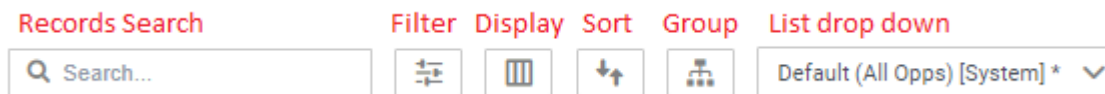


Operations Manager – List and Dashboards

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.



Activities

- My Open Tasks
- My Open Issues

Opportunity

- In Process After End Date - Weekly

Work Tickets

- Open Work Tickets (Through This Week) - Daily
- Scheduled Work Tickets W/O Future Visits - Daily
- Completed With Committed Cost - Daily
- Completed Last Week - Weekly

Attendance/Time

- Employee Clock Time – Daily Roll Call - Daily
- Clock Time – Clocked in – Not Clocked Out - Daily

Purchasing

- Material Needs - Weekly
- Missed Allocations - Daily
- Aging Purchase Receipts - Weekly

Activities – My Open Tasks

Concept - This list shows all of 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.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Activity Type	In	Task
2	Assigned To Contact	In	(Current User)
3	Status	In	Open

Select One

CLEAR ALL **CANCEL** **APPLY**

Activities – My Open Issues

Concept - This list shows all of 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.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Activity Type	In	Issue
2	Assigned To Contact	In	(Current User)
3	Status	In	Open

Select One

CLEAR ALL **CANCEL** **APPLY**

Opportunity List - In Process After End Date

Concept - This list should be maintained as close to zero opps as possible. All opportunities within this list contain work tickets that are not completed but the end date of the opportunity has passed. The list will assist in maintaining earned revenue and timely invoicing.

Action - Complete or cancel remaining work tickets

Filter ✕

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	End Date	Through Yesterday ▼	🗑️
2	Job Status	In ▼	In Production ▼ 🗑️
<input type="text" value="Select One"/> ▼			

CLEAR ALL CANCEL APPLY

Work Tickets List - Open Work Tickets (Through This Week)

Concept - This list should be maintained as close to zero work tickets as possible. This list is vital to recognize unscheduled work tickets and newly sold work.

Action - Schedule all tickets on this list.

Filter ✕

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Work Ticket Status Code	In ▼	Open ▼ 🗑️
2	Anticipated Start Date	Through This Week ▼	🗑️
<input type="text" value="Select One"/> ▼			

CLEAR ALL CANCEL APPLY

Work Tickets List – Scheduled Work Tickets W/O Future Visits

Concept - This list should be maintained as close to zero work tickets as possible. This list shows work tickets that have been scheduled at some point in the past, with no future visits scheduled for return to complete the work.

Action - Complete the work ticket or schedule a future visit.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Work Ticket Status Code	In	Scheduled
2	Scheduled Start Date	Through Yesterday	
3	Future Visits	Equals	0

Select One

CLEAR ALL CANCEL APPLY

Work Tickets List - Completed With Committed Cost

Concept – This list should be maintained as close to zero work tickets as possible. This list show completed or pending approval work tickets that have purchase receipts in new status. The question would be how did we complete the work without ever receiving the materials, or did we prematurely complete the work tickets. This list is especially important for T&M tickets that are pending approval.

Action – Drill into the work ticket, drill into the cost, find the items with a quantity in the committed column, expand and drill into the purchase receipt. Determine if the receipt should be deleted or received. Also, if ticket was prematurely completed, uncomplete the work ticket.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Work Ticket Status Code	In	Complete, Pending Approval
2	Has Committed Costs	Equals	YES

Select One

CLEAR ALL CANCEL APPLY

Work Tickets List - Completed Last Week

Concept – This list is used to verify weekly efficiencies and cost. Compare gross margin %, drive time %, anticipated start date, est vs act labor, materials, equipment, sub, and other costs.

Action – Question hour discrepancies, cost variances, excessive drive time. Verify that the correct ticket was completed by comparing anticipated start date vs completed date.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Completed Date	Last Week	
	Select One		

CLEAR ALL **CANCEL** **APPLY**

Reports (Employee Clock Time) – Daily Roll Call

Concept – This list is to view whether an employee has had clock time in the last 7 days. A check mark indicates the employee has clock time for that day. Add employee name as a filter to remove salaried or management from the list.

Action – Correct inaccuracies within the time entry screen.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Contact Type	Equals	employee
2	Active	Equals	YES
	Select One		

CLEAR ALL **CANCEL** **APPLY**

Reports (Clock Time) – Clocked In – Not Clocked Out

Concept – This list is primarily used at the end of the day to view who is still out working or who’s time hasn’t been accepted yet.

Action – All employees time should be accepted in time entry before beginning work the next day.

Filter ✕

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Clock Start	Today	<input type="text"/>
2	Clock End	Custom - Is Null	<input type="text"/>
		Select One	<input type="text"/>

CLEAR ALL CANCEL **APPLY**

Purchasing Assistant - Material Needs

Concept – This list shows all estimated items that have not yet been ordered or allocated on open and scheduled work tickets. The user can specify purchase date on the main purchasing assistant list screen which represents the scheduled start date of the work ticket.

Action – Select items to be purchased and create a new purchase receipt.

Advanced Search | Material Needs

Filter | Display | Sort | Group

Condition (Optional) Example: 1 AND (2 OR 3)

Order #	Field Name	Filter Type	Value	
1	Status	In	Open X Scheduled X	✕
2	Quantity To Order	Greater Than	<input type="text"/> 0	✕

Purchasing Assistant - Missed Allocations

Concept - This list should be maintained as close to zero items as possible. This list shows completed or pending approval work tickets that have remaining or unallocated materials.

Action – If work ticket was completed prematurely, uncomplete the work ticket. If the remaining materials will not be used, select item(s) and remove from list. If items were used from inventory, but not recorded, select item(s) and allocated from inventory.

[Advanced Search | Missed Allocations](#)

Order #	Field Name	Filter Type	Value	
1	Status	In	Complete X Pending Approval X	X
2	Quantity To Order	Greater Than	0	X

Purchase Receipts – Aging Purchase Receipts

Concept – This list shows purchase receipts that could potentially be received. Ok if not received as long as the order is still relevant and/or not picked up.

Action – Leave be if the purchase order is still pending receipt. If materials are in possession, receive the receipt. If the receipt is no longer relevant, delete the receipt.

[Advanced Search | Aging Purchase Receipts](#)

Order #	Field Name	Filter Type	Value	
1	Created Date	Through Last Week		X
2	Receipt Status Name	In	New X	X