

# Exception Analysis

Last Modified on 06/23/2023 12:13 pm EDT

Pathway: Sales > Exception Analysis

The Exception Analysis screen is used for internal sales purposes to review accounts that have had repeated service exceptions and identify if a new service, or change in service, should be offered.

EXCEPTION ANALYSIS						SALES > EXCEPTION ANALYSIS
DIVISION	All	PERIOD	Last 120 Days	SALES REP	All	LOAD
						Search
SITE	SALES REP	EXCEPTION COUNT	OPEN LEADS	OPEN PROPOSALS		
John Doe ( 27050001)	House Acct non System	2	6	1		
T.D.C.J. - PLANE UNIT ( 26509001)	House Account	3	0	0		
STATUS	REASON	DATE	WORK ORDER #	QTY	SERVICE CODE	
Service Completed	Blocked	03/08/2023	5495267	1	40 Yard Open Top Service	
Service Completed	Box Left in Yard	03/29/2023	5595906	1	40 Yard Open Top Service	
Service Completed	Roll Off Overloaded	03/31/2023	5608461	1	40 Yard Open Top Service	
Jack and Hammer Builders ( 42762003)	House Account	1	1	1		
FIRE PROTECTIVE SERVICES ( 33003001)	Rob Tellez	1	0	0		
Navu Distributing ( 42762002)	Rob Tellez	1	2	0		

## Required Permissions

The following permission(s) are required to view and use the Exception Analysis screen:

Permission ID	Permission Name
447	View Exception Analysis

## Logic

- Work Status must be 'Completed' and include an Exception Reason.
- 'Open Leads' only includes leads with a service identified.
- 'Open Proposals' only includes proposals with a service identified.

## Fields and Descriptions

Field	Description
<b>Filter Fields</b>	
Division	Filters to only load the screen with accounts/sites of the selected division.
Period	Filters to only load services based on the work order's Scheduled Date.
Sales Rep	Filters to only display sites belonging to the selected sales rep.
Load	Loads the screen based on the filter parameters set.
<b>Result Fields</b>	
Site	Displays the site name and site number the service is from.
Sales Rep	Displays the name of the sales rep assigned to the account.

<b>Exception Count</b>	Displays the total count of service exceptions for a site based on the filter period selected.
<b>Open Leads</b>	Displays the total count of open leads with a service attached.
<b>Open Proposals</b>	Displays the total count of open proposals with a service attached.
<b>Service Information</b>	
<b>Status</b>	Displays the Work Status from the work order for the displayed service.
<b>Reason</b>	Displays the Exception Reason from the work order for the displayed service.
<b>Date</b>	Displays the Scheduled Date from the work order for the displayed service.
<b>Work Order #</b>	Click to open the work order for the service.
<b>Qty</b>	Displays the Qty identified in the work order.
<b>Service Code</b>	Displays the Service Code identified in the work order.
<b>Photo (not displayed)</b>	Displays a total count of photos attached to the service record for the service. To view the photo(s), click on the work order to open the Service Record and then select the Photos tab.

## Functionality and Use

**Pathway:** *Accounts > Customer Details - Lead (Green + icon drop down)*

Upon evaluating the findings from the Exception Analysis screen and determining the need for a service change for a specific site, select the site ID to open the site and add a lead. When adding the lead, select 'Exception Analysis' as the Lead Source. Optional: include a note with the lead to provide more detailed information regarding the proposed service change.

ADD LEAD

**LEAD SOURCE**  
 Exception Analysis

**LEAD REASON**

**LEAD PROVIDED BY**  
 Aliena Somers Jun 22,2023 03:06 pm

**QUANTITY**  
 1

**EQUIPMENT**  
 40 Yard Roll Off

**SERVICE CODE**  
 40 Yard Open Top Service

**FREQUENCY**  
 1x per week

**PER UNIT**  
 0.00

**SVC FEES**  
 0.00

month

**CURRENT PROVIDER**

**CONTRACT EXPIRATION DATE**

**NOTE**  
 Propose going from an on-call service to a frequency of 1x per week.

