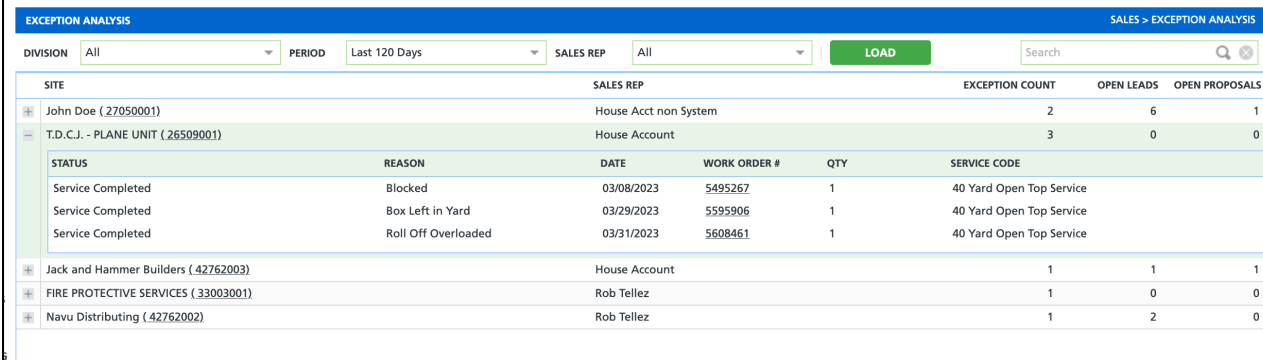


Exception Analysis - New Screen Available (15270) [Enhancement]

Last Modified on 06/23/2023 12:22 pm EDT

A new screen 'Exception Analysis' has been added to the Sales module in Core. Exception Analysis 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.

Follow the Exception Analysis article linked below for more information on how to use this new feature.



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					

Pathway: Sales > Exception Analysis

Article Link: [Exception Analysis](#)