating scrolling.

Name	Label	TextLabel	DateLabel	PreActi
Interview				
Invoice Export				
Job Order		Schedule Template		
Mill Sink				
Misc Task				
New Estimate		ApplyCreditCardFee		Checkl
NewHomeDepotPO				
NOTIFY OF CHANGE				

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.

Action Definitions

Name	RuleToCompleted?	Past Trigger Red Flag Days	Future Target Red Flag Days
Install	<input type="checkbox"/>		
Interview	<input type="checkbox"/>		
Invoice Export	<input type="checkbox"/>		
Job Order	<input type="checkbox"/>	3	
Mill Sink	<input type="checkbox"/>		
Misc Task	<input type="checkbox"/>		
> New Estimate	<input type="checkbox"/>		
NewHomeDepotPO	<input type="checkbox"/>		
NOTIFY OF CHANGE	<input type="checkbox"/>		

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

Action Definitions

Name	CheckBoxLabel	IntegerLabel	MoneyLabel	DecimalLabel	TextLabel	DateLabel	PreActionN
Interview							
Invoice Export							
Job Order	Ignore Red Flag				Schedule Template		
Mill Sink							
Misc Task							
> New Estimate					ApplyCreditCardFee		CheckProj
NewHomeDepotPO							
NOTIFY OF CHANGE							

FUTURE TARGETS

START

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

**First Action
(Uncompleted)**

**Normal #
Of Days**

**Red Flag
Days**

**Second Action
(Future Target)**

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

EXAMPLE

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.

Action Definitions

Name	Comment	Scheduled?	SchedColor	Cor
Email Template Date		<input type="checkbox"/>		
Email Template Days	Template Date	<input type="checkbox"/>		
Fabricate		<input checked="" type="checkbox"/>	Orange	
Fabricate Reinstall		<input type="checkbox"/>		
Fabricate Step 2		<input type="checkbox"/>		
Finish		<input checked="" type="checkbox"/>	Purple	
Grace Email	Dear \$ParentN:	<input type="checkbox"/>		
Hand Select		<input type="checkbox"/>		



Action Definitions

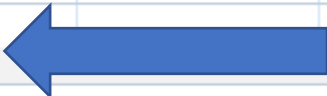
Name	Completed?	Past Trigger Red Flag Days	Future Target Red Flag Days
Email Template Date			
Email Template Days			
Fabricate			
Fabricate Reinstall			
Fabricate Step 2			
Finish			1
Grace Email			
Hand Select			

FUTURE TARGETS

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

Action Definitions

	Name	Hrs	CheckBoxLabel	IntegerLabel	Mo
	Email Template Date	0	Ignore Red Flag		
	Email Template Days		Ignore Red Flag		
	Fabricate	0			
	Fabricate Reinstall	0		Linked ActionID	
	Fabricate Step 2	0		Linked ActionID	
	Finish	0	Ignore Red Flag		
	Grace Email				
	Hand Select	0			

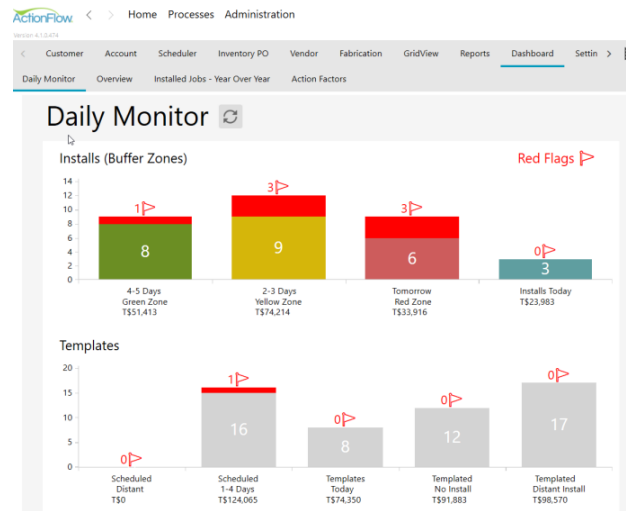


Note: Future targets always refer to an install event which might be an “Install”, “Install Backsplash”, or another “Fab Target”. Therefore, ActionFlow already knows the “Second Action” and nothing needs to be added to the “TextLabel” field.

TRACKING RED FLAGS

Now that you have set up red flag alerts. Go to the “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.

Daily Monitor Overview Installed Jobs - Year Over Year

Go to Red Flags Report

Active Jobs Group By Buffer Zone Show Details

Dates with Purple font are not yet completed

GoTo	Status	Job#	Customer Name	Templated Date	Target Date	Sq Ft	Revenue	TS	Red Flag Action
Red Zone - Install Tomorrow Count: 5 SqFt: 186.12 Revenue: \$13,931 TS: \$12,072									
GoTo	Templated	1837	Mrs. Taylor1 - New3111	4/10/2023 1:00:00 AM	4/24/2023 10:45:00 AM	23.68	\$2,184	\$1,960	
GoTo	Accepted	1646	Mrs. Taylor11	4/28/2023 1:45:00 PM	6/26/2023 1:30:00 PM	40.61	\$2,937	\$2,520	Saw
GoTo	Fabricated	1793	Mrs. Taylor1 - New311	4/10/2023 1:00:00 AM	4/24/2023 12:30:00 PM	40.61	\$2,937	\$2,520	
GoTo	Fabricated	1838	Mrs. Taylor1 - New3112	4/10/2023 1:00:00 AM	4/24/2023 8:00:00 AM	40.61	\$2,937	\$2,520	
GoTo	PartialFab	1794	Mrs. Taylor1 - New312	4/10/2023 1:00:00 AM	4/24/2023 8:00:00 AM	40.61	\$2,937	\$2,520	Edge
Yellow Zone - Install in 2-3 Days Count: 10 SqFt: 406.10 Revenue: \$29,366 TS: \$25,216									
Green Zone - Install in 4-5 Days Count: 17 SqFt: 699.71 Revenue: \$51,847 TS: \$44,783									
Templated Jobs with Distant Install (further than 5 days) Count: 58 SqFt: 2,401.07 Revenue: \$175,423 TS: \$151,121									
Templated Jobs with No Install Scheduled Count: 326 SqFt: 23,921.59 Revenue: \$2,175,529 TS: \$1,370,973									