Account Manager List and Dashboards

The below mentioned list should be created, saved, and shared with the respective roles. Any of these lists can be customized with additional filters to focus the list on specific branches, divisions, sales reps, account managers, etc. In several of the advanced search list screenshots below, you will see the filter "Current User". This will filter the results to the user who is logged in and viewing that list. You can swap out "Current User" with your actual name if preferred. Display columns, sorting, and grouping is at the user's discretion. These lists should be managed on regular intervals determined on your specific needs. Notice the new location of the filter, display, sort, and group options within the Evolution user interface.

Activities

- My Open Tasks
- My Open Issues

Opportunity

- My Active Opportunities
- My Work Order Pipeline

Contacts

- My Customers

Properties

- My Properties

Work Tickets

- My Open and scheduled Work Tickets (Through This Week)
- My Pending Approval Work Tickets

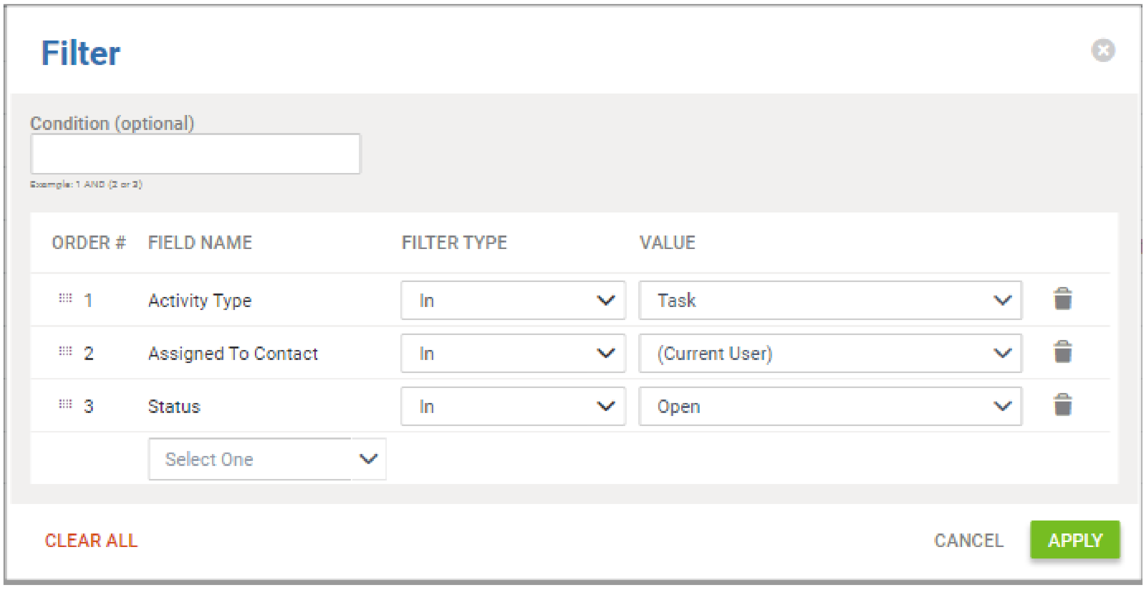
Reports

- My Aging A/R
- My Contract Renewals

Activities – My Open Tasks

Concept – This list shows all your tasks that have not been completed. Tip* display and sort by due date.

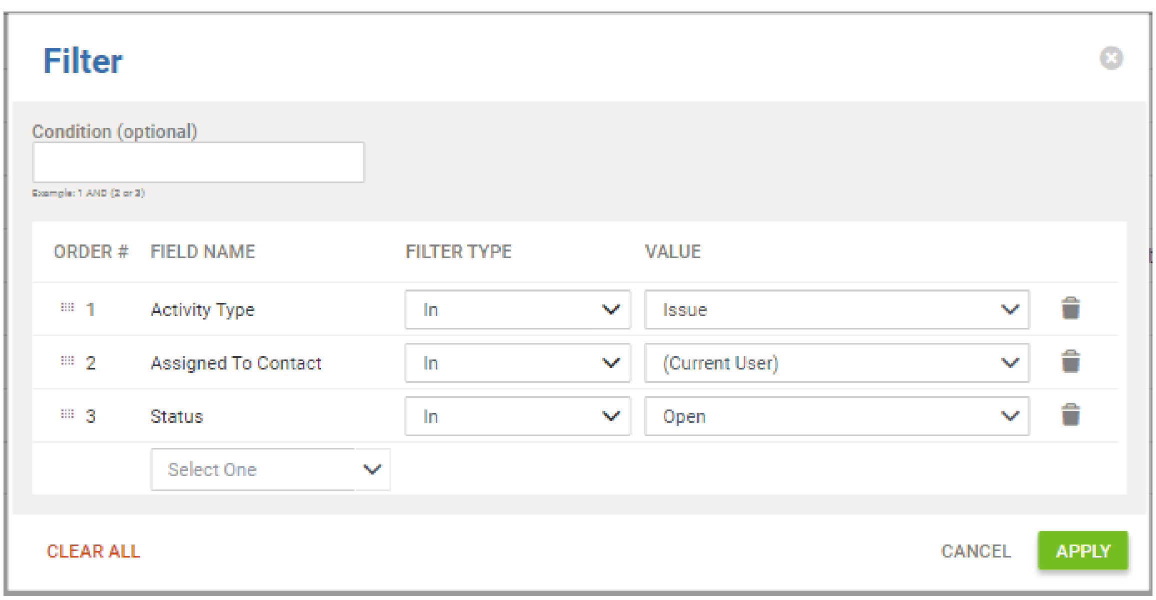
Action – If task is complete, check the green check box in the bottom right corner.



Activities – My Open Issues

Concept – This list shows all your issues that have not been completed. Tip* display and sort by due date.

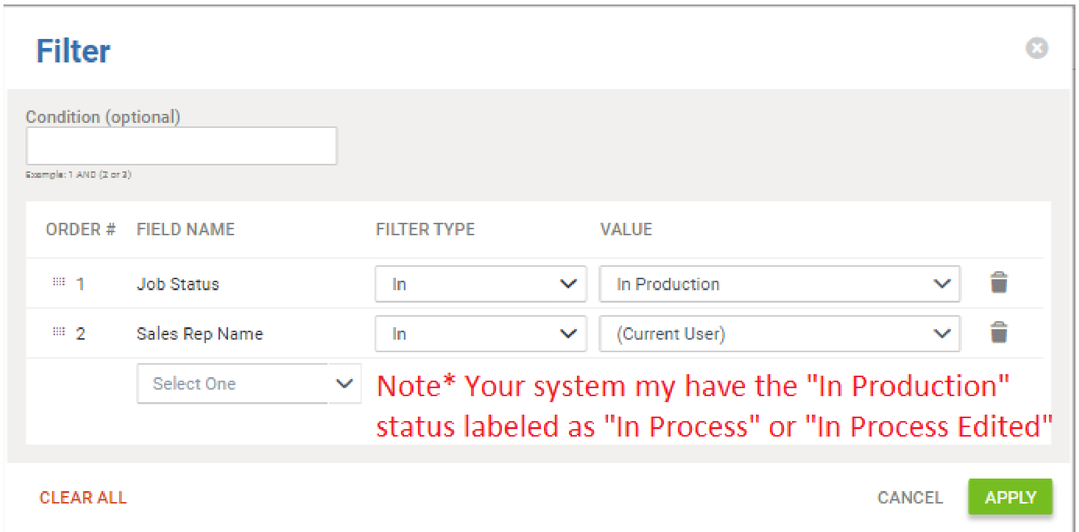
Action – If issue is complete, check the green check box in the bottom right corner.



Opportunity – My Active Opportunities

Concept – This list is used to view all opportunities that have been won and are still in production. Tip* display estimated GM% and actual GM%, P&L Report, SA Date, SA Score, and other relative fields to review your active opportunities.

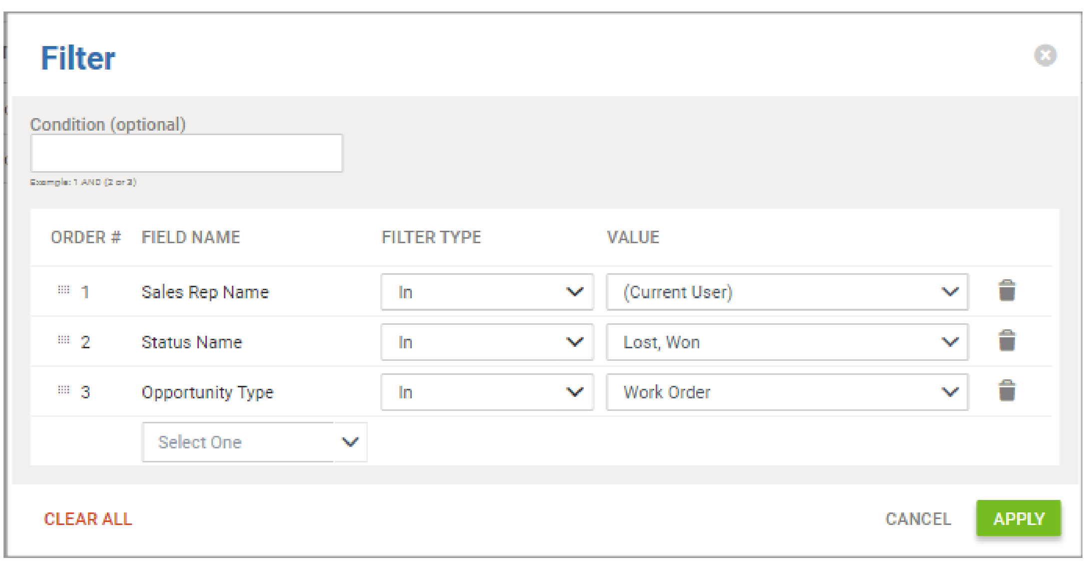
Action – Win or lose when applicable.



Opportunity – My Work Order Pipeline

Concept – This list is used to view all work order opportunities that have not been won or lost. Tip* Group by status name and display last activity, next activity, proposed date, new task, new email, and other relative fields to optimize pipeline management.

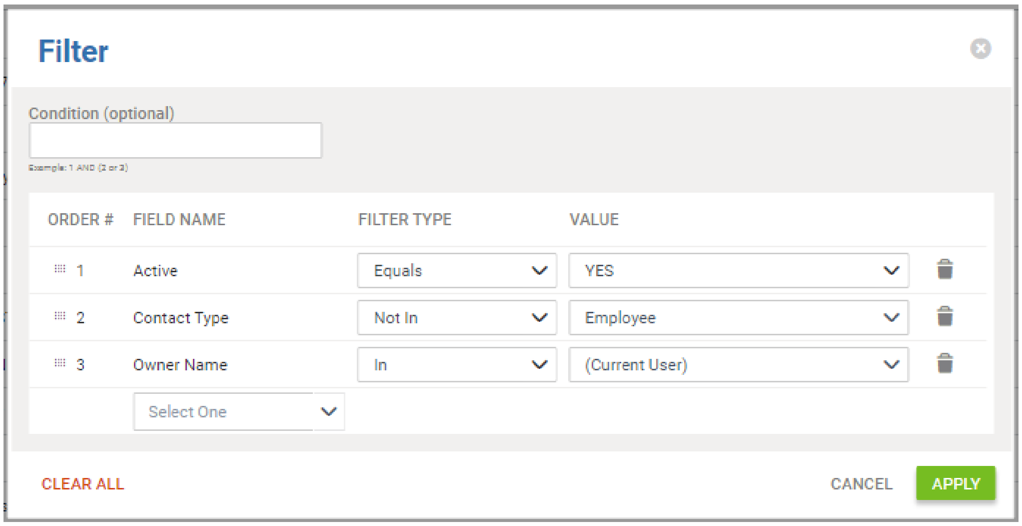
Action – Win or lose when applicable.



Contacts – My Customers

Concept – This list is used to view all your active contacts. Tip* Display new task, new appt, and new email to quickly create activities with your customers. Group by contact type.

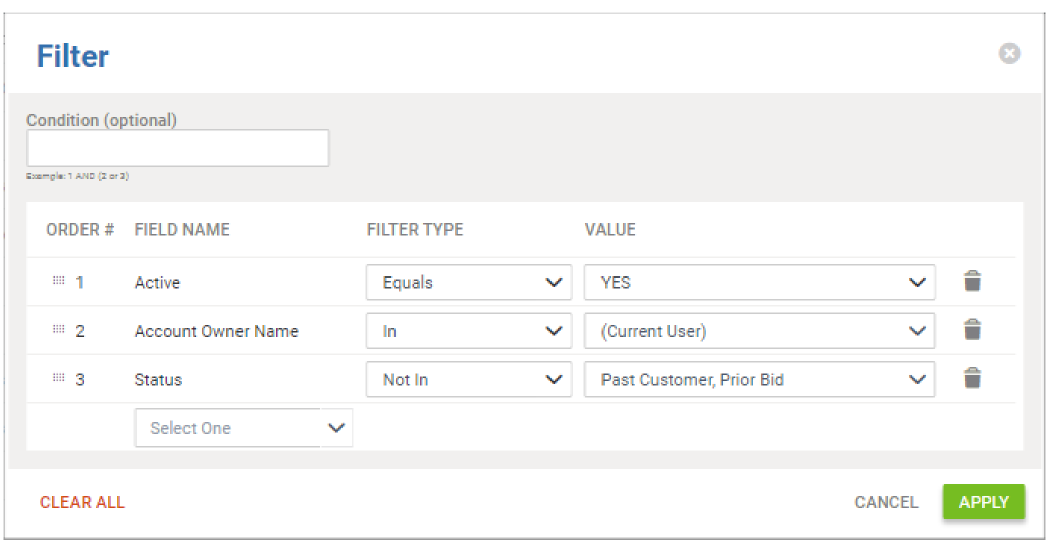
Action – These lists can be used for bulk email campaigns, managing new leads, and general CRM.



Properties – My Properties

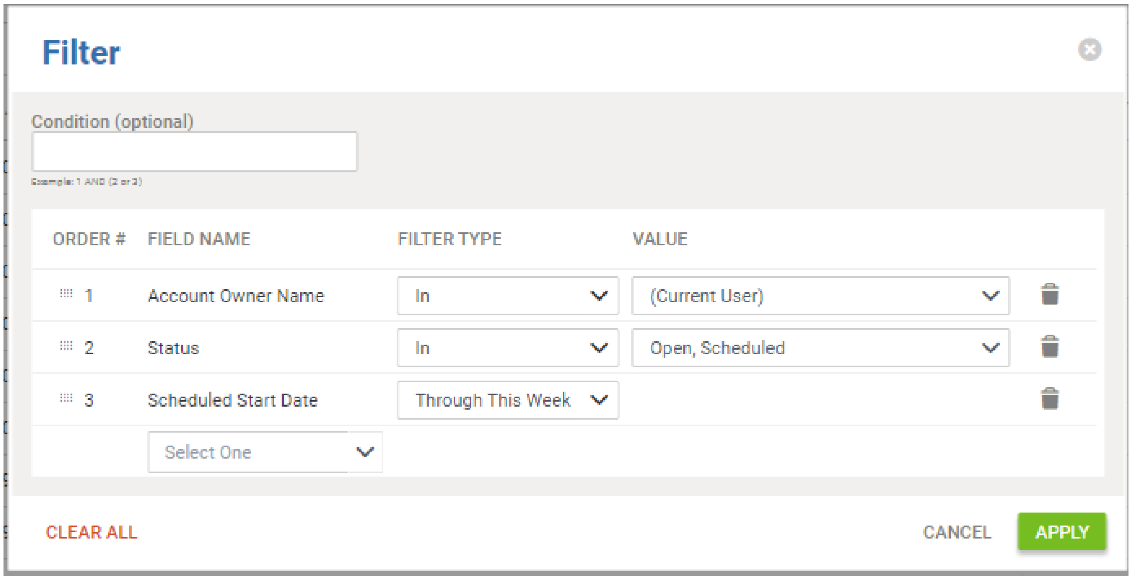
Concept – This list is used to view all your active properties. Tip* Display new task, new appt, and new email, and new issue to quickly create activities regarding your properties. Site Audit Date (SA Date) and Site Audit Score (SA Score) can also be displayed to better understand the current state of your properties. Group by property status.

Action – This list is primary used to manage new leads and general CRM.



Work Tickets – My Open and Scheduled Work Tickets (Through This Week)

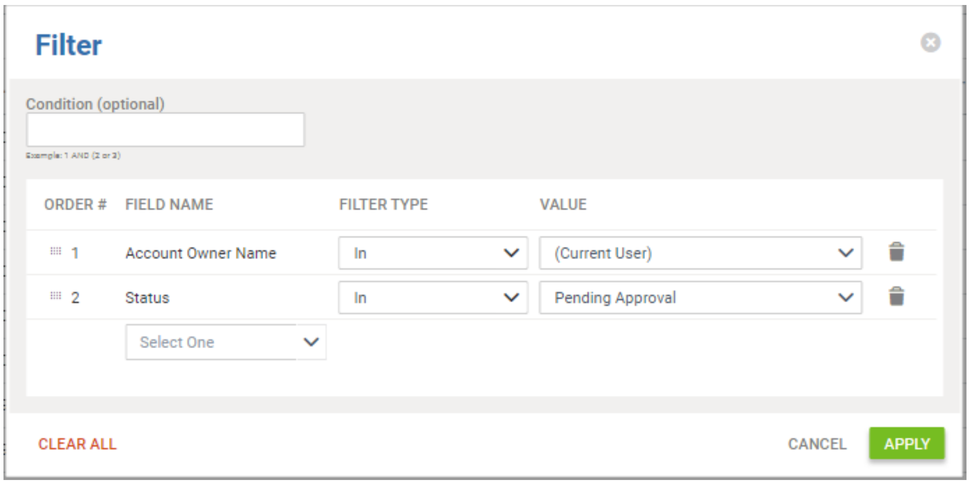
Concept – This list is used to search the anticipated start date of open work tickets and the scheduled date of scheduled work tickets. Tip* Display GM%, hours variance (Bud Var), and other key fields for quick reporting. Group by status.



Work Tickets – My Pending Approval Work Tickets

Concept – This list is used to review your work tickets that are pending approval. Pending Approval is the status that denotes the work is complete but waiting for approval before the invoice is created. Tip* Display GM%, hours variance (Bud Var), completed date, materials est. materials act, and other key fields for quick reporting.

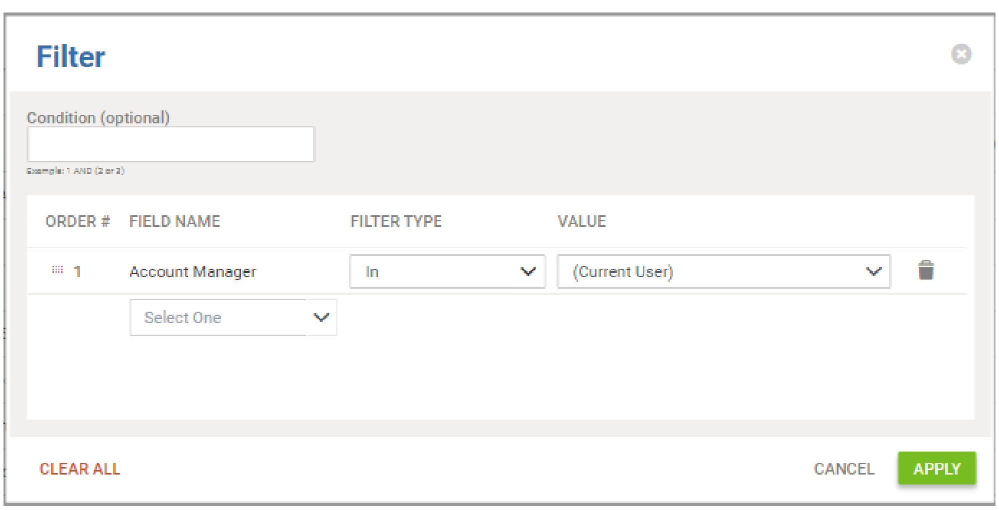
Action – If work ticket can be approved, hover over gear in the bottom right corner, and approve the work ticket. If there is work remaining, uncomplete the work ticket and create an issue for the operations manager.



Reports – A/R Aging List – My Aging A/R

Concept – Use this list to manage aging invoices where you are the account owner of the property.

Action – Display the billing contact email and phone number for quick collection attempts. Each line can be clicked on to view and resend the overdue invoice.



Reports – Contract Renewals – My Contract Renewals

Concept – This list is used to view all contract opportunities that have not yet been renewed. Tip* Date selector on main screen queries all opportunities with a renewal date after the selected date. If the renewal date is null, the end date will be referenced.

Action – Identify the opportunity needing renewed, create renewal. Win or lose renewal to remove from this list.