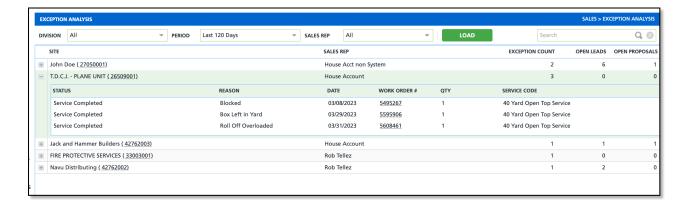# Exception Analysis

Last Modified on 10/01/2025 9:48 am PDT

Pathway: *Sales > Exception Analysis*

The Exception Analysis screen allows internal sales teams to review accounts with repeated service exceptions and determine whether to offer a new service or modify the current service, such as increasing the bin size or adjusting service frequency.

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
Filter Fields	
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.
Result Fields	
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.
Exception Count	Displays the total count of service exceptions for a site based on the filter period selected.
Open Leads	Displays the total count of open leads with a service attached.
Open Proposals	Displays the total count of open proposals with a service attached.
Service Information	
Status	Displays the Work Status from the work order for the displayed service.
Reason	Displays the Exception Reason from the work order for the displayed service.
Date	Displays the Scheduled Date from the work order for the displayed service.
Work Order #	Click to open the work order for the service.
Qty	Displays the Qty identified in the work order.
Service Code	Displays the Service Code identified in the work order.
Photo (not displayed)	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	EQUIPMENT			SERVICE CODE	FREQUENCY	PER UNIT	SVC FEES	
1	40 Yard Roll Off	⚙		40 Yard Open Top Service	1x per week	0.00	0.00	month

CURRENT PROVIDER

CONTRACT EXPIRATION DATE

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