SOLUTIONS360
business.managed

Q360 Workflows Reference

SOLUTIONS360
business.managed

Table of Contents

Table of Contents **2**

Workflow: Sales Overview **9**

Bucket: Sales Forecast 11

Bucket: Sales Funnel 12

Bucket: Sales Activities this Month 13

Bucket: Sales Bookings this Month 15

Bucket: Sales Dashboard 16

Bucket: Sales Opp Labor Conversion 17

Bucket: Count of Dataentry Quotes 19

Bucket: Count of Confirmed Quotes 21

Bucket: Count of Authorized Customer Quotes 23

Bucket: Count of Authorized Prospect Quotes 25

Bucket: Count of Submitted Quotes (ApproveQ) 27

Bucket: Count of Quotes Converted to Confirmed Orders 29

Bucket: Approved Orders 31

Bucket: Count of Rejected Quotes 33

Workflow: My Sales **35**

Bucket: My Prospects 36

Bucket: My Customers 38

Bucket: My Sales Forecast 40

Bucket: My Activities This Month 41

Bucket: My Sales Bookings 43

Bucket: My Sales Queue 44

Bucket: Count of My Dataentry Quotes 45

Bucket: Count of My Confirmed Quotes 47

Bucket: Count of My Authorized Customer Quotes 49

Bucket: Count of My Authorized Prospect Quotes 51

Bucket: Count of My Submitted Quotes (ApproveQ) 53

Bucket: Count of My Quotes Converted to Confirmed Orders 55

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Approved Orders 57
Bucket: Count of My Rejected Quotes 59
Workflow: Engineering 61
Bucket: Count of Requested Presales Design/Eng 62
Bucket: Count of Assigned Presales Design/Eng 65
Bucket: Count of Overdue Presales Design/Eng 68
Bucket: Count of Requested Project Design/Eng 70
Bucket: Count of Assigned Project Design/Eng 72
Bucket: Count of Overdue Project Design/Eng 74
Workflow: Projects Overview 76
Bucket: Count of Projects with No PM 78
Bucket: Count of Dataentry Projects 81
Bucket: Count of Active Projects 84
Bucket: Count of Substantially Completed Projects 87
Bucket: Count of Projects in Accounting Closeout 90
Bucket: Count of CCO Quotes 93
Bucket: Count of CCO Orders Pending Approval 96
Bucket: Count of ICO Orders Pending Approval 99
Bucket: Count of Upcoming Invoicing Tasks this Month 102
Bucket: Count of Overdue Invoicing Tasks 105
Bucket: Count of Overdue Projects 108
Bucket: Count of Over Budget Projects 111
Bucket: Count of Over Budget Tasks 113
Bucket: Count of Overdue Tasks 116
Bucket: Count of Due This Week 119
Bucket: Count of Due Next Week 122
Bucket: Count of Due Week After 125
Bucket: Count of POs No ETA (Past 48 Hrs) 128
Bucket: Count of Overdue POs 131
Bucket: Count of POs ETA Past Requested 134
Bucket: Count of Equipment Available 137
Bucket: Count of Unreviewed Project Events 139

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Projects Status 141
Bucket: Time Billing Summary 142
Bucket: Projects Console 143
Bucket: Resource Console 144
Workflow: My Projects 145
Bucket: Count of My Dataentry Projects 147
Bucket: Count of My Active Projects 149
Bucket: Count of My Substantially Completed Projects 151
Bucket: Count of My Projects In Accounting Closeout 153
Bucket: Count of Open CCO Quotes 155
Bucket: Count of CCO Orders Pending Approval 157
Bucket: Count of ICO Orders Pending Approval 159
Bucket: Count of Expenses to Approve 161
Bucket: Count of Overdue Projects 164
Bucket: Count of Tasks Over Budget 166
Bucket: Count of Tasks Overdue 168
Bucket: Count of Due This Week 170
Bucket: Count of Due Next Week 172
Bucket: Count of Due Week After 174
Bucket: Count of POs No ETA (Past 48 Hrs) 176
Bucket: Count of Overdue POs 178
Bucket: Count of POs ETA Past Request 180
Bucket: Count of Equipment Available 182
Bucket: Count of Unreviewed Project Events 184
Bucket: Resource Console 186
Bucket: My Projects Status 187
Bucket: Task Console 188
Workflow: Service Overview 189
Bucket: Email Q 191
Bucket: Dispatch Q 192
Bucket: Count of Open Calls 193
Bucket: Count of Scheduled Calls 196

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Dispatched Calls 199
Bucket: Events Q 202
Bucket: Count of Tech Done Calls 203
Bucket: Count of Completed Calls 206
Bucket: Count of Calls Open Too Long 209
Bucket: Count of New Calls To Schedule 212
Bucket: Count of Return Visit To Schedule 215
Bucket: Count of Calls Waiting Parts 218
Bucket: Count of Calls Needing Quotes 221
Bucket: Count of Incomplete Calls 224
Bucket: Closed Calls 227
Bucket: Count of Calls On Hold 230
Bucket: Count of Calls Pending Customer 233
Bucket: Count of Substantially Completed Projects 236
Bucket: Active Service Contracts 239
Bucket: Count of Expiring Service Contracts 243
Bucket: Count of Vendor Service Contract Renewal Q 246
Bucket: Count of Calls with No Activity 1 Hour 249
Bucket: Count of Calls with No Activity 4 Hours 252
Bucket: Count of Calls with No Activity 24 Hours 255
Bucket: Count of Calls with No Activity 48 Hours 258
Bucket: Count of SLA Response Violation within 240 Minutes 261
Bucket: Count of SLA Response Violation within 120 Minutes 264
Bucket: Count of SLA Response Violation within 60 Minutes 267
Bucket: Count of SLA Response Violation OVERDUE 270
Bucket: Count of SLA Resolve Violation within 240 Minutes 273
Bucket: Count of SLA Resolve Violation within 120 Minutes 276
Bucket: Count of SLA Resolve Violation within 60 Minutes 279
Bucket: Count of SLA Resolve Violation OVERDUE 282
Workflow: My Calls 285
Bucket: Count of New Calls 287
Bucket: Count of Work In Progress 289

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Tech Done 292
Bucket: Count of Completed Calls 294
Bucket: Count of Open Calls > 1 hr 296
Bucket: Count of Open Calls > 3 hrs 299
Bucket: Count of Calls Waiting Parts 302
Bucket: Count of Calls Waiting Parts > 3 days 305
Bucket: Count of Calls w/ No Activity > 24 hrs 308
Bucket: Count of Calls w/ No Activity > 48 hrs 311
Workflow: Purchasing 314
Bucket: Count of Items to Purchase 316
Bucket: Count of Items to Re-order 319
Bucket: Count of POs to Confirm 321
Bucket: Count of POs to Receive 323
Bucket: Count of No ETA Past 48hrs 325
Bucket: Count of ETA Overdue 327
Bucket: Count of ETA Past Req. Date 329
Bucket: Count of Unverified Quote Items 331
Bucket: Count of Unverified Order Items 332
Bucket: Count of Unreceived PO Items Change-Ordered Out 333
Bucket: Count of Missed Project PO 335
Bucket: Count of RMA Test Q 337
Bucket: Count of Vendor Service Contract Renewal Q 339
Bucket: Find Product 341
Bucket: On Hand Inventory 342
Bucket: Purchases by Master 345
Bucket: Manufacturer Sales Forecast 347
Workflow: Warehouse 349
Bucket: Count of POs to Receive 350
Bucket: Count of Items to Pick 352
Bucket: Count of Items to Ship 355
Bucket: Count of Internally Shipped Items 357
Bucket: Count of RMA to Receive 359

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of RMA to Test 361
Bucket: Count of PO ETA Today and Older 363
Bucket: Count of PO ETA Past Requested 365
Bucket: Find Product 367
Bucket: Transfer Inventory 368
Bucket: Inventory Count 369
Bucket: On Hand Inventory 370
Bucket: Tech Returns 373
Bucket: Return to Vendor 374
Bucket: Count of Vendor RMA Q 375
Workflow: Accounts Receivable 377
Bucket: Count of Upcoming Projects to Invoice This Month 378
Bucket: Count of Projects to Invoice 381
Bucket: Count of Calls to Invoice 384
Bucket: Count of Shipped Orders to Invoice 387
Bucket: Bill Service Contracts 389
Bucket: Count of Invoices to Print 390
Bucket: Count of Aged AR 393
Bucket: Cash Receipts 398
Bucket: Count of Projects to Close 399
Workflow: Accounts Payable 402
Bucket: Count of Received POs to Voucher 403
Bucket: Count of Drop-shipped POs to Receive 405
Bucket: Generate Recurring Vouchers 408
Bucket: Count of Un-Posted / Un-Released Vouchers 409
Bucket: Checks To Print 411
Bucket: Direct Payments 413
Bucket: Count of Aged AP 414
Workflow: HR 418
Bucket: Count of Active Employees 419
Bucket: Count of Activities to Follow Up 421
Bucket: Count of Skills Expiring in 30 Days 423

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Skills Expiring in 30 to 60 Days 425
Bucket: Count of Expired Skills 427
Bucket: Count of Upcoming Reviews in 30 Days 429
Bucket: Count of Upcoming Reviews in 30 to 60 Days 431
Bucket: Time Bill Approval 433
Bucket: Vacation Schedule 434

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Sales Overview

Path: Workflow > Sales Overview
Workflow No: 360Q723345

Purpose

The purpose of the Sales Overview workflow is to provide a comprehensive, at-a-glance dashboard of the entire sales pipeline and key sales activities. It allows sales managers and representatives to track the progress of quotes through various stages, monitor conversion to orders, access sales forecasts and performance dashboards, and review sales-related activities and labor conversion efficiency.

Benefits

- Provides a centralized, real-time view of the entire sales process from quote creation to order approval.
- Enables effective tracking of sales quotes as they progress through data entry, confirmation, authorization, and submission stages.
- Monitors the conversion of quotes to confirmed orders, highlighting sales performance.
- Offers quick access to sales forecasting tools and dashboards for better strategic planning.
- Facilitates the identification of bottlenecks or delays in the sales cycle by visualizing quote statuses.
- Helps in understanding sales team activities and their association with opportunities.
- Supports analysis of labor conversion from sales opportunities to projects, aiding in estimation accuracy.
- Improves sales team accountability by providing clear visibility into their pipeline and activities.
- Allows for filtering of sales data by company, branch, salesperson, sale type, department, and customer for targeted analysis.
- Enhances decision-making for sales strategies through consolidated data and easy drill-down capabilities.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Caption	Description	Type	Options	Default
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Forecast

The purpose of the Sales Forecast bucket is to provide direct access to the sales forecasting tools or reports within Q360. Clicking this bucket allows users to view projected sales revenues and opportunity pipelines, aiding in financial planning and sales strategy.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Forecast
- **Parameters Passed:**
  - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'All'.
  - The 'salesrep' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
  - The 'probability' parameter of the target form is set using the current value of the workflow filter 'ProbMin'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Funnel

The purpose of the Sales Funnel bucket is to provide a direct link to a visual representation of the sales funnel. This allows users to see the distribution of sales opportunities across various stages of the sales process, from initial lead to closed deal, helping to identify progression and potential blockages.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Funnel
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'funneldefno' parameter of the target form is set using the current value of the workflow filter 'All'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Activities this Month

The purpose of the Sales Activities this Month bucket is to display sales-related activities that have been recorded within the current month. This provides users, particularly sales managers, with insights into the sales team's efforts, such as calls, meetings, and follow-ups associated with opportunities.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters activities for today's date range (start and end of today), as per the underlying report's default parameters when not overridden by a workflow filter.
Constant Filter	Includes all customer subtypes, as per the underlying report's default parameters.
Inclusion	Includes activities that are specifically created from or associated with sales opportunities.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0015).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0015)

The data for this bucket is sourced from Report No: **Activities by Sales Rep - Sales Opp Only** (Q0015). This report lists sales activities linked to opportunities, filtered by a date range (defaulting to today if not otherwise specified by workflow mappings) and salesperson. It provides details such as activity type, associated company and contact, activity title, and comments. Primarily used to track sales efforts related to specific opportunities.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Activity form for the respective activity.
Activity No.	The unique identifier for the sales activity.
Sales Rep	The salesperson associated with the activity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Contact	The contact person linked to the activity.
Customer No.	The customer account number linked to the activity.
Company Name	The name of the company associated with the activity. Sourced from Customer information.
Date	The date on which the activity occurred or is scheduled.
Title	The title or subject line of the activity.
Activity Type	The type or classification of the sales activity (e.g., Call, Meeting, Email).
Comment	Additional notes, details, or comments recorded for the activity.

Default Sorting

The Activities by Sales Rep - Sales Opp Only is ordered by default in the following manner:

#	Column	Method
1	Sales Rep	Ascending
2	Date	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Bookings this Month

The purpose of the Sales Bookings this Month bucket is to provide users with quick access to a report or view detailing all sales orders that have been officially booked or confirmed, specifically within the current month. This allows for timely monitoring of achieved sales targets and recent booking trends.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Bookings
- **Parameters Passed:**
    - The 'saletype' parameter of the target form is set using the current value of the workflow filter 'Sale Type'.
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'salesperson' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
    - The 'startdate' parameter of the target form is set using the current value of the workflow filter 'First Day of Month'.
    - The 'enddate' parameter of the target form is set using the current value of the workflow filter 'Today'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Dashboard

The purpose of the Sales Dashboard bucket is to provide a quick link to the main Sales Dashboard (identified as Q0249). This dashboard offers a high-level, visual summary of key salesperson's metrics, quotas, and trends, enabling a salesperson to catch up on current opportunities and quickly assess sales performance.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Dashboard: Sales Dashboard (Q0249)
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Sales Opp Labor Conversion

The purpose of the Sales Opp Labor Conversion bucket is to provide access to a report (Q0066) that analyzes the conversion of labor estimated in sales opportunities against the actual labor costs incurred on projects that originated from those opportunities. This helps in evaluating the cost of pre-sales labor.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for opportunities within today's date range (start and end of today), as per the underlying report's default date parameters when not overridden by a workflow filter.
Constant Filter	Includes opportunities based on the default Won/Lost status (e.g., 'ALL') as per the underlying report logic if not mapped from workflow filters.
Inclusion	Labor costs are derived either from standard master costs or posted actual costs from time bills and general ledger journals, depending on the 'Cost Type' parameter. Only labor and burden job cost types are included for project costs.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0066).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0066)

The data for this bucket is sourced from Report No: **Sales Opportunity Labor Conversion** (Q0066). This report estimates labor incurred during the sales opportunity. It compares pre-sales labor hours/costs with actual project labor hours/costs, showing deltas. It can be filtered by date range (defaulting to today if not mapped), branch, sales rep, cost type (standard vs. posted), and opportunity won/lost status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Opportunity form for the respective opportunity.
Branch	The branch associated with the opportunity or the resulting project.
Sales Rep	The salesperson credited for the opportunity.
Interest	The type or level of interest indicated for the sales opportunity.
Customer No.	The unique identifier for the customer associated with the opportunity.
Company Name	The name of the customer company. Sourced from Customer information.
Opportunity No.	The unique identifier for the sales opportunity.
Opportunity Title	The descriptive title of the sales opportunity.
Probability %	The estimated likelihood (percentage) of winning the opportunity.
Won/Lost Code	The code indicating the final status of the opportunity (e.g., WON, LOST, ACTIVE).
Opportunity Value	The total estimated monetary value of the sales opportunity.
Total Opp. Hours	The total pre-sales labor hours recorded against the opportunity across its entire lifecycle.
Total Opp. Cost	The total pre-sales labor cost recorded against the opportunity across its entire lifecycle, calculated based on the selected 'Cost Type' parameter (Standard or Posted).
Delta Hours (Opp)	The pre-sales labor hours recorded against the opportunity specifically within the date range defined by the report's filters.
Delta Cost (Opp)	The pre-sales labor cost recorded against the opportunity specifically within the date range defined by the report's filters, calculated based on the selected 'Cost Type' parameter.
Project No.	The unique identifier of the project that was created if the opportunity was won and converted.
Project Start Date	The official start date of the associated project.
Project Status	The current operational status of the associated project.
Project Title	The descriptive title of the associated project.

Default Sorting

The Sales Opportunity Labor Conversion is ordered by default in the following manner:

#	Column	Method
1	List (Opportunity Cost List)	Ascending
2	Won/Lost Code	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Dataentry Quotes

The purpose of the Count of Dataentry Quotes bucket is to display the total number of sales quotes that are currently in the 'DATAENTRY' status. These are quotes that are actively being created or modified by the sales team and have not yet been finalized or submitted for internal review and confirmation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'DATAENTRY'.
Constant Filter	Includes quotes regardless of the customer's specific type (e.g., PROSPECT, CUSTOMER).
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Quote Data Entry Queue
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Confirmed Quotes

The purpose of the Count of Confirmed Quotes bucket is to display the total number of sales quotes that have been finalized by the sales team and are currently in 'CONFIRMED' status. These quotes are awaiting internal review and authorization before they can be submitted to the customer or prospect.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'CONFIRMED'.
Constant Filter	Includes quotes regardless of the customer's specific type (e.g., PROSPECT, CUSTOMER).
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Authorized Customer Quotes

The purpose of the Count of Authorized Customer Quotes bucket is to show the total number of sales quotes that have received internal authorization and are specifically designated for existing customers (companies with a 'CUSTOMER' or 'CUSTVEND' type). These quotes are ready to be submitted to these customers for their review and approval.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'AUTHORIZED'.
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Filters for quotes linked to customers identified as 'CUSTOMER' or 'CUSTVEND'.
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Authorized Prospect Quotes

The purpose of the Count of Authorized Prospect Quotes bucket is to display the total number of sales quotes that have received internal authorization and are specifically designated for prospects (companies with a 'PROSPECT' type). These quotes are ready to be submitted to these potential customers for their review and consideration.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'AUTHORIZED'.
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Filters for quotes linked to customers identified as 'PROSPECT'.
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Submitted Quotes (ApproveQ)

The purpose of the Count of Submitted Quotes (ApproveQ) bucket is to show the total number of sales quotes that have been formally submitted to customers or prospects and are currently awaiting their approval. These quotes are in the 'APPROVEQ' status.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'APPROVEQ'.
Constant Filter	Includes quotes regardless of the customer's specific type (e.g., PROSPECT, CUSTOMER).
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Quotes Converted to Confirmed Orders

The purpose of the Count of Quotes Converted to Confirmed Orders bucket is to display the total number of sales quotes that have been approved by the customer and subsequently converted into orders with a 'CONFIRMED' status. These orders are awaiting final internal approval before they become active and proceed to fulfillment or project initiation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for orders with status 'CONFIRMED'.
Constant Filter	Excludes orders that do not have an assigned status code.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0119).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0119)

The data for this bucket is sourced from Report No: **WF_Queue_Order_List** (Q0119). The Queue_Order_List procedure retrieves a list of orders based on various filter criteria such as company, salesperson, order status, branch, department, customer, and sale type. This report is used to populate workflow queues showing orders at different stages.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Order form for the respective order.
Order No.	The unique identifier for the order.
Entity No.	The identifier of the company (entity) to which the order belongs.
Title	The descriptive title of the order.
Order Date	The date on which the order was created.
Customer Name	The name of the customer for whom this order is placed. Sourced from Customer information.
Ship To	The company name designated as the shipping recipient for this order.
Contact	The name of the primary contact person associated with the order.
Sale Type	Order sale type.
Order Type	The specific type of the order document, for example, SALE (standard sale order) or CCO (Customer Change Order).
Branch	The specific branch of the organization that is associated with the order.
Department	The department within the organization that is responsible for or associated with the order.
Service Call No.	The associated service call number if the order originated from or is linked to a service call.
Status Code	The current operational status of the order within the workflow (e.g., CONFIRMED, APPROVED).
Currency	The currency in which the monetary values on the order are expressed.
Amount	The total monetary value of the order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Approved Orders

The purpose of the Approved Orders bucket is to list all sales orders that have received final internal approval and are now active. These orders are ready to proceed to the next stage, such as project initiation, material procurement, or service delivery. This bucket does not display a count, but provides direct access to the list of these orders.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Sale Type	User-selectable. Filters orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for orders with status 'APPROVED'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0119).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0119)

The data for this bucket is sourced from Report No: **WF_Queue_Order_List** (Q0119). The Queue_Order_List procedure retrieves a list of orders based on various filter criteria such as company, salesperson, order status, branch, department, customer, and sale type. This report is used to populate workflow queues showing orders at different stages.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Order form for the respective order.
Order No.	The unique identifier for the order.
Entity No.	The identifier of the company (entity) to which the order belongs.
Title	The descriptive title of the order.
Order Date	The date on which the order was created.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Customer Name	The name of the customer for whom this order is placed. Sourced from Customer information.
Ship To	The company name designated as the shipping recipient for this order.
Contact	The name of the primary contact person associated with the order.
Sale Type	Order sale type.
Order Type	The specific type of the order document, for example, SALE (standard sale order) or CCO (Customer Change Order).
Branch	The specific branch of the organization that is associated with the order.
Department	The department within the organization that is responsible for or associated with the order.
Service Call No.	The associated service call number if the order originated from or is linked to a service call.
Status Code	The current operational status of the order within the workflow (e.g., CONFIRMED, APPROVED).
Currency	The currency in which the monetary values on the order are expressed.
Amount	The total monetary value of the order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Rejected Quotes

The purpose of the Count of Rejected Quotes bucket is to display the total number of sales quotes that have been marked with a 'REJECTED' status. This can occur if a quote is declined internally during the review process or if it is rejected by the customer or prospect after submission.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters workflow data by a specific company/entity. Users can select an entity to view sales overview data pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch. Users can select a branch or "ALL" branches to view relevant sales data.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific Salesperson. Users can select a sales rep or "ALL" to view their sales performance and activities.	User		ALL
Sale Type	User-selectable. Filters quotes and orders based on their Sale Type. Users can select one or more sale types to narrow down the view.	General Code: UNIFIEDTYP		ALL
Department	User-selectable. Filters workflow data by a specific department. Users can select a department or "ALL" to view sales data associated with that department.	List		ALL
Customer	User-selectable. Filters workflow data by one or more specific customers. Useful for analyzing sales activities and pipeline for a particular customer.	Company Lookup		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes with status 'REJECTED'.
Constant Filter	Includes quotes regardless of the customer's specific type (e.g., PROSPECT, CUSTOMER).
Constant Filter	Includes quotes regardless of the customer's specific status (e.g., ACTIVE, INACTIVE).
Constant Filter	Excludes quotes that do not have an assigned customer type.
Constant Filter	Excludes quotes that do not have an assigned status code.
Constant Filter	Excludes quotes linked to customers without a defined status.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report retrieves a list of sales quotes based on a variety of filter criteria. These criteria include the associated company entity, salesperson, specific quote statuses (both to include and exclude), branch, department, customer, sale type, customer status, customer type, and principle. This report is designed to populate workflow buckets or queues that display quotes at different stages within the sales pipeline. A key exclusion applied by this report is that it does not include quotes identified as 'QUICKLIST', which are typically used as templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the respective quote.
Quote No.	The unique identifier for the sales quote.
Entity No.	The identifier of the company (entity) to which the quote belongs.
Title	The descriptive title of the quote.
Quote Date	The date on which the quote was created or last modified.
Customer Name	The name of the customer or prospect for whom the quote has been prepared.
Ship To	The company name designated as the shipping recipient for the goods or services in the quote.
Contact	The name of the primary contact person associated with the quote.
Sale Type	Quote sale type.
Quote Type	The specific type of the quote document, for example, SALE (standard sale quote) or CCO (Customer Change Order). This column explicitly excludes 'QUICKLIST' (template) quotes.
Branch	The specific branch of the organization that is associated with the quote.
Department	The department within the organization that is responsible for or associated with the quote.
Sales Rep 1	The primary salesperson assigned to this quote.
Sales Rep 2	The secondary salesperson assigned to this quote, if applicable.
Status Code	The current operational status of the quote within the sales workflow (e.g., DATAENTRY, CONFIRMED, AUTHORIZED).
Currency	The currency in which the monetary values on the quote are expressed.
Amount	The total monetary value of the quote.
Customer Status	The current active status of the customer associated with the quote (e.g., ACTIVE, INACTIVE, CREDITHOLD).
Customer Type	The classification of the company associated with the quote (e.g., CUSTOMER, PROSPECT).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: My Sales

Path: Workflow > My Sales
Workflow No: 360Q957082

Purpose

The purpose of the My Sales workflow is to provide salespersonnel with a comprehensive overview of their sales pipeline, from prospecting and quoting to order conversion and activity management, enabling them to efficiently manage their sales tasks and monitor their performance.

Benefits

- Centralized view of individual sales activities and performance.
- Streamlined quote management process, from data entry to customer approval.
- Improved tracking of sales opportunities and forecast accuracy.
- Enhanced visibility into sales bookings and order status.
- Efficient management of customer and prospect interactions.
- Quick access to key sales-related reports and queues.
- Proactive identification of quotes requiring attention (e.g., rejected, submitted to customer).
- Facilitates timely follow-up on sales activities and customer communications.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Prospects

The purpose of the My Prospects bucket is to display a list of potential customers (prospects) assigned to the salesperson, facilitating easy access to their details for follow-up and engagement.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to companies of type 'PROSPECT'.
Constant Filter	Filters for companies assigned to the current salesperson.
Constant Filter	Restricted to companies with 'ACTIVE' status, as per the default behavior of the underlying report when no specific status is passed.
Constant Filter	Includes data from all departments by default.
Constant Filter	Includes data for all customers by default (no specific customer filter applied).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0110).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0110)

The data for this bucket is sourced from Report No: **WF_Queue_Company_List** (Q0110). This report returns a list of companies (customers or prospects) based on specified filters such as company number, type (e.g., PROSPECT, CUSTOMER), salesperson, branch, department, and status. It is used to populate queues or lists within workflows, providing users with a targeted set of company records. For this bucket, it specifically lists active prospects for the current salesperson.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Company record.
Customer No	The unique number assigned to the company.
Company	The name of the company.
Address1	The first line of the company's primary address.
Address2	The second line of the company's primary address.
City	The city of the company's primary address.
State	The state or province of the company's primary address.
Zip	The postal code of the company's primary address.
Phone	The primary phone number of the company.
Fax	The primary fax number of the company.
Website	The company's website address.
Type	The classification of the company. For this bucket, this is filtered to 'PROSPECT'.
Salesrep	The primary salesperson assigned to the company. For this bucket, this is filtered to the current user.
Salesrep2	The secondary salesperson assigned to the company, if any.
Branch	The branch associated with the company.
Rep1 Dept.	The department associated with the primary salesperson. Derived from User ID information.
Rep2 Dept.	The department associated with the secondary salesperson, if one is assigned. Derived from User ID information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Customers

The purpose of the My Customers bucket is to display a list of active, existing customers assigned to the salesperson, providing quick access to their information for relationship management and sales activities.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for companies assigned to the current salesperson.
Constant Filter	Restricted to companies of type 'CUSTOMER' or 'CUSTVEND'.
Constant Filter	Restricted to companies with 'ACTIVE' status, as per the default behavior of the underlying report when no specific status is passed.
Constant Filter	Includes data from all departments by default.
Constant Filter	Includes data for all customers by default (no specific customer filter applied).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0110).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0110)

The data for this bucket is sourced from Report No: **WF_Queue_Company_List** (Q0110). This report returns a list of companies based on specified filters. For this bucket, it specifically lists active customers (type 'CUSTOMER' or 'CUSTVEND') for the current salesperson.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Company record.
Customer No	The unique number assigned to the company.
Company	The name of the company.
Address1	The first line of the company's primary address.
Address2	The second line of the company's primary address.
City	The city of the company's primary address.
State	The state or province of the company's primary address.
Zip	The postal code of the company's primary address.
Phone	The primary phone number of the company.
Fax	The primary fax number of the company.
Website	The company's website address.
Type	The classification of the company. For this bucket, this is filtered to 'CUSTOMER' or 'CUSTVEND'.
Salesrep	The primary salesperson assigned to the company. For this bucket, this is filtered to the current user.
Salesrep2	The secondary salesperson assigned to the company, if any.
Branch	The branch associated with the company.
Rep1 Dept.	The department associated with the primary salesperson. Derived from User ID information.
Rep2 Dept.	The department associated with the secondary salesperson, if one is assigned. Derived from User ID information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Sales Forecast

The purpose of the My Sales Forecast bucket is to provide a quick link to the Sales Forecast screen, enabling salespersons to review and manage their sales pipeline and forecasted opportunities.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Forecast
- **Parameters Passed:**
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'salesrep' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
  - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
  - The 'probability' parameter of the target form is set using the current value of the workflow filter 'ProbMin'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Activities This Month

The purpose of the My Activities This Month bucket is to display a list of sales activities scheduled or completed by the salesperson within the current month, specifically those linked to sales opportunities. This helps in tracking engagement and follow-ups.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters activities for the current logged-in salesperson.
Constant Filter	Filters activities to include those with a date from the first day of the current month up to today.
Constant Filter	Filters activities for all customer subtypes by default.
Inclusion	Includes activities that are linked to sales-relevant records such as contacts, customers, opportunity funnel items, opportunities, invoices, or sites related to opportunities.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0015).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0015)

The data for this bucket is sourced from Report No: **Activities by Sales Rep - Sales Opp Only** (Q0015). This report lists activities associated with sales opportunities for a specified salesperson and date range. It helps track interactions, follow-ups, and progress related to sales opportunities by showing activity details like type, associated company, contact, and comments. The data is primarily sourced from the Activity information and linked Customer information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Activity record.
Activity No	The unique identifier for the activity.
Sales Rep	The salesperson associated with the activity. For this bucket, it is filtered to the current user.
Contact	The name of the contact associated with the activity.
Customer No	The unique number of the customer associated with the activity.
Company	The name of the company (customer) associated with the activity. Provides a zoom to the customer record.
Date	The date of the activity. For this bucket, filtered from the start of the current month to today.
Title	The title or subject of the activity.
Activity Type	The type of the activity (e.g., Call, Meeting, Email).
Comment	Additional comments or notes recorded for the activity.

Default Sorting

The Activities by Sales Rep - Sales Opp Only report is ordered by default in the following manner:

#	Column	Method
1	Sales Rep	Ascending
2	Date	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Sales Bookings

The purpose of the My Sales Bookings bucket is to provide a quick link to the Sales Bookings screen, allowing users to review orders that have been confirmed and booked within a specified period, typically the current month.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Bookings
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'salesperson' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.
  - The 'saletype' parameter of the target form is set using the current value of the workflow filter 'Sale Type'.
  - The 'startdate' parameter of the target form is set using the current value of the workflow filter 'First Day of Month'.
  - The 'enddate' parameter of the target form is set using the current value of the workflow filter 'Today'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Sales Queue

The purpose of the My Sales Queue bucket is to provide a direct link to the user's personalized Sales Queue, which aggregates various sales-related tasks and items requiring attention.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Sales Queue
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'salesrep' parameter of the target form is set using the current value of the workflow filter 'Sales Rep'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Dataentry Quotes

The purpose of the Count of My Dataentry Quotes bucket is to display the number of quotes assigned to the salesperson that are currently in the 'DATAENTRY' status, indicating they are still being built and require further action.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'DATAENTRY'.
Constant Filter	Includes quotes for all customer types and statuses by default, as specified by the 'ALL' and 'Blank' filter mappings.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default (mapped from workflow filter 'ALL' to report parameter 'Principle').
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria including company, salesperson, quote status, customer status, customer type, branch, department, sale type, and principle. It is designed to populate workflow queues related to quote management. For this bucket, it specifically lists quotes in 'DATAENTRY' status for the current salesperson, excluding template quotes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote (ContractNo from Quote table).
Entity No	The entity (company number) associated with the quote.
Title	The title or description of the quote.
Quote Date	The date the quote was created or last modified (ContractDate from Quote table).
Company	The name of the customer or prospect company for whom the quote is prepared.
Ship To	The company name designated for shipping.
Contact	The primary contact person for the quote.
Sale Type	The sale type associated with the quote (e.g., Project, Service).
Quote Type	The type of quote (ConType from Quote table, e.g., SALE, CCO). For this bucket, 'QUICKLIST' types are excluded by the report logic.
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson on the quote. For this bucket, filtered to the current user.
Sales Rep 2	The secondary salesperson on the quote, if any.
Status Code	The status of the quote. For this bucket, filtered to 'DATAENTRY'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Confirmed Quotes

The purpose of the Count of My Confirmed Quotes bucket is to display the number of quotes assigned to the salesperson that are in 'CONFIRMED' status, indicating they are awaiting internal authorization.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'CONFIRMED'.
Constant Filter	Includes quotes for all customer types and statuses by default.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria. For this bucket, it specifically lists quotes in 'CONFIRMED' status for the current salesperson, excluding template quotes.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote.
Entity No	The entity associated with the quote.
Title	The title of the quote.
Quote Date	The date of the quote.
Company	The customer company name.
Ship To	The shipping company name.
Contact	The contact person for the quote.
Sale Type	The sale type of the quote.
Quote Type	The type of quote (excluding 'QUICKLIST').
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson.
Sales Rep 2	The secondary salesperson.
Status Code	The status of the quote, filtered to 'CONFIRMED'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Authorized Customer Quotes

The purpose of the Count of My Authorized Customer Quotes bucket is to display the number of quotes for existing customers (not prospects) that have been internally authorized and are ready for submission, assigned to the salesperson.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'AUTHORIZED'.
Constant Filter	Restricted to quotes where the company type is 'CUSTOMER' or 'CUSTVEND'.
Constant Filter	Includes quotes for all customer statuses by default.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria. For this bucket, it specifically lists quotes in 'AUTHORIZED' status for existing customers, assigned to the current salesperson, excluding template quotes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote.
Entity No	The entity associated with the quote.
Title	The title of the quote.
Quote Date	The date of the quote.
Company	The customer company name (filtered to CUSTOMER/CUSTVEND types).
Ship To	The shipping company name.
Contact	The contact person for the quote.
Sale Type	The sale type of the quote.
Quote Type	The type of quote (excluding 'QUICKLIST').
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson.
Sales Rep 2	The secondary salesperson.
Status Code	The status of the quote, filtered to 'AUTHORIZED'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Authorized Prospect Quotes

The purpose of the Count of My Authorized Prospect Quotes bucket is to display the number of quotes for prospects (not existing customers) that have been internally authorized and are ready for submission, assigned to the salesperson.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'AUTHORIZED'.
Constant Filter	Restricted to quotes where the company type is 'PROSPECT'.
Constant Filter	Includes quotes for all customer statuses by default.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria. For this bucket, it specifically lists quotes in 'AUTHORIZED' status for prospects, assigned to the current salesperson, excluding template quotes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote.
Entity No	The entity associated with the quote.
Title	The title of the quote.
Quote Date	The date of the quote.
Company	The prospect company name (filtered to Prospect type).
Ship To	The shipping company name.
Contact	The contact person for the quote.
Sale Type	The sale type of the quote.
Quote Type	The type of quote (excluding 'QUICKLIST').
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson.
Sales Rep 2	The secondary salesperson.
Status Code	The status of the quote, filtered to 'AUTHORIZED'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Submitted Quotes (ApproveQ)

The purpose of the Count of My Submitted Quotes (ApproveQ) bucket is to display the number of quotes assigned to the salesperson that have been submitted to the customer and are awaiting their approval (status 'APPROVEQ').

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'APPROVEQ' (Submitted).
Constant Filter	Includes quotes for all customer types and statuses by default.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria. For this bucket, it specifically lists quotes in 'APPROVEQ' (Submitted) status for the current salesperson, excluding template quotes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote.
Entity No	The entity associated with the quote.
Title	The title of the quote.
Quote Date	The date of the quote.
Company	The customer or prospect company name.
Ship To	The shipping company name.
Contact	The contact person for the quote.
Sale Type	The sale type of the quote.
Quote Type	The type of quote (excluding 'QUICKLIST').
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson.
Sales Rep 2	The secondary salesperson.
Status Code	The status of the quote, filtered to 'APPROVEQ'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Quotes Converted to Confirmed Orders

The purpose of the Count of My Quotes Converted to Confirmed Orders bucket is to display the number of orders that originated from quotes approved by customers and are now in 'CONFIRMED' status (awaiting internal approval/processing), assigned to the salesperson.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for orders assigned to the current salesperson.
Constant Filter	Restricted to orders with a status of 'CONFIRMED'.
Constant Filter	Includes orders for all sale types by default.
Constant Filter	Includes orders for all departments by default.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0119).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0119)

The data for this bucket is sourced from Report No: **WF_Queue_Order_List** (Q0119). This report retrieves a list of orders based on criteria such as company, salesperson, status codes, branch, department, customer number, and sale type. For this bucket, it specifically lists orders in 'CONFIRMED' status assigned to the current salesperson.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Order record.
Order No	The unique identifier for the order.
Entity No	The entity (company number) associated with the order.
Title	The title or description of the order.
Order Date	The date the order was created.
Company	The name of the customer company for whom the order is placed.
Ship To	The company name designated for shipping.
Contact	The primary contact person for the order.
Sale Type	The sale type associated with the order (e.g., Project, Service).
Order Type	The type of order (ConType from Contract table, e.g., SALE, CCO).
Branch	The branch associated with the order.
Department	The department associated with the order.
Call No	The linked service call number, if applicable.
Status Code	The status of the order. For this bucket, filtered to 'CONFIRMED'.
Currency	The currency of the order.
Amount	The total amount of the order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Approved Orders

The purpose of the My Approved Orders bucket is to display a list of sales orders that have been approved and are assigned to the salesperson, providing visibility into confirmed sales ready for fulfillment.

Bucket Filters

The data for this bucket is sourced from Report Q0119 (Order List). However, due to a configuration mismatch where workflow filters defined for this bucket's live data source target a different report (Q0129), the user-selectable filters (Company, List) and the expected 'Approved' status filter are not effectively applied to the Order List (Q0119) for this bucket. The report Q0119 will execute using its internal default parameter values, which may not reflect the intended "My Approved Orders" view.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for orders assigned to the current salesperson.
Constant Filter	Restricted to orders with a status of 'APPROVED'.
Constant Filter	Includes orders for all sale types by default.
Constant Filter	Includes orders for all departments by default.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0119).
- **Parameters Passed:** None for Report Q0119 due to the configuration mismatch in LIVEDATA mappings.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0119)

The data for this bucket is sourced from Report No: **WF_Queue_Order_List** (Q0119). This report retrieves a list of orders based on criteria such as company, salesperson, status codes, branch, department, customer number, and sale type. It's typically used to populate workflow queues related to order processing. Due to the filter mapping issue mentioned above, the data displayed may not be filtered to 'APPROVED' status as intended by the bucket's caption.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Order record.
Order No	The unique identifier for the order.
Entity No	The entity associated with the order.
Title	The title of the order.
Order Date	The date of the order.
Company	The customer company name.
Ship To	The shipping company name.
Contact	The contact person for the order.
Sale Type	The sale type of the order.
Order Type	The type of order.
Branch	The branch associated with the order.
Department	The department associated with the order.
Call No	The linked service call number, if applicable.
Status Code	The status of the order.
Currency	The currency of the order.
Amount	The total amount of the order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Rejected Quotes

The purpose of the Count of My Rejected Quotes bucket is to display the number of quotes assigned to the salesperson that have been marked with 'REJECTED' status, typically indicating they were not approved internally or by the customer.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters the workflow data based on the selected financial entity. Allows users to focus on sales activities within a specific company (entity).	List		Current User's Company
Branch	User-selectable. Filters the workflow data based on the selected branch. Enables users to view sales performance and activities for specific branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for quotes assigned to the current salesperson.
Constant Filter	Restricted to quotes with a status of 'REJECTED'.
Constant Filter	Includes quotes for all customer types and statuses by default.
Constant Filter	Includes quotes for all sale types by default.
Constant Filter	Includes quotes for all departments by default.
Constant Filter	Includes quotes for all principles by default.
Exclusion	Excludes quotes that are designated as 'QUICKLIST'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0134).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0134)

The data for this bucket is sourced from Report No: **WF_Queue_Quote_List** (Q0134). This report returns a list of quotes based on various filter criteria. For this bucket, it specifically lists quotes in 'REJECTED' status for the current salesperson, excluding template quotes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Quote form.
Quote No	The unique identifier for the quote.
Entity No	The entity associated with the quote.
Title	The title of the quote.
Quote Date	The date of the quote.
Company	The customer or prospect company name.
Ship To	The shipping company name.
Contact	The contact person for the quote.
Sale Type	The sale type of the quote.
Quote Type	The type of quote (excluding 'QUICKLIST').
Branch	The branch associated with the quote.
Department	The department associated with the quote.
Sales Rep 1	The primary salesperson.
Sales Rep 2	The secondary salesperson.
Status Code	The status of the quote, filtered to 'REJECTED'.
Currency	The currency of the quote.
Amount	The total amount of the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Engineering

Path: Workflow > Engineering
Workflow No: 360Q723339

Purpose

The purpose of the Engineering workflow is to provide a centralized view for tracking and managing engineering tasks related to both presales activities (such as design and estimation for opportunities) and active projects. It helps monitor requested, assigned, and overdue engineering work, facilitating better resource management and timely completion of engineering deliverables.

Benefits

- **Improved Tracking:** Enhances the ability to monitor engineering tasks throughout their lifecycle.
- **Presales Visibility:** Offers clear insight into the workload and status of presales design and engineering requests.
- **Project Design Management:** Facilitates better organization and oversight of design and engineering tasks for active projects.
- **Early Issue Detection:** Helps in quickly identifying overdue engineering tasks, allowing for prompt intervention.
- **Streamlined Handoffs:** Supports a smoother transition of information and responsibilities from sales to presales and project engineering teams.
- **Resource Optimization:** Aids in more effective allocation and utilization of engineering resources.
- **Reduced Delays:** Helps minimize project delays by addressing engineering bottlenecks proactively.
- **Task Prioritization:** Enables better prioritization of engineering work based on urgency and project needs.
- **Enhanced Accountability:** Clarifies responsibilities for different engineering tasks.
- **Process Efficiency:** Contributes to a more efficient overall engineering design and execution process.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific salesperson or all.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Requested Presales Design/Eng

The purpose of the Count of Requested Presales Design/Eng bucket is to display the number of presales design and engineering tasks linked to sales opportunities that have been requested but are not yet assigned to an engineer. This helps in monitoring new unassigned presales workload.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific salesperson or all.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for opportunities/tasks where the funnel item assignee is blank, indicating they are unassigned (via hidden filter 'UnAssigned').
Constant Filter	Passes a wildcard '%' to the department parameter of the report, effectively including all departments (via hidden filter 'Percent').
Constant Filter	Filters for items with a time bill category of 'DESIGN' (via hidden filter 'Design').
Constant Filter	Passes a wildcard '%' to the time bill subcategory parameter of the report, including all subcategories (via hidden filter 'Percent').
Constant Filter	Filters for items with a state of 'ACTIVE' (via hidden filter 'Active').
Constant Filter	Passes 'ALL' to the status parameter of the report, typically meaning no specific status filtering is applied by this parameter (via hidden filter 'ALL').
Constant Filter	Sets the 'highlight completed' flag to 'N' for the underlying report (via hidden filter 'NValue').
Constant Filter	Sets the inverse search flag to 'N' for the report (via hidden filter 'NValue').
Constant Filter	Sets the search type to 'L' (LIKE search) for the report (via hidden filter 'LValue').
Inclusion	Includes opportunities where the funnel item's time bill category is 'DESIGN' and is not empty.
Inclusion	Includes opportunities based on the active status of their funnel items and overall opportunity status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0128).
- **Parameters Passed: None.**

Bucket Data Source (Report No: Q0128)

The data for this bucket is sourced from Report No: **WF_Queue_PreSaleEngRequest_List** (Q0128). This report retrieves a list of sales opportunities joined with their associated funnel items, primarily to identify and display presales engineering requests. It filters these requests based on criteria such as assignment status (unassigned for this bucket), time bill category (typically 'DESIGN'), and various opportunity attributes like company, branch, and salesperson.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Opportunity form for the specific record.
Opportunity Number	The unique identifier for the sales opportunity.
Opportunity Title	The title of the sales opportunity.
Entered Date	The date the opportunity was entered.
Customer Name	The name of the customer associated with the opportunity.
Funnel Item Title	The title of the specific funnel item. Uses the opportunity's funnel item title if available, otherwise defaults to the funnel definition title.
Interest	The Interest indicated for the opportunity.
Opportunity Value	The monetary value of the opportunity.
Probability %	The probability percentage of winning the opportunity.
Funnel Position	The numerical position of the opportunity in the sales funnel.
Close Date	The anticipated close date of the opportunity.
Install Date	The anticipated installation date (substantial completion date) for the opportunity.
Request Date	The scheduled start date of the funnel item.
Need By Date	The scheduled end date of the funnel item.
Opportunity Status	The status of the sales opportunity (e.g., ACTIVE, WON, LOST).
Request Status	The status code of the funnel item (e.g., OPEN, COMPLETED).
Primary Sales Rep	The primary salesperson assigned to the opportunity.
Secondary Sales Rep	The secondary salesperson, if any, assigned to the opportunity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Assignee	The user assigned to the funnel item. For this "Requested" bucket, this will typically be blank.
Branch	The branch associated with the opportunity.
Department	The department associated with the opportunity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Assigned Presales Design/Eng

The purpose of the Count of Assigned Presales Design/Eng bucket is to display the number of presales design and engineering tasks linked to sales opportunities that have been assigned to an engineer or designer. This helps in tracking the active presales engineering workload and assignments.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific salesperson or all.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for opportunities/tasks where the funnel item assignee is not blank, indicating they are assigned (via hidden filter 'Assigned').
Constant Filter	Passes a wildcard '%' to the department parameter of the report, effectively including all departments (via hidden filter 'Percent').
Constant Filter	Filters for items with a time bill category of 'DESIGN' (via hidden filter 'Design').
Constant Filter	Passes a wildcard '%' to the time bill subcategory parameter of the report, including all subcategories (via hidden filter 'Percent').
Constant Filter	Filters for items with a state of 'ACTIVE' (via hidden filter 'Active').
Constant Filter	Passes 'ALL' to the status parameter of the report, typically meaning no specific status filtering is applied by this parameter (via hidden filter 'ALL').
Constant Filter	Sets the 'highlight completed' flag to 'N' for the underlying report (via hidden filter 'NValue').
Constant Filter	Sets the inverse search flag to 'N' for the report (via hidden filter 'NValue').
Constant Filter	Sets the search type to 'L' (LIKE search) for the report (via hidden filter 'LValue').
Inclusion	Includes opportunities where the funnel item's time bill category is 'DESIGN' and is not empty.
Inclusion	Includes opportunities based on the active status of their funnel items and overall opportunity status, specifically where a funnel item is assigned.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0128).
- **Parameters Passed: None.**

Bucket Data Source (Report No: Q0128)

The data for this bucket is sourced from Report No: **WF_Queue_PreSaleEngRequest_List** (Q0128). This report retrieves a list of sales opportunities joined with their associated funnel items, primarily to identify and display presales engineering requests. For this "Assigned" bucket, it specifically filters for requests that have an assignee, a time bill category of 'DESIGN', and meet other criteria like company, branch, and salesperson.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Opportunity form for the specific record.
Opportunity Number	The unique identifier for the sales opportunity.
Opportunity Title	The title of the sales opportunity.
Entered Date	The date the opportunity was entered.
Customer Name	The name of the customer associated with the opportunity.
Funnel Item Title	The title of the specific funnel item. Uses the opportunity's funnel item title if available, otherwise defaults to the funnel definition title.
Interest	The Interest indicated for the opportunity.
Opportunity Value	The monetary value of the opportunity.
Probability %	The probability percentage of winning the opportunity.
Funnel Position	The numerical position of the opportunity in the sales funnel.
Close Date	The anticipated close date of the opportunity.
Install Date	The anticipated installation date (substantial completion date) for the opportunity.
Request Date	The scheduled start date of the funnel item.
Need By Date	The scheduled end date of the funnel item.
Opportunity Status	The status of the sales opportunity (e.g., ACTIVE, WON, LOST).
Request Status	The status code of the funnel item (e.g., OPEN, COMPLETED).
Primary Sales Rep	The primary salesperson assigned to the opportunity.
Secondary Sales Rep	The secondary salesperson, if any, assigned to the opportunity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Assignee	The user assigned to the funnel item. For this "Assigned" bucket, this field will be populated.
Branch	The branch associated with the opportunity.
Department	The department associated with the opportunity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Presales Design/Eng

The purpose of the Count of Overdue Presales Design/Eng bucket is to highlight presales design and engineering tasks associated with sales opportunities that have passed their scheduled end date (Need By Date) and are still in an 'OPEN' status. This enables managers to identify and address potential delays in the presales process.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL
Sales Rep	User-selectable. Filters workflow data by a specific salesperson or all.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Passes a wildcard '%' to the department parameter of the report, effectively including all departments (via hidden filter 'Percent').
Constant Filter	Filters for items with a time bill category of 'DESIGN' (via hidden filter 'Design').
Constant Filter	Passes a wildcard '%' to the time bill subcategory parameter of the report, including all subcategories (via hidden filter 'Percent').
Constant Filter	Filters for items with a status of 'OPEN' (via hidden filter 'Open').
Constant Filter	Passes a blank value to the 'where' parameter of the report, implying no additional custom SQL 'where' clause from this filter (via hidden filter 'Blank').
Inclusion	Includes opportunities where the overall opportunity status (Won/Lost code) is active or blank.
Inclusion	Includes opportunities where the funnel item status code indicates it is an active funnel item.
Inclusion	Specifically includes funnel items with a status of 'OPEN'.
Inclusion	Specifically includes funnel items with a time bill category of 'DESIGN'.
Exclusion	Only includes funnel items whose 'Need By Date' (or 'Request Date' if 'Need By Date' is null) is before yesterday, identifying them as overdue.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0127).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0127)

The data for this bucket is sourced from Report No: **WF_Queue_PreSaleEngOverdue_List** (Q0127). This report lists sales opportunities with their associated funnel items that are considered overdue. It specifically filters for active opportunities and funnel items, focusing on those with a 'DESIGN' time bill category and an 'OPEN' status, where the funnel item's scheduled end date has passed (is before yesterday).

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Opportunity form for the specific record.
Opportunity Number	The unique identifier for the sales opportunity.
Entered Date	The date the opportunity was entered.
Customer Name	The name of the customer associated with the opportunity.
Funnel Item Title	The title of the specific funnel item. Uses the opportunity's funnel item title if available, otherwise defaults to the funnel definition title.
Interest	The Interest indicated for the opportunity.
Opportunity Value	The monetary value of the opportunity.
Probability %	The probability percentage of winning the opportunity.
Funnel Position	The numerical position of the opportunity in the sales funnel.
Close Date	The anticipated close date of the opportunity.
Install Date	The anticipated installation date (substantial completion date) for the opportunity.
Funnel Item Request Date	The scheduled start date of the funnel item.
Funnel Item Need By Date	The scheduled end date of the funnel item. This date is primarily used to determine if the item is overdue.
Opportunity Status	The status of the sales opportunity.
Request Status	The status code of the funnel item. For this bucket, it's typically 'OPEN'.
Primary Sales Rep	The primary salesperson assigned to the opportunity.
Sales Rep 2	The secondary salesperson, if any, assigned to the opportunity.
Assignee	The user assigned to the funnel item.
Branch	The branch associated with the opportunity.
Department	The department associated with the opportunity.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Requested Project Design/Eng

The purpose of the Count of Requested Project Design/Eng bucket is to show the number of design and engineering tasks related to active projects that have been requested (status 'DEMAND') but are not yet assigned to a resource. This helps in managing the queue of unassigned project engineering work.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes project tasks with status codes specified as 'DEMAND' (via hidden filter 'Demand').
Constant Filter	Excludes no specific task status codes via the ps_excludestatuscode parameter, as it's mapped to a blank value (via hidden filter 'Blank').
Constant Filter	Passes a wildcard '%' to the User ID parameter for the report, effectively including tasks regardless of user for this aspect (via hidden filter 'Percent').
Constant Filter	Passes a wildcard '%' to the Task Type parameter for the report, including all task types for this aspect (via hidden filter 'Percent').
Constant Filter	Includes project tasks where the time bill category contains 'DESIGN' and the task assignee is blank (via hidden filter 'TaskUnassigned').
Inclusion	Includes project tasks from projects that are not templates.
Inclusion	Includes project tasks where the time bill category contains 'DESIGN' and the task is unassigned.
Inclusion	Filters for project tasks with status codes defined as 'DEMAND'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a comprehensive list of project tasks, joining information from project schedules, project headers, and customer data. For this "Requested Project Design/Eng" bucket, it is filtered to show tasks that are unassigned, have a time bill category related to 'DESIGN', and are in a 'DEMAND' status, within the selected company and branch.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Project Task form for the specific record.
Task Number	The unique identifier for the project task.
Project Number	The identifier of the project to which the task belongs.
Entity Number	The identifier for the company/entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title of the project.
Priority	The priority level of the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Task Type	The type of the project task.
Project Manager	The leader assigned to the project.
Responsible Contact	The contact person responsible for the task.
Assignee Contact	The contact person assigned to the task. For this "Requested" bucket, this will typically be blank.
Estimated Duration	The estimated duration for the task.
Estimated Unit	The unit for the estimated duration (e.g., hours, days).
Time Billed	Total time billed to the task, summed from related time bill records.
Status Code	The status code of the task (e.g., DEMAND).
Category	The category of the task.
Sub Category	The sub-category of the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Assigned Project Design/Eng

The purpose of the Count of Assigned Project Design/Eng bucket is to track the number of project-related design and engineering tasks that have been assigned to a resource and are currently in an 'OPEN' status. This provides visibility into the active project engineering workload.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes project tasks with the status code 'OPEN' (via hidden filter 'Open').
Constant Filter	Excludes no specific task status codes via the ps_excludestatuscode parameter, as it's mapped to a blank value (via hidden filter 'Blank').
Constant Filter	Passes a wildcard '%' to the User ID parameter for the report, effectively including tasks regardless of user for this aspect (via hidden filter 'Percent').
Constant Filter	Passes a wildcard '%' to the Task Type parameter for the report, including all task types for this aspect (via hidden filter 'Percent').
Constant Filter	Includes project tasks where the time bill category contains 'DESIGN' and the task assignee is not blank (via hidden filter 'TaskAssigned').
Inclusion	Includes project tasks from projects that are not templates.
Inclusion	Includes project tasks where the time bill category contains 'DESIGN' and the task has an assignee.
Inclusion	Filters for project tasks with an 'OPEN' status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks from active projects. For this "Assigned Project Design/Eng" bucket, it's filtered to display tasks that are assigned, have a time bill category related to 'DESIGN', are in an 'OPEN' status, and match the selected company and branch.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Project Task form for the specific record.
Task Number	The unique identifier for the project task.
Project Number	The identifier of the project to which the task belongs.
Entity Number	The identifier for the company/entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title of the project.
Priority	The priority level of the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Task Type	The type of the project task.
Project Manager	The leader assigned to the project.
Responsible Contact	The contact person responsible for the task.
Assignee Contact	The contact person assigned to the task. For this "Assigned" bucket, this field will be populated.
Estimated Duration	The estimated duration for the task.
Estimated Unit	The unit for the estimated duration (e.g., hours, days).
Time Billed	Total time billed to the task, summed from related time bill records.
Status Code	The status code of the task (e.g., OPEN).
Category	The category of the task.
Sub Category	The sub-category of the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Project Design/Eng

The purpose of the Count of Overdue Project Design/Eng bucket is to identify and display the number of project-related design and engineering tasks that have passed their scheduled end date and are still in an 'OPEN' status. This allows for proactive management of potential delays in project engineering.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Controls the company (entity) context for the workflow data.	List		Current User's Company
Branch	User-selectable. Filters workflow data by a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Passes a wildcard '%' to the Task Type parameter for the report, including all task types for this aspect (via hidden filter 'Percent').
Constant Filter	Includes project tasks where the time bill category contains 'DESIGN' and the task's EndDate is before yesterday (i.e., overdue) (via hidden filter 'TaskOverdue').
Inclusion	Includes project tasks from projects that are not templates.
Inclusion	Includes project tasks where the time bill category contains 'DESIGN'.
Inclusion	Filters for project tasks with an 'OPEN' status.
Exclusion	Only includes project tasks whose End Date is before yesterday, marking them as overdue.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks. For this "Overdue Project Design/Eng" bucket, it is filtered to show 'OPEN' tasks with a 'DESIGN' time bill category where the task's end date is in the past, within the selected company and branch.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Project Task form for the specific record.
Task Number	The unique identifier for the project task.
Project Number	The identifier of the project to which the task belongs.
Entity Number	The identifier for the company/entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title of the project.
Priority	The priority level of the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task. This date is key for determining if it's overdue.
Task Type	The type of the project task.
Project Manager	The leader assigned to the project.
Responsible Contact	The contact person responsible for the task.
Assignee Contact	The contact person assigned to the task.
Estimated Duration	The estimated duration for the task.
Estimated Unit	The unit for the estimated duration (e.g., hours, days).
Time Billed	Total time billed to the task, summed from related time bill records.
Status Code	The status code of the task (e.g., OPEN).
Category	The category of the task.
Sub Category	The sub-category of the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Projects Overview

Path: Workflow > Projects Overview
Workflow No: 360Q723343

Purpose

The Projects Overview workflow provides a comprehensive dashboard for monitoring and managing various aspects of ongoing projects. It offers quick insights into project statuses, potential issues, and key metrics, enabling effective project tracking and decision-making for project managers and stakeholders. This workflow helps in identifying projects that require attention, tracking budget and schedule adherence, and managing project-related tasks and procurement.

Benefits

- **Centralized Monitoring**: Offers a single view of key project metrics and statuses across different stages.
- **Proactive Issue Identification**: Highlights projects that are overdue, over budget, or lack an assigned Project Manager, enabling timely intervention.
- **Improved Financial Tracking**: Provides visibility into invoicing tasks, change orders (CCOs/ICOs), and budget adherence.
- **Enhanced Procurement Visibility**: Tracks Purchase Orders (POs) with missing ETAs or ETAs past their requested dates.
- **Efficient Task Management**: Displays overdue tasks and tasks due in upcoming weeks, aiding in resource planning and prioritization.
- **Streamlined Change Management**: Segregates and tracks Customer Change Order (CCO) and Internal Change Order (ICO) quotes and orders.
- **Better Resource Utilization**: Links to Resource Console and Projects Console for deeper insights into resource allocation and project details.
- **Timely Event Review**: Alerts users to unreviewed project events, ensuring important communications or issues are addressed.
- **Improved Equipment Readiness**: Shows projects where equipment has become available, facilitating scheduling and logistics.
- **Data-Driven Decisions**: Empowers users with actionable data to make informed decisions and improve project outcomes.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Projects with No PM

The purpose of the Count of Projects with No PM bucket is to highlight projects that do not have an assigned Project Manager (Project Manager). This helps ensure all projects have appropriate leadership and accountability.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
No PM	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include only projects where the Project Manager field is empty.	Text		
Post	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of 'POST'. This may indicate projects past a certain stage or with posted transactions.	Text		POST
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Restricted to projects where no Project Manager (Project Manager) has been assigned.
Constant Filter	The 'excludestatuscode' parameter is set to 'POST', meaning projects with a 'POST' status attribute are excluded. This might aim to filter out very early stage or template-like projects if 'POST' signifies a later stage not relevant for PM assignment issues.
Constant Filter	Includes projects of all status codes initially, further refined by other status filters.
Constant Filter	Includes projects initially for all Project Managers (this is superseded by the 'No PM' filter).
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. For this bucket, it is configured to show projects that currently do not have an assigned Project Manager (Project Manager). The report typically displays project identifiers, customer information, key dates, and status, excluding project templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Dataentry Projects

The purpose of the Count of Dataentry Projects bucket is to display the number of projects that are currently in the 'DATAENTRY' (or 'PRE') status. These projects are in their initial setup phase, possibly awaiting more details or assignment before becoming fully active.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Pre	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of 'PRE' (typically 'DATAENTRY' status).	Text		PRE
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating ‘PRE’ (typically ‘DATAENTRY’).
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Includes projects of all status codes initially, further refined by other status filters.
Constant Filter	Includes projects regardless of the assigned Project Manager.
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The 'type’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. It is designed to provide an overview of projects, including their status, key dates, associated personnel, and identifiers. The report can be filtered by various project attributes such as company, branch, department, customer, project type, status codes (both for inclusion and exclusion), Project Manager, and salesperson, allowing for targeted views of project data. Projects that are designated as templates are excluded from this list.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Active Projects

The purpose of the Count of Active Projects bucket is to display the number of projects that are currently in an 'ACTIVE' status, excluding those that are substantially completed or in accounting closeout. This provides a quick view of ongoing projects.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Active	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of 'ACTIVE'.	Text		ACTIVE
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
No Subst-Cmplt or Accounting	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude projects with status codes of 'ACCOUNTING' or 'SUBSTCOMPL'.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating ‘ACTIVE’.
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Includes projects of all status codes initially, further refined by other status filters.
Constant Filter	Includes projects regardless of the assigned Project Manager.
Constant Filter	Excludes projects that are in ‘ACCOUNTING’ or ‘SUBSTCOMPL’ (Substantially Completed) status.
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
  - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
  - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'type’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. For this bucket, it is configured to show active projects, meaning projects that are ongoing and have not yet reached substantial completion or accounting closeout phases. The report typically displays project identifiers, customer information, key dates, Project Manager, and status, excluding project templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Substantially Completed Projects

The purpose of the Count of Substantially Completed Projects bucket is to display the number of projects that have reached the 'SUBSTCOMPL' (Substantially Completed) status. This indicates projects where the main work is finished and they are ready for handover or final accounting processes.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Substcompl	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code of 'SUBSTCOMPL'.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating 'ACTIVE'. (Note: This is likely superseded by the specific status filter for 'SUBSTCOMPL' for this bucket.)
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Restricted to projects with a status code of 'SUBSTCOMPL' (Substantially Completed).
Constant Filter	Includes projects regardless of the assigned Project Manager.
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. For this bucket, it is specifically configured to show projects that are in the 'SUBSTCOMPL' (Substantially Completed) status. The report typically displays project identifiers, customer information, key dates, Project Manager, and status, excluding project templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Projects in Accounting Closeout

The purpose of the Count of Projects in Accounting Closeout bucket is to display the number of projects that are currently in the 'ACCOUNTING' status. This indicates projects that have been substantially completed and are now undergoing final financial reconciliation and closing procedures by the accounting department.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Accounting	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code of 'ACCOUNTING'.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating 'ACTIVE'. (Note: This is likely superseded by the specific status filter for 'ACCOUNTING' for this bucket.)
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Restricted to projects with a status code of 'ACCOUNTING'.
Constant Filter	Includes projects regardless of the assigned Project Manager.
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. For this bucket, it is configured to show projects that are in the 'ACCOUNTING' status, indicating they are in the final financial closing stage. The report typically displays project identifiers, customer information, key dates, Project Manager, and status, excluding project templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of CCO Quotes

The purpose of the Count of CCO Quotes bucket is to display the number of Customer Change Order (CCO) quotes that are currently active and not yet converted or closed. This helps track pending CCOs that require customer approval or further action.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
CCO	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records of type 'CCO' (Customer Change Order).	Text		CCO
Closed Quote	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude quotes with status codes of 'CONVERTED' or 'CLOSED'.	Text		CONVERTED, CLOSED
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Caption	Description	Type	Options	Default
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text		N

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes quotes for all customers (not filtered by a specific customer).
Constant Filter	Includes quotes for all sales types initially.
Constant Filter	Restricted to quotes of type 'CCO' (Customer Change Order).
Constant Filter	Includes quotes regardless of the assigned Salesperson.
Constant Filter	Includes quotes for projects regardless of the assigned Project Manager.
Constant Filter	Excludes quotes that have been 'CONVERTED' to an order or 'CLOSED'.
Constant Filter	Set to not include items from closed projects, ensuring focus on active CCO quotes for ongoing projects.
Exclusion	Excludes project quotes from projects that are designated as templates (implicitly, as quotes are on projects).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0132).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0132)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Quote_List** (Q0132). This report lists project-related quotes. For this bucket, it is configured to show Customer Change Order (CCO) quotes that are active (not yet 'CONVERTED' or 'CLOSED') and are associated with non-closed projects. The report displays information such as quote number, customer, project details, quote title, date, status, and amount.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Quote form for this quote record.
Contract No	The unique identifier for the quote.
Company	Name of the customer associated with the quote. Sourced from Customer information.
Project No	The identifier of the project to which this CCO quote is linked.
Project Title	The title of the project associated with the CCO quote.
Quote Title	The title of the CCO quote.
Date	The date the CCO quote was created.
Contact	The primary contact person associated with the CCO quote.
Saletype	The sale type classification of the CCO quote.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson associated with the CCO quote.
Status Code	The status of the CCO quote (e.g., DATAENTRY, AUTHORIZED, APPROVEQ).
Currency	The currency in which the CCO quote amount is specified.
Amount	The total amount of the CCO quote.
Branch	The branch associated with the CCO quote.
Department	The department associated with the CCO quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of CCO Orders Pending Approval

The purpose of the Count of CCO Orders Pending Approval bucket is to display the number of Customer Change Orders (CCOs) that have been converted from quotes and are now in 'CONFIRMED' status, awaiting final approval before impacting the project.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
CCO	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records of type 'CCO' (Customer Change Order).	Text		CCO
CONFIRMED	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include records with a status code of 'CONFIRMED'.	Text		
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Caption	Description	Type	Options	Default
	regardless of the Project Manager assigned, defaulting to show ‘ALL’.			
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included (‘N’).	Text		N

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to orders of type ‘CCO’ (Customer Change Order).
Constant Filter	Restricted to orders with a status code of ‘CONFIRMED’.
Constant Filter	Includes orders for all customers (not filtered by a specific customer).
Constant Filter	Includes orders for all sales types initially.
Constant Filter	Includes orders regardless of the assigned Salesperson.
Constant Filter	Includes orders for projects regardless of the assigned Project Manager.
Constant Filter	Set to not include items from closed projects, ensuring focus on active CCO orders for ongoing projects.
Exclusion	Excludes project orders from projects that are designated as templates (implicitly, as orders are on projects).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0132).
- **Parameters Passed:**
  - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
  - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'UNIFIEDTYP’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Bucket Data Source (Report No: Q0132)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Quote_List** (Q0132), which is also used for CCO Quotes. For this bucket, it is filtered to show Customer Change Orders (type ‘CCO’) that are in ‘CONFIRMED’ status, associated with non-closed projects. The report lists these orders, providing details like order number (which is the original quote number), customer, project information, title, date, status, and amount, effectively tracking CCOs that have been accepted by the customer and are pending internal approval.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the detailed Order form for this CCO order record.
Contract No	The unique identifier for the CCO order.
Company	Name of the customer associated with the CCO order. Sourced from Customer information.
Project No	The identifier of the project to which this CCO order is linked.
Project Title	The title of the project associated with the CCO order.
Quote Title	The title of the CCO order (originating from the quote).
Date	The date the CCO order was created/confirmed.
Contact	The primary contact person associated with the CCO order.
Saletype	The sale type classification of the CCO order.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson associated with the CCO order.
Status Code	The status of the CCO order (typically ‘CONFIRMED’ for this bucket).
Currency	The currency in which the CCO order amount is specified.
Amount	The total amount of the CCO order.
Branch	The branch associated with the CCO order.
Department	The department associated with the CCO order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of ICO Orders Pending Approval

The purpose of the Count of ICO Orders Pending Approval bucket is to display the number of Internal Change Orders (ICOs) that are in 'CONFIRMED' status and are awaiting final approval. ICOs typically adjust project costs without affecting the customer price.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
ICO	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records of type 'ICO' (Internal Change Order).	Text		ICO
CONFIRMED	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include records with a status code of 'CONFIRMED'.	Text		
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		ALL
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text		N

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to orders of type ‘ICO’ (Internal Change Order).
Constant Filter	Restricted to orders with a status code of ‘CONFIRMED’.
Constant Filter	Includes orders for all customers (not filtered by a specific customer).
Constant Filter	Includes orders for all sales types initially.
Constant Filter	Includes orders regardless of the assigned Salesperson.
Constant Filter	Includes orders for projects regardless of the assigned Project Manager.
Constant Filter	Set to not include items from closed projects, ensuring focus on active ICO orders for ongoing projects.
Exclusion	Excludes project orders from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0130).
- **Parameters Passed:**
  - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
  - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'UNIFIEDTYP’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Bucket Data Source (Report No: Q0130)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Order_List** (Q0130). This report lists project-related orders. For this bucket, it is configured to show Internal Change Orders (type ‘ICO’) that are in ‘CONFIRMED’ status and associated with non-closed projects. The report provides details such as order number, customer, project information, order title, date, status, and amount.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the detailed Order form for this ICO record.
Contract No	The unique identifier for the ICO.
Company No.	Identifier for the financial entity associated with the project of this ICO.
Company	Name of the customer associated with the project of this ICO.
Project No	The identifier of the project to which this ICO is linked.
Project Title	The title of the project associated with the ICO.
Quote Title	The title of the ICO (may originate from an internal quote or be entered directly on the order).
Date	The date the ICO was created/confirmed.
Contact	The primary contact person associated with the ICO (often internal).
Saletype	The sale type classification of the ICO.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson associated with the project or ICO.
Status Code	The status of the ICO (typically ‘CONFIRMED’ for this bucket).
Currency Type	The currency in which the ICO amounts are specified.
Amount	The total cost impact amount of the ICO.
Branch	The branch associated with the ICO.
Department	The department associated with the ICO.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Upcoming Invoicing Tasks this Month

The purpose of the Count of Upcoming Invoicing Tasks this Month bucket is to display the number of project-related invoicing tasks that are scheduled to occur from the current date up to the end of the current month and are not yet completed or cancelled. This helps in forecasting and preparing for upcoming billing activities.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text		COMPLETED, CANCELED, CANCELLED
Future Invoice	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include invoicing tasks (record type='INVOICE') scheduled between the current system date and the end of the current month.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text		N

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Restricted to tasks of 'INVOICE' type where the scheduled date is between the current system date and the end of the current month.
Constant Filter	Includes tasks for projects regardless of the assigned Project Manager.
Constant Filter	Includes tasks regardless of the assigned user (Assignee).
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks based on various criteria. For this bucket, it's configured to identify invoicing tasks (record type = 'INVOICE') that are scheduled within the current month (from today until month-end) and are not yet completed or cancelled. It excludes tasks from closed projects and project templates. The report provides details such as task number, project information, task title, dates, assignee, and status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Invoicing Tasks

The purpose of the Count of Overdue Invoicing Tasks bucket is to display the number of project-related invoicing tasks whose scheduled date is in the past and are not yet marked as completed or cancelled. This helps accounts receivable or project managers identify invoicing milestones that have been missed.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of ‘COMPLETED’, ‘CANCELED’, or ‘CANCELLED’.	Text		COMPLETED, CANCELED, CANCELLED
Past Invoice	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include invoicing tasks (record type=‘INVOICE’) whose scheduled date is before the current system date.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show ‘ALL’.	User		ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included (‘N’).	Text		N

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Restricted to tasks of 'INVOICE' type where the scheduled date is in the past.
Constant Filter	Includes tasks for projects regardless of the assigned Project Manager.
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.
Inclusion	Includes tasks regardless of the assigned user (Assignee) or responsible contact if other conditions are met.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks based on various criteria. For this bucket, it's configured to identify invoicing tasks (tasks with record type = 'INVOICE') that are past their scheduled date and are not yet completed or cancelled. It excludes tasks from closed projects and project templates. The report provides details such as task number, project information, task title, dates, assignee, and status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Projects

The purpose of the Count of Overdue Projects bucket is to display the number of active projects whose ‘End Date’ is in the past. This helps identify projects that are running behind schedule and may require immediate attention.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Active	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of ‘ACTIVE’.	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to ‘ALL’, effectively not applying a filter for those specific fields unless overridden.	Text		
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Overdue	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects where the project’s End Date is earlier than the current system date.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show ‘ALL’.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating 'ACTIVE'.
Constant Filter	Includes projects regardless of the assigned Salesperson.
Constant Filter	Includes projects for all customers (not filtered by a specific customer).
Constant Filter	Restricted to projects where the project's End Date is before the current system date.
Constant Filter	Includes projects regardless of the assigned Project Manager.
Exclusion	Excludes records that are defined as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filtering criteria. For this bucket, it is configured to display active projects whose scheduled 'End Date' has passed, indicating they are overdue. The report typically shows project identifiers, customer information, key dates (including the past end date), Project Manager, and status, excluding project templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project (e.g., DATAENTRY, ACTIVE, COMPLETED).
Percent Complete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Over Budget Projects

The purpose of the Count of Over Budget Projects bucket is to display the number of active projects where the actual total costs incurred to date have exceeded the projected total costs. This helps in identifying projects with potential cost overruns.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Active	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of 'ACTIVE'.	Text		ACTIVE
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating 'ACTIVE'.
Inclusion	Includes only projects where the sum of actual costs from job cost journal entries exceeds the sum of projected costs from associated order items.
Exclusion	Excludes records that are defined as project templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0131).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0131)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Over_Budget_List** (Q0131). This report identifies and lists projects where the actual total costs have exceeded the total projected costs. It considers actual costs from various sources including journal entries related to project expenses and compares them against the sum of projected costs derived from the project's order items. The report is typically filtered to show only active projects and excludes project templates.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
Project No	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
Status Code	The status of the project.
PCT Complete	The reported percentage of project completion.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Over Budget Tasks

The purpose of the Count of Over Budget Tasks bucket is to display the number of project tasks where the actual effort (Time Billed) has exceeded the estimated effort. This helps in identifying tasks that have consumed more resources than planned.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text		COMPLETED, CANCELED, CANCELLED
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters to 'ALL', effectively not applying a filter for those specific fields unless overridden.	Text		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Includes tasks for all users initially (not specifically filtered by user for this bucket).
Inclusion	Restricted to tasks where the sum of actual time billed exceeds the estimated task effort.
Exclusion	Excludes project tasks from projects that are designated as templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0141).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0141)

The data for this bucket is sourced from Report No: **WF_Queue_Task_Over_Budget_List** (Q0141). This report identifies project tasks where the total actual labor effort recorded has surpassed the planned or budgeted effort. The report calculates the sum of all time billed directly to a task and any time billed to its sub-tasks. This total actual effort is then compared against the task's original estimated effort. If the actual effort is greater than the estimated effort, the task is included in the report. The report considers tasks across various projects, filtered by company, branch, department, and project type, and excludes tasks from project templates or those associated with closed projects. Only tasks with recorded time entries are evaluated.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No.	The unique identifier for the project task.
Task Type	Indicates if the task is a 'Parent' task or a 'Sub' task within the project's work breakdown structure.
Entity No.	The identifier of the financial entity (company) associated with the project.
Customer Name	The name of the customer for whom the project is being executed.
Project Title	The title of the project to which this over-budget task belongs.
Task Priority	The priority level assigned to the task (e.g., High, Medium, Low).
Task Title	The descriptive title of the project task.
Task Start Date	The scheduled start date of the task.
Task End Date	The scheduled end date of the task.
Task Control Type	The functional type of the task, such as 'TASK' or 'MILESTONE', indicating its role in project execution or billing.
Project Manager	The user ID of the Project Manager or manager responsible for the overall project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Responsible Person	The name of the contact designated as responsible for the task's completion.
Assignee	The full name of the user to whom the task is currently assigned.
Estimated Duration	The originally estimated duration required to complete the task.
Estimated Duration Unit	The unit of measurement for the estimated duration (e.g., Hours, Days).
Total Time Billed	The total actual time recorded (billed) against this task, including time logged on any of its sub-tasks.
Task Status	The current operational status of the task (e.g., OPEN, INPROGRESS, PENDING).
Time Bill Category	The primary category assigned to the time billed for this task, used for labor costing and reporting.
Time Bill Sub Category	The secondary category (sub-category) assigned to the time billed for this task, providing further detail for labor costing and reporting.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Tasks

The purpose of the Count of Overdue Tasks bucket is to display the number of project tasks (excluding invoicing tasks) whose 'End Date' is in the past, they have an assigned resource, and are not yet completed or cancelled. This helps project managers identify and address tasks that are falling behind schedule.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text		COMPLETED, CANCELED, CANCELLED
B	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for tasks of a specific type.	Text		
Overdue & Assigned	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include tasks whose End Date is before the current system date AND have an assigned user (Assignee or Responsible).	Text		
All	Hidden (non-user selectable). Constant filter. Its fixed purpose is to set various report parameters	Text		

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Caption	Description	Type	Options	Default
	to ‘ALL’, effectively not applying a filter for those specific fields unless overridden.			
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included (‘N’).	Text		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are ‘COMPLETED’, ‘CANCELED’, or ‘CANCELLED’.
Constant Filter	Restricted to tasks of a specific type ‘B’ (which typically excludes invoicing tasks).
Constant Filter	Restricted to tasks whose End Date is before the current system date AND have either a responsible contact or an assignee.
Constant Filter	Includes tasks for all users initially (this is refined by the ‘Overdue & Assigned’ filter and user-selectable ‘Project Manager’ filter).
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
  - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
  - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
  - The 'UNIFIEDTYP’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks based on various criteria. For this bucket, it's configured to identify non-invoicing tasks (typically of type 'B') that are past their 'End Date', have an assigned resource (responsible contact or assignee), and are not yet marked as completed or cancelled. It excludes tasks from closed projects and project templates. The report provides details such as task number, project information, task title, dates, assignee, and status.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due This Week

The purpose of the Count of Due This Week bucket is to display the number of project tasks (excluding invoicing tasks and tasks from closed projects) that are scheduled to end within the current week (from Monday to the upcoming Sunday). This helps users prioritize and manage tasks with near-term deadlines.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text		COMPLETED, CANCELED, CANCELLED
Due This Week	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include tasks whose End Date falls within the current week (Monday to Sunday).	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text		N

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Restricted to tasks whose scheduled End Date falls within the current calendar week (typically Monday to Sunday of the current system date).
Constant Filter	Includes tasks for projects regardless of the assigned Project Manager.
Constant Filter	Includes tasks regardless of the assigned user (Assignee).
Constant Filter	Restricted to task types that are not 'INVOICE' tasks (implicitly by not mapping task type to 'INVOICE').
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks. For this specific bucket, it is configured to display tasks (excluding invoicing tasks and tasks from closed projects) that have an 'End Date' scheduled for the current week. This helps users focus on immediate deadlines. The report includes details such as task number, project information, task title, specific dates, assignee, and status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due Next Week

The purpose of the Count of Due Next Week bucket is to display the number of project tasks (excluding invoicing tasks and tasks from closed projects) that are scheduled to end during the upcoming week. This provides a forward-looking view for task planning and resource allocation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List	Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List	ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List	ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP	ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text	
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text	COMPLETED, CANCELED, CANCELLED
Due Next Week	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include tasks whose End Date falls within the next calendar week.	Text	
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User	ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text	

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Restricted to tasks whose scheduled End Date falls within the next calendar week.
Constant Filter	Includes tasks for projects regardless of the assigned Project Manager.
Constant Filter	Includes tasks regardless of the assigned user (Assignee).
Constant Filter	Restricted to task types that are not 'INVOICE' tasks (implicitly by not mapping task type to 'INVOICE').
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks. For this bucket, it's configured to show tasks (excluding invoicing tasks and tasks from closed projects) that have an 'End Date' scheduled for the next calendar week. This provides a short-term forecast of upcoming task deadlines. The report includes details such as task number, project information, task title, dates, assignee, and status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due Week After

The purpose of the Count of Due Week After bucket is to display the number of project tasks (excluding invoicing tasks and tasks from closed projects) that are scheduled to end in the week following the next week. This gives a two-week-out perspective on task deadlines.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List	Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List	ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List	ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP	ALL
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text	
Closed Projects	Hidden (non-user selectable). Constant filter. Its fixed purpose is to exclude tasks related to projects with status codes of 'COMPLETED', 'CANCELED', or 'CANCELLED'.	Text	COMPLETED, CANCELED, CANCELLED
Due Week After	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include tasks whose End Date falls within the calendar week that is two weeks from the current week.	Text	
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User	ALL
N	Hidden (non-user selectable). Constant filter. Its fixed purpose is to filter for records where project closed items are not included ('N').	Text	N

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks associated with projects that are 'COMPLETED', 'CANCELED', or 'CANCELLED'.
Constant Filter	Restricted to tasks whose scheduled End Date falls within the calendar week that is two weeks after the current week.
Constant Filter	Includes tasks for projects regardless of the assigned Project Manager.
Constant Filter	Includes tasks regardless of the assigned user (Assignee).
Constant Filter	Restricted to task types that are not 'INVOICE' tasks (implicitly by not mapping task type to 'INVOICE').
Constant Filter	Set to not include project closed items, ensuring focus on active or open tasks.
Exclusion	Excludes project tasks from projects that are designated as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report lists project tasks. For this bucket, it's configured to show tasks (excluding invoicing tasks and tasks from closed projects) that have an 'End Date' scheduled for the week after next. This provides a medium-term forecast of upcoming task deadlines. The report includes details such as task number, project information, task title, dates, assignee, and status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project Task form for this task record.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which this task belongs.
Company No	Identifier for the financial entity associated with the project of this task.
Company	Name of the customer for the project associated with this task.
Project Title	The title of the project to which this task belongs.
Priority	The priority level assigned to the task.
Task Title	The title of the project task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type or classification of the task.
Project Manager	The User ID of the Project Manager for the project associated with this task.
Responsible	The contact person responsible for the task.
Assignee	The contact person or user assigned to perform the task.
Est	The estimated effort (e.g., hours) for the task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this task.
Status Code	The status of the task (e.g., OPEN, COMPLETED).
Category	The primary category assigned to the task for classification or time billing purposes.
Sub Cat	The sub-category assigned to the task for further classification.
Branch	The branch associated with the project of this task.
Department	The department associated with the project of this task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs No ETA (Past 48 Hrs)

The purpose of the Count of POs No ETA (Past 48 Hrs) bucket is to display the number of Purchase Order items that were created more than 48 hours ago, are for confirmed or approved POs, are still in 'DATAENTRY' (not received) status, and do not have an Estimated Time of Arrival (ETA) date entered. This helps purchasing staff identify and follow up on POs lacking crucial delivery information.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
No ETA	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include Purchase Order items that have no ETA, are on 'CONFIRMED' or 'APPROVED' POs, and the PO was created more than 48 hours ago.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to Purchase Order items that have no ETA, are part of ‘CONFIRMED’ or ‘APPROVED’ status POs, and where the PO was created more than 48 hours ago.
Constant Filter	Includes Purchase Order items associated with projects regardless of the assigned Project Manager.
Inclusion	Includes only Purchase Order items that are in ‘DATAENTRY’ status.
Inclusion	Includes only Purchase Order items linked to an order item that is also in ‘DATAENTRY’ status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:**
    - The 'Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The 'branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The 'department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The 'UNIFIEDTYP’ parameter of the target form is set using the current value of the workflow filter ‘Project Type’.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order (PO) items. For this bucket, it’s configured to show PO items that were created over 48 hours ago, belong to POs in ‘CONFIRMED’ or ‘APPROVED’ status, are themselves in ‘DATAENTRY’ (not received) status with no ETA date, and are linked to order items also in ‘DATAENTRY’ status. This helps identify POs needing an ETA update. The report provides details like PO number, item description, vendor, and various dates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the detailed Purchase Order form for this PO item record.
PO Num	The Purchase Order number associated with the item.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer or purchasing agent who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor from whom the item is being purchased.
Master No	The unique identifier for the product or material (master item) being purchased.
Description	The description of the Purchase Order item.
PO Rls Date	The Purchase Order Release Date, indicating when the item was approved or released for purchasing.
Rqst Date	The date the item was requested for the project or call.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number if the PO item is linked to a project.
Call No	The service call number if the PO item is linked to a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	Any notes or comments associated with the Purchase Order. This column also provides a pop-up for detailed notes.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson associated with the original order linked to this PO item.
DS	Indicates if the item is marked for Drop Shipment (‘Y’ if true).
Project Type	The type of the project if the PO item is linked to a project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue POs

The purpose of the Count of Overdue POs bucket is to display the number of Purchase Order items that are past their Estimated Time of Arrival (ETA) date and are still in a ‘DATAENTRY’ (not yet received) status. This helps in tracking and following up on delayed deliveries from vendors.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Past ETA	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include Purchase Order items where the ETA date is before the current system date.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show ‘ALL’.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to Purchase Order items where the ETA date is before the current system date.
Constant Filter	Includes Purchase Order items associated with projects regardless of the assigned Project Manager.
Inclusion	Includes only Purchase Order items that are in ‘DATAENTRY’ status.
Inclusion	Includes only Purchase Order items linked to an order item that is also in ‘DATAENTRY’ status.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order (PO) items, focusing on their Estimated Time of Arrival (ETA) and status. For this bucket, it specifically identifies PO items that are past their ETA and are yet to be received (status 'DATAENTRY'), and whose linked order items are also in 'DATAENTRY' status. The report provides details like PO number, item description, master number, vendor, various dates (PO date, PO release date, request date, ETA), and associated project or call information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the detailed Purchase Order form for this PO item record.
PO Num	The Purchase Order number associated with the item.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer or purchasing agent who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor from whom the item is being purchased.
Master No	The unique identifier for the product or material (master item) being purchased.
Description	The description of the Purchase Order item.
PO Rls Date	The Purchase Order Release Date, indicating when the item was approved or released for purchasing.
Rqst Date	The date the item was requested for the project or call.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number if the PO item is linked to a project.
Call No	The service call number if the PO item is linked to a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	Any notes or comments associated with the Purchase Order. This column also provides a pop-up for detailed notes.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson associated with the original order linked to this PO item.
DS	Indicates if the item is marked for Drop Shipment (‘Y’ if true).
Project Type	The type of the project if the PO item is linked to a project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs ETA Past Requested

The purpose of the Count of POs ETA Past Requested bucket is to display the number of Purchase Order items where the Estimated Time of Arrival (ETA) is later than the date the item was requested (Request Date). This helps identify potential delays in material availability for projects or calls.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
ETA>ReqDate	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include Purchase Order items where the ETA is later than the item's delivery/request date.	Text		
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to Purchase Order items where the ETA date is later than the associated order item's request date.
Constant Filter	Includes Purchase Order items associated with projects regardless of the assigned Project Manager.
Inclusion	Includes only Purchase Order items that are in 'DATAENTRY' status.
Inclusion	Includes only Purchase Order items linked to an order item that is also in 'DATAENTRY' status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'UNIFIEDTYP' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order (PO) items. For this specific bucket, it filters to show PO items that are not yet received ('DATAENTRY' status) and whose Estimated Time of Arrival (ETA) is later than the original request date for the item (ci.DLVDATE). This highlights potential procurement delays affecting project timelines. The report provides details such as PO number, item description, vendor, various dates, and associated project or call information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the detailed Purchase Order form for this PO item record.
PO Num	The Purchase Order number associated with the item.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer or purchasing agent who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor from whom the item is being purchased.
Master No	The unique identifier for the product or material (master item) being purchased.
Description	The description of the Purchase Order item.
PO Rls Date	The Purchase Order Release Date, indicating when the item was approved or released for purchasing.
Rqst Date	The date the item was requested for the project or call.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number if the PO item is linked to a project.
Call No	The service call number if the PO item is linked to a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	Any notes or comments associated with the Purchase Order. This column also provides a pop-up for detailed notes.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson associated with the original order linked to this PO item.
DS	Indicates if the item is marked for Drop Shipment (‘Y’ if true).
Project Type	The type of the project if the PO item is linked to a project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Equipment Available

The purpose of the Count of Equipment Available bucket is to display the number of active projects where all required equipment/materials (specifically items of type ‘Q’ - Quantity-based or ‘A’ - Asset-based) have been picked and are ready for the next phase, such as shipping or installation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all project data displayed in the workflow to a specific financial entity. Users can change this to view projects for other entities.	List		Current User's Company
Branch	User-selectable. Filters all project data displayed in the workflow to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters all project data displayed in the workflow to a specific department or all departments. Helps in viewing projects managed by a specific department.	List		ALL
Project Type	User-selectable. Allows filtering projects based on one or more selected project types. This helps in analyzing specific categories of projects.	General Code: UNIFIEDTYP		ALL
Active	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects with a status code attribute of ‘ACTIVE’.	Text		ACTIVE
Blank	Hidden (non-user selectable). Constant filter. Its fixed purpose is to pass blank values to certain report parameters.	Text		

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code attribute indicating ‘ACTIVE’.
Inclusion	Includes only projects where the count of picked quantity-based (Q-type) or asset-based (A-type) items equals the total count of such items required for the project that are not cancelled, returned, shipped or part of change orders.
Inclusion	The count of picked items must be greater than zero, ensuring that projects with no Q-type or A-type items are not inadvertently included.
Exclusion	Excludes records that are defined as project templates.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0340).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'Type' parameter of the target form is set using the current value of the workflow filter 'Project Type'.

Bucket Data Source (Report No: Q0340)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Equipment_Available** (Q0340). This report lists active projects where all required quantity-based (Q-type) and asset-based (A-type) materials have been picked from inventory. It compares the count of picked items against the total required items (excluding those already shipped, cancelled, or part of certain change orders) to determine if all equipment is available. The report helps identify projects ready for equipment dispatch or installation.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to open the Project form for this project record.
ProjectNo	The project number.
Company No	Identifier for the financial entity associated with the project.
Company	Name of the customer for whom the project is being executed. Sourced from Customer information.
Title	The title of the project.
Type	Project type.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the person designated as the Project Manager or Project Manager.
StatusCode	The status of the project.
PercentComplete	The reported percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Unreviewed Project Events

The purpose of the Count of Unreviewed Project Events bucket is to display the number of project-related events that have not yet been marked as reviewed. This helps ensure that important project communications, issues, or updates are acknowledged and addressed in a timely manner.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Proj Leader	Hidden (non-user selectable). Constant filter. Its fixed purpose is to include projects regardless of the Project Manager assigned, defaulting to show 'ALL'.	User		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes project events for all Project Managers by default.
Inclusion	Restricted to project events where the 'Review Date' is empty (not yet reviewed).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0346).
- **Parameters Passed:** None beyond the implicit constant filters.

Bucket Data Source (Report No: Q0346)

The data for this bucket is sourced from Report No: **WF_ProjectEvents_Unreviewed** (Q0346). This report lists project events that have not yet been marked as reviewed. It retrieves event details such as the event number, associated project number and title, event date, type, comment, and the user who entered it. The primary filter for this report is to show only events where the REVIEWDATE is empty.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Event No.	The unique identifier for the project event, providing a drilldown to the event details form.
Project No.	The identifier of the project associated with the event, providing a drilldown to the project form.
Project Title	The title of the project associated with the event.
Date	The date the project event was created or occurred.
Type	The type or category of the project event (e.g., Note, Issue, Risk).
Comment	The detailed comment or description of the project event.
Entered By	The User ID of the person who created or entered the project event.

Default Sorting

The WF_ProjectEvents_Unreviewed report is ordered by default in the following manner:

#	Column	Method
1	DATE	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Projects Status

The purpose of the Projects Status bucket is to provide a direct link to the "Project Status Quick View" screen in Q360. This screen offers a comprehensive overview and detailed reporting on the status of various projects.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Project Status Quick View
- **Parameters Passed:**
    - The ‘activeonly’ parameter of the target form is set using the current value of the workflow filter ‘Y’.
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘department’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘category’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘projecttype’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘projectsubcat’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘projectstatus’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘userid’ parameter of the target form is set using the current value of the workflow filter ‘All’.
    - The ‘asofdate’ parameter of the target form is set using the current value of the workflow filter ‘Today’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Time Billing Summary

The purpose of the Time Billing Summary bucket is to provide a direct link to the "Time Billing Summary Quick View" in Q360.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Time Billing Summary Quick View
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Projects Console

The purpose of the Projects Console bucket is to provide a direct link to the "Projects Console" (or Project Master Console) in Q360. This console likely offers an alternative or specialized view for managing and overseeing multiple projects.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Projects Console
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Resource Console

The purpose of the Resource Console bucket is to provide a direct link to the "Resource Console" in Q360. The Resource Console is a tool used for managing and viewing resource allocation, availability, and schedules, typically for project tasks and service calls.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Resource Console
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: My Projects

Path: Workflow > My Projects
Workflow No: 360Q723341

Purpose

The purpose of the My Projects workflow is to provide Project Managers with a centralized and dynamic dashboard to monitor and manage all aspects of their assigned projects. It offers a comprehensive overview of project statuses, upcoming tasks, potential risks such as overdue items or budget overruns, pending approvals for change orders and expenses, and material availability. This workflow aims to enhance project control, facilitate timely decision-making, and improve overall project management efficiency by consolidating key project-related information and actions into a single, accessible interface.

Benefits

- **Centralized Project Oversight**: Offers a single view for Project Managers to track all their assigned projects and related critical information.
- **Proactive Issue Identification**: Quickly highlights at-risk projects, overdue tasks, purchase orders (POs) without ETAs, or items with ETAs past their request dates.
- **Efficient Task Management**: Displays tasks due in current, next, and subsequent weeks, enabling better planning and resource allocation.
- **Budget Control**: Alerts to tasks that are over budget, allowing for timely corrective actions.
- **Change Order Management**: Provides visibility into open Customer Change Order (CCO) quotes and pending ICO (Internal Change Order) approvals.
- **Streamlined Expense Approvals**: Shows project-related expenses awaiting the Project Manager's approval.
- **Improved Material Tracking**: Highlights project equipment that has become available and POs with various ETA statuses.
- **Enhanced Project Monitoring**: Facilitates tracking of projects through different lifecycle stages, from data entry to accounting closeout.
- **Actionable Insights**: Direct links to detailed reports and relevant Q360 forms (e.g., Project Status, Resource Console) for deeper analysis and action.
- **Increased Productivity**: Reduces the time spent navigating multiple screens by consolidating key project metrics and alerts.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Dataentry Projects

The purpose of the Count of My Dataentry Projects bucket is to display the number of projects assigned to the current user that are in the "Dataentry" status. This allows Project Managers to quickly identify and prioritize new projects requiring initial setup, review, or planning before they can be moved to an active state.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects in 'Dataentry' status.
Constant Filter	Data includes projects from all branches.
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects for all customers.
Constant Filter	Data includes projects of all types.
Constant Filter	Restricted to projects where the Project Manager is the current user.
Constant Filter	Data includes projects associated with all salespersons.
Exclusion	Excludes records that are designated as project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filter criteria.
For this "Count of My Dataentry Projects" bucket, the report is specifically configured to retrieve projects that are assigned to the currently logged-in user and are in the 'Dataentry' status. This status typically indicates that these are newly initiated projects requiring further setup or review by the Project Manager. The report draws information primarily from project and customer records to list relevant project details.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No.	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Active Projects

The purpose of the Count of My Active Projects bucket is to display the number of projects assigned to the current user that are currently in an "Active" status. This allows Project Managers to quickly see how many ongoing projects they are managing that are not in preliminary stages like 'Dataentry' nor in closing stages like 'Substantially Completed' or 'Accounting'.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with an 'Active' status characteristic (specifically excluding 'Substantially Completed' and 'Accounting' statuses).
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects for all customers.
Constant Filter	Data includes projects of all types.
Constant Filter	Data includes projects of all statuses (this is further refined by the 'Active' status characteristic filter).
Constant Filter	Restricted to projects where the Project Manager is the current user.
Constant Filter	Data includes projects associated with all salespersons.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filter criteria.
For this "Count of My Active Projects" bucket, the report is configured to show projects assigned to the current user that are considered active. This means they are past the initial 'Dataentry' phase but have not yet reached 'Substantially Completed' or 'Accounting' closeout stages. This provides Project Managers with a focused view of their currently progressing projects.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No.	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Substantially Completed Projects

The purpose of the Count of My Substantially Completed Projects bucket is to display the number of projects assigned to the current user that have reached the "SUBSTCOMPL" (Substantially Completed) status. This signifies that the main project work is finished, and the project is typically ready for handoff to service and/or final accounting closeout.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with an 'Active' status characteristic.
Constant Filter	Data includes projects associated with all salespersons.
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects for all customers.
Constant Filter	Data includes projects of all types.
Constant Filter	Restricted to projects specifically in 'SUBSTCOMPL' (Substantially Completed) status.
Constant Filter	Restricted to projects where the Project Manager is the current user.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filter criteria.
For the "Count of My Substantially Completed Projects" bucket, the report is filtered to show projects assigned to the current user that are in the 'SUBSTCOMPL' status. This allows Project Managers to easily track projects that have reached this key milestone and may require follow-up actions for service transition or financial closure.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No.	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of My Projects In Accounting Closeout

The purpose of the Count of My Projects In Accounting Closeout bucket is to display the number of projects assigned to the current user that are in the "ACCOUNTING" status. This indicates these projects are in the final financial closing stages, typically managed by the accounting department after substantial completion and service handoff.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with an 'Active' status characteristic.
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects for all customers.
Constant Filter	Data includes projects of all types.
Constant Filter	Restricted to projects specifically in 'ACCOUNTING' status.
Constant Filter	Restricted to projects where the Project Manager is the current user.
Constant Filter	Data includes projects associated with all salespersons.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filter criteria.
For the "Count of My Projects In Accounting Closeout" bucket, the report is filtered to show projects assigned to the current user that are specifically in the 'ACCOUNTING' status. This allows Project Managers to monitor projects that are undergoing final financial reconciliation and closure processes.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No.	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Open CCO Quotes

The purpose of the Count of Open CCO Quotes bucket is to display the number of Customer Change Order (CCO) quotes related to the current user's projects that are currently open (not yet converted to an order or closed). This helps Project Managers track pending CCOs that require customer approval or further action.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes CCO quotes linked to projects that are already closed.
Constant Filter	Data includes CCO quotes from all departments.
Constant Filter	Data includes CCO quotes for all customers.
Constant Filter	Data includes CCO quotes for all sale types.
Constant Filter	Data includes CCO quotes associated with all salespersons.
Constant Filter	Restricted to CCO quotes where the Project Manager on the associated project is the current user.
Constant Filter	Restricted to quotes that are of type 'CCO' (Customer Change Order).
Constant Filter	Excludes CCO quotes that are already 'CONVERTED' (to an order) or 'CLOSED'.
Inclusion	Includes CCO quotes associated with all project types, provided other filter conditions are met.
Inclusion	Includes CCO quotes regardless of their specific status code, as long as they are not 'CONVERTED' or 'CLOSED'.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0132).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0132)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Quote_List** (Q0132). This report lists quotes associated with projects, based on various filter criteria.
For the "Count of Open CCO Quotes" bucket, the report is filtered to show quotes specifically of type 'CCO' (Customer Change Order) that are linked to projects managed by the current user. It further narrows down to CCOs that are not yet converted to an order or closed, highlighting those that are still active or awaiting approval.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Quote form for the specific CCO quote.
Contract No	The unique identifier for the CCO quote.
Company No.	The identifier of the financial entity associated with the quote.
Customer Name	The name of the customer associated with the quote.
Project No	The project number to which this CCO quote is linked.
Project Title	The title of the associated project.
Quote Title	The title or description of the CCO quote.
Date	The date the CCO quote was created.
Contact	The primary contact person for the CCO quote.
Saletype	The sale type associated with the CCO quote.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson on the CCO quote.
Status Code	The status of the CCO quote (e.g., DATAENTRY, AUTHORIZED).
Currency	The currency of the CCO quote.
Amount	The total amount of the CCO quote.
Branch	The branch associated with the CCO quote.
Department	The department associated with the CCO quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of CCO Orders Pending Approval

The purpose of the Count of CCO Orders Pending Approval bucket is to display the number of Customer Change Orders (CCOs) related to the current user's projects that have been converted from quotes and are now awaiting final approval (typically in 'CONFIRMED' status). This allows Project Managers to track CCOs that need to be processed to become active parts of the project.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes CCOs linked to projects that are already closed.
Constant Filter	Data includes CCOs from all departments.
Constant Filter	Data includes CCOs for all customers.
Constant Filter	Data includes CCOs for all sale types.
Constant Filter	Restricted to orders that are of type 'CCO' (Customer Change Order).
Constant Filter	Data includes CCOs associated with all salespersons.
Constant Filter	Restricted to CCOs where the Project Manager on the associated project is the current user.
Constant Filter	Restricted to CCOs that are in 'CONFIRMED' status.
Inclusion	Includes CCOs associated with all project types, provided other filter conditions are met.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0130).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0130)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Order_List** (Q0130). This report lists customer orders (contracts) associated with projects, based on various filter criteria.
For the "Count of CCO Orders Pending Approval" bucket, the report is filtered to show orders specifically of type 'CCO' (Customer Change Order) that are linked to projects managed by the current user and are in 'CONFIRMED' status. This status typically signifies that the CCO has been acknowledged by the customer (e.g., from an approved quote) and is now pending internal approval before its scope is officially added to the project.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Order form for the specific CCO.
Contract No	The unique identifier for the CCO.
Company No.	The identifier of the financial entity associated with the CCO.
Customer Name	The name of the customer associated with the CCO.
Project No	The project number to which this CCO is linked.
Project Title	The title of the associated project.
Quote Title	The title of the original quote from which this CCO was generated, if applicable.
Date	The date the CCO was created/confirmed.
Contact	The primary contact person for the CCO.
Sale Type	The sale type associated with the CCO.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson on the CCO.
Status Code	The status of the CCO (e.g., CONFIRMED).
Currency Type	The currency of the CCO.
Amount	The total amount of the CCO.
Branch	The branch associated with the CCO.
Department	The department associated with the CCO.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of ICO Orders Pending Approval

The purpose of the Count of ICO Orders Pending Approval bucket is to display the number of Internal Change Orders (ICOs) related to the current user's projects that are awaiting final approval (typically in 'CONFIRMED' status). This helps Project Managers track internal changes that need processing before their cost impact is formally recognized on the project.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/Exclusions:

Type	Description
Constant Filter	Excludes ICOs linked to projects that are already closed.
Constant Filter	Data includes ICOs from all departments.
Constant Filter	Data includes ICOs for all customers.
Constant Filter	Data includes ICOs for all sale types.
Constant Filter	Restricted to orders that are of type 'ICO' (Internal Change Order).
Constant Filter	Data includes ICOs associated with all salespersons.
Constant Filter	Restricted to ICOs where the Project Manager on the associated project is the current user.
Constant Filter	Restricted to ICOs that are in 'CONFIRMED' status.
Inclusion	Includes ICOs associated with all project types, provided other filter conditions are met.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0130).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0130)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Order_List** (Q0130). This report lists customer orders (contracts) associated with projects, based on various filter criteria.
For the "Count of ICO Orders Pending Approval" bucket, the report is filtered to show orders specifically of type 'ICO' (Internal Change Order). These orders are linked to projects managed by the current user and are in 'CONFIRMED' status, indicating they are ready for internal approval to adjust project costs or materials without affecting customer billing.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Order form for the specific ICO.
Contract No	The unique identifier for the ICO.
Company No.	The identifier of the financial entity associated with the ICO.
Customer Name	The name of the customer associated with the ICO.
Project No	The project number to which this ICO is linked.
Project Title	The title of the associated project.
Quote Title	The title of the original quote from which this ICO was generated, if applicable.
Date	The date the ICO was created/confirmed.
Contact	The primary contact person for the ICO.
Sale Type	The sale type associated with the ICO.
PM	The Project Manager of the associated project.
Sales Rep 1	The primary salesperson on the ICO.
Status Code	The status of the ICO (e.g., CONFIRMED).
Currency Type	The currency of the ICO.
Amount	The total amount of the ICO.
Branch	The branch associated with the ICO.
Department	The department associated with the ICO.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Expenses to Approve

The purpose of the Count of Expenses to Approve bucket is to display the number of expense items related to projects managed by the current user that are in 'PROJAPPROVAL' status, awaiting their review and approval.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to expense items that are in 'PROJAPPROVAL' queue type (awaiting project manager approval).
Constant Filter	Restricted to expense items where the Project Manager on the associated project is the current user.
Constant Filter	Data includes expense items for all projects, further filtered by Project Manager.
Constant Filter	Data includes expense items submitted by all users, further filtered by Project Manager.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Project Expense Queue
- **Parameters Passed:**
  - The 'projectleader' parameter of the target form is set using the current value of the workflow filter 'Proj Leader' (effectively the current user).
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'projectno' parameter of the target form is set to include "ALL" projects (though it will be further filtered by the Project Manager).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0303)

The data for this bucket is sourced from Report No: **WF_ExpenseClaimItem_List_ByQueue** (Q0303). This report lists expense claim items based on various queue types and filter criteria.
For the "Count of Expenses to Approve" bucket, the report is configured for the 'PROJAPPROVAL' queue type. This specifically retrieves expense items that have been submitted and are linked to projects where the current user is the Project Manager, and these expenses are awaiting the Project Manager's approval.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Item No	The unique identifier for the expense claim item.
Date	The date of the expense.
User ID	The User ID of the employee for whom the expense was incurred.
FullName	The full name of the employee.
Description	A description of the expense.
Category	The category of the expense (e.g., Meals, Travel).
Status	The status of the expense item (e.g., PROJAPPROVAL).
Qty	The quantity associated with the expense.
Amount	The amount of the expense before tax, in the item's currency.
Tax Amount	The tax amount for the expense, in the item's currency.
Total	The total amount of the expense (Amount + Tax Amount), in the item's currency. (Calculated)
Reimburse	Indicates if the expense is reimbursable to the employee ('Y'/'N').
Pay Method	The method of payment used for the expense.
Receipt Required	Indicates if a receipt is required for this expense category ('Y'/'N').
Comment	Additional comments or notes for the expense item.
Link Title	The title of the linked record (Project, Call, or Opportunity).
Project No	The project number if the expense is linked to a project.
Call No	The service call number if the expense is linked to a call.
Task No	The project task number if the expense is linked to a specific task.
Purchase No	The purchase order number if the expense is linked to a PO.
Oppor No	The opportunity number if the expense is linked to an opportunity.
Voucher No	The voucher number if the expense has been vouchered.
Customer No	The customer number associated with the linked project/call.
Fwd To Cust.	Indicates if the expense should be forwarded to the customer ('Y'/'N').
Submit Date	The date the expense item was submitted for approval.
Entity No.	The company/entity number associated with the expense.
Posted	Indicates if the expense has been posted ('Y'/'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Post Date	The date the expense was posted.
Approved By	The User ID of the person who approved the expense.
Branch	The branch associated with the expense.
Department	The department associated with the expense.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue Projects

The purpose of the Count of Overdue Projects bucket is to highlight projects assigned to the current user whose scheduled end date has passed but are not yet in a 'Substantially Completed' or 'Accounting' status. This serves as an immediate alert for Project Managers to investigate potential delays and take necessary actions.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with an 'Active' status characteristic.
Constant Filter	Includes only projects where the project's End Date is before the current system date.
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects for all customers.
Constant Filter	Data includes projects of all types.
Constant Filter	Data includes projects of all statuses (further refined by other status/date filters).
Constant Filter	Restricted to projects where the Project Manager is the current user.
Constant Filter	Data includes projects associated with all salespersons.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report returns a list of projects based on specified filter criteria.
For the "Count of Overdue Projects" bucket, the report identifies projects assigned to the current user that are still considered active (not yet substantially completed or in accounting) but whose planned end date has passed. This highlights projects that may be experiencing delays or require re-planning.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No.	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Tasks Over Budget

The purpose of the Count of Tasks Over Budget bucket is to display the number of project tasks where the actual time billed has exceeded the estimated effort (budget). This helps Project Managers identify tasks that are consuming more resources than planned, potentially impacting project profitability.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks belonging to projects that are 'COMPLETED' or 'CANCELED'.
Constant Filter	Data includes tasks from all departments.
Constant Filter	Data includes tasks of all types.
Constant Filter	Restricted to tasks where the Project Manager of the associated project is the current user, or the task is assigned to the current user.
Inclusion	Includes tasks where the total time billed (actual effort) is greater than the planned effort (budgeted effort from Scheduled task effort).
Inclusion	Includes tasks regardless of their specific status code, as long as they are not 'COMPLETED' or 'CANCELLED' and meet the over-budget criteria.
Exclusion	Excludes tasks from projects that are marked as templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0141).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0141)

The data for this bucket is sourced from Report No: **WF_Queue_Task_Over_Budget_List** (Q0141). This report lists project tasks where the accumulated billed time has surpassed the initially estimated effort.
For the "Count of Tasks Over Budget" bucket, the report is filtered to show such tasks related to projects managed by or tasks assigned to the current user. This provides Project Managers with a direct view of tasks that are exceeding their labor budget, enabling investigation into causes and potential mitigation strategies. The comparison is between the sum of Time billed for the task (and its sub-tasks) and the Scheduled task effort field.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No	The unique identifier for the project task.
Task Type	Indicates the task type.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer for the project.
PJ Title	The title of the project to which the task belongs.
Priority	The priority level of the task.
Title	The title or description of the task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type of the task.
Project Manager	The User ID of the Project Manager for the associated project.
Responsible	The contact name of the person responsible for the task.
Assignee	The full name of the user assigned to the task.
Est	The estimated duration for the task.
Est Unit	The unit for the estimated duration (e.g., Hours, Days).
Timebilled	The total time billed against the task (including sub-tasks), representing actual effort.
Status Code	The status of the task.
Category	The time billing category associated with the task.
Sub Category	The time billing sub-category associated with the task.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Tasks Overdue

The purpose of the Count of Tasks Overdue bucket is to display the number of project tasks assigned to or managed by the current user that have passed their scheduled end date but are not yet marked as 'COMPLETED' or 'CANCELLED'. This provides a critical alert for Project Managers to address tasks that are falling behind schedule.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks belonging to projects that are 'COMPLETED' or 'CANCELED'.
Constant Filter	Includes only tasks where the End Date is before the current system date and the task is assigned to the current user (as responsible or assignee).
Constant Filter	Data includes tasks from all departments.
Constant Filter	Restricted to tasks where the Project Manager of the associated project is the current user, or the task is directly assigned to the current user.
Constant Filter	Excludes tasks from projects that are marked as templates.
Inclusion	Includes tasks regardless of their specific status code, as long as they are not 'COMPLETED' or 'CANCELLED' and meet the date criteria.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria.
For the "Count of Tasks Overdue" bucket, the report is configured to show project tasks that are either assigned to the current user (as responsible or assignee) or belong to projects managed by the current user. It specifically filters for tasks whose scheduled end date has passed and whose status is not 'COMPLETED' or 'CANCELLED', highlighting tasks that require immediate attention due to being overdue.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which the task belongs.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer for the project.
Project Title	The title of the project to which the task belongs.
Priority	The priority level of the task.
Task Title	The title or description of the task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type of the task.
Project Manager	The User ID of the Project Manager for the associated project.
Responsible	The contact name of the person responsible for the task.
Assignee	The contact name of the person assigned to the task.
Est	The estimated duration or effort for the task.
Est Unit	The unit of the estimated duration or effort (e.g., Hours, Days).
Time Billed	The total time billed against the task and its sub-tasks.
Status Code	The status of the task (e.g., OPEN, INPROGRESS).
Category	The time billing category associated with the task.
Sub Cat	The time billing sub-category associated with the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due This Week

The purpose of the Count of Due This Week bucket is to display the number of project tasks that are scheduled to end within the current week and are not yet 'COMPLETED' or 'CANCELLED'. This helps Project Managers focus on tasks requiring immediate attention to meet near-term deadlines.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks belonging to projects that are 'COMPLETED' or 'CANCELED'.
Constant Filter	Includes only tasks where the End Date falls between the Sunday of the current week and the Saturday of the current week (inclusive).
Constant Filter	Data includes tasks from all departments.
Constant Filter	Restricted to tasks where the Project Manager of the associated project is the current user, or the task is directly assigned to the current user.
Constant Filter	Excludes tasks from projects that are marked as templates.
Inclusion	Includes tasks regardless of their specific status code, as long as they are not 'COMPLETED' or 'CANCELLED' and meet the "Due This Week" date criteria.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria.
For the "Count of Due This Week" bucket, the report is configured to show project tasks that are either assigned to the current user or belong to projects managed by the current user. It specifically filters for tasks whose scheduled end date falls within the current week (from the preceding Sunday to the upcoming Saturday) and are not yet completed or cancelled. This provides a focused view of immediate task deadlines.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which the task belongs.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer for the project.
Project Title	The title of the project to which the task belongs.
Priority	The priority level of the task.
Task Title	The title or description of the task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type of the task.
Project Manager	The User ID of the Project Manager for the associated project.
Responsible	The contact name of the person responsible for the task.
Assignee	The contact name of the person assigned to the task.
Est	The estimated duration or effort for the task.
Est Unit	The unit of the estimated duration or effort (e.g., Hours, Days).
Time Billed	The total time billed against the task and its sub-tasks.
Status Code	The status of the task (e.g., OPEN, INPROGRESS).
Category	The time billing category associated with the task.
Sub Cat	The time billing sub-category associated with the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due Next Week

The purpose of the Count of Due Next Week bucket is to display the number of project tasks scheduled to end in the upcoming week that are not yet 'COMPLETED' or 'CANCELLED'. This enables Project Managers to proactively plan for tasks due soon.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks belonging to projects that are 'COMPLETED' or 'CANCELED'.
Constant Filter	Includes only tasks where the End Date falls between the Sunday of the next week and the Saturday of the next week (inclusive).
Constant Filter	Data includes tasks from all departments.
Constant Filter	Restricted to tasks where the Project Manager of the associated project is the current user, or the task is directly assigned to the current user.
Constant Filter	Excludes tasks from projects that are marked as templates.
Inclusion	Includes tasks regardless of their specific status code, as long as they are not 'COMPLETED' or 'CANCELLED' and meet the "Due Next Week" date criteria.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria.
For the "Count of Due Next Week" bucket, the report is configured to show project tasks assigned to or managed by the current user. It specifically filters for tasks whose scheduled end date falls within the next calendar week (Sunday to Saturday) and are not yet completed or cancelled. This helps Project Managers anticipate upcoming workload and deadlines.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which the task belongs.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer for the project.
Project Title	The title of the project to which the task belongs.
Priority	The priority level of the task.
Task Title	The title or description of the task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type of the task.
Project Manager	The User ID of the Project Manager for the associated project.
Responsible	The contact name of the person responsible for the task.
Assignee	The contact name of the person assigned to the task.
Est	The estimated duration or effort for the task.
Est Unit	The unit of the estimated duration or effort (e.g., Hours, Days).
Time Billed	The total time billed against the task and its sub-tasks.
Status Code	The status of the task (e.g., OPEN, INPROGRESS).
Category	The time billing category associated with the task.
Sub Cat	The time billing sub-category associated with the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Due Week After

The purpose of the Count of Due Week After bucket is to display the number of project tasks scheduled to end in the week following next week, which are not yet 'COMPLETED' or 'CANCELLED'. This assists Project Managers in longer-term planning and resource forecasting.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes tasks belonging to projects that are 'COMPLETED' or 'CANCELED'.
Constant Filter	Includes only tasks where the End Date falls between the Sunday of the week after next and the Saturday of the week after next (inclusive).
Constant Filter	Data includes tasks from all departments.
Constant Filter	Restricted to tasks where the Project Manager of the associated project is the current user, or the task is directly assigned to the current user.
Constant Filter	Excludes tasks from projects that are marked as templates.
Inclusion	Includes tasks regardless of their specific status code, as long as they are not 'COMPLETED' or 'CANCELLED' and meet the "Due Week After Next" date criteria.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria.
For the "Count of Due Week After" bucket, the report is configured to show project tasks assigned to or managed by the current user. It specifically filters for tasks whose scheduled end date falls within the week following the next calendar week (Sunday to Saturday) and are not yet completed or cancelled. This aids in forward-looking task management and resource planning.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project Task form for the specific task.
Task No	The unique identifier for the project task.
Project No	The identifier of the project to which the task belongs.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer for the project.
Project Title	The title of the project to which the task belongs.
Priority	The priority level of the task.
Task Title	The title or description of the task.
Start Date	The scheduled start date of the task.
End Date	The scheduled end date of the task.
Type	The type of the task.
Project Manager	The User ID of the Project Manager for the associated project.
Responsible	The contact name of the person responsible for the task.
Assignee	The contact name of the person assigned to the task.
Est	The estimated duration or effort for the task.
Est Unit	The unit of the estimated duration or effort (e.g., Hours, Days).
Time Billed	The total time billed against the task and its sub-tasks.
Status Code	The status of the task (e.g., OPEN, INPROGRESS).
Category	The time billing category associated with the task.
Sub Cat	The time billing sub-category associated with the task.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs No ETA (Past 48 Hrs)

The purpose of the Count of POs No ETA (Past 48 Hrs) bucket is to highlight Purchase Order items related to the current user's projects that were created more than 48 hours ago, are still in 'DATAENTRY' or 'APPROVED' status (not yet received), and do not have an Estimated Time of Arrival (ETA) recorded. This helps Project Managers identify and follow up on POs that lack crucial delivery information, which could impact project scheduling.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Data includes Purchase Order items from all departments.
Constant Filter	Restricted to Purchase Order items where the Project Manager on the associated project is the current user.
Constant Filter	Includes only Purchase Order items where the ETA is not specified (blank) AND the Purchase Order status is 'CONFIRMED' or 'APPROVED' AND the PO was invoiced (created) more than 48 hours ago.
Inclusion	Includes Purchase Order items that are in 'DATAENTRY' status (not yet received).
Inclusion	Includes Purchase Order items linked to Order Items that are also in 'DATAENTRY' status.
Inclusion	Includes Purchase Order items associated with all project types, provided other filter conditions are met.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status, typically for items not yet received.
For the "Count of POs No ETA (Past 48 Hrs)" bucket, the report is filtered to identify Purchase Order items linked to projects managed by the current user. It specifically flags items on 'CONFIRMED' or 'APPROVED' Purchase Orders that were created over 48 hours ago but are still missing an ETA, indicating a need for follow-up with purchasing or vendors.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Purchase Order form for the specific Purchase Order.
PO Num	The Purchase Order number.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor for the Purchase Order.
Master No	The identifier for the master item on the Purchase Order line.
Description	The description of the item on the Purchase Order line.
PO Rls Date	The Purchase Order Release Date specified on the linked Order Item, if applicable.
Rqst Date	The delivery date requested on the linked Order Item, if applicable.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number to which this Purchase Order item is linked, if applicable.
Call No	The service call number if the Purchase Order item is linked via an order from a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	General notes associated with the Purchase Order header.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson on the linked customer order, if applicable.
DS	Indicates if the item is marked for drop shipment ('Y' or 'N').
Project Type	The type of the associated project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Overdue POs

The purpose of the Count of Overdue POs bucket is to display the number of Purchase Order items related to the current user's projects where the Estimated Time of Arrival (ETA) is past the current system date, and the items are still in 'DATAENTRY' status (not yet received). This helps Project Managers identify potential material delays that could impact project timelines.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Data includes Purchase Order items from all departments.
Constant Filter	Restricted to Purchase Order items where the Project Manager on the associated project is the current user.
Constant Filter	Includes only Purchase Order items where the ETA is before the current system date.
Inclusion	Includes Purchase Order items that are in 'DATAENTRY' status (not yet received).
Inclusion	Includes Purchase Order items linked to Order Items that are also in 'DATAENTRY' status.
Inclusion	Includes Purchase Order items associated with all project types, provided other filter conditions are met.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status, typically for items not yet received.
For the "Count of Overdue POs" bucket, the report is filtered to show Purchase Order items linked to projects managed by the current user. It specifically highlights items that are still in 'DATAENTRY' status (meaning not received) and whose ETA date has passed, indicating potential delays in material delivery.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Purchase Order form for the specific Purchase Order.
PO Num	The Purchase Order number.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor for the Purchase Order.
Master No	The identifier for the master item on the Purchase Order line.
Description	The description of the item on the Purchase Order line.
PO Rls Date	The Purchase Order Release Date specified on the linked Order Item, if applicable.
Rqst Date	The delivery date requested on the linked Order Item, if applicable.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number to which this Purchase Order item is linked, if applicable.
Call No	The service call number if the Purchase Order item is linked via an order from a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	General notes associated with the Purchase Order header.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson on the linked customer order, if applicable.
DS	Indicates if the item is marked for drop shipment ('Y' or 'N').
Project Type	The type of the associated project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs ETA Past Request

The purpose of the Count of POs ETA Past Request bucket is to display the number of Purchase Order items related to the current user's projects where the Estimated Time of Arrival (ETA) is later than the project's requested delivery date for that item. This helps Project Managers identify materials that are expected to arrive late, potentially impacting project schedules.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Data includes Purchase Order items from all departments.
Constant Filter	Restricted to Purchase Order items where the Project Manager on the associated project is the current user.
Constant Filter	Includes only Purchase Order items where the PO item's ETA is later than corresponding order item's requested date.
Inclusion	Includes Purchase Order items that are in 'DATAENTRY' status (not yet received).
Inclusion	Includes Purchase Order items linked to Order Items that are also in 'DATAENTRY' status.
Inclusion	Includes Purchase Order items associated with all project types, provided other filter conditions are met.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status, typically for items not yet received.
For the "Count of POs ETA Past Request" bucket, the report is filtered to show Purchase Order items linked to projects managed by the current user. It specifically identifies items where the vendor's ETA (PO item's ETA) is later than the date the project team requested the materials (order item's requested date). This highlights potential material-related schedule conflicts.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Purchase Order form for the specific Purchase Order.
PO Num	The Purchase Order number.
Branch	The branch associated with the Purchase Order.
Buyer ID	The identifier of the buyer who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor for the Purchase Order.
Master No	The identifier for the master item on the Purchase Order line.
Description	The description of the item on the Purchase Order line.
PO Rls Date	The Purchase Order Release Date specified on the linked Order Item, if applicable.
Rqst Date	The delivery date requested on the linked Order Item, if applicable.
ETA	The Estimated Time of Arrival for the Purchase Order item.
Project No	The project number to which this Purchase Order item is linked, if applicable.
Call No	The service call number if the Purchase Order item is linked via an order from a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	General notes associated with the Purchase Order header.
PM	The Project Manager of the associated project, if applicable.
CSR	The Customer Service Representative associated with the linked service call, if applicable.
Salesperson	The salesperson on the linked customer order, if applicable.
DS	Indicates if the item is marked for drop shipment ('Y' or 'N').
Project Type	The type of the associated project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Equipment Available

The purpose of the Count of Equipment Available bucket is to display the number of projects assigned to the current user where all required 'Q' (Quantity-based) and 'A' (Serialized Asset) type items have been picked and are ready for the next stage (e.g., shipping or installation). This helps Project Managers identify projects where materials are fully staged.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with an 'Active' status characteristic.
Constant Filter	Data includes projects from all departments.
Constant Filter	Data includes projects of all types.
Inclusion	Includes projects where the count of picked 'Q' and 'A' type items equals the total count of required (not cancelled, returned, shipped, or RMA'd) 'Q' and 'A' type items, and there is at least one such picked item.
Exclusion	Excludes project templates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0340).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0340)

The data for this bucket is sourced from Report No: **WF_Queue_Project_Equipment_Available** (Q0340). This report identifies projects where all necessary equipment items (quantity-based and serialized assets) have been picked from inventory.
For the "Count of Equipment Available" bucket, the report is filtered to show active projects assigned to the current user (based on workflow filters). It highlights projects where the total count of picked 'Q' and 'A' type items matches the total required quantity of such items for active orders, indicating that all tangible materials for these projects are staged and ready.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the detailed Project form for the specific project.
Project No	The unique identifier for the project.
Entity No.	The identifier of the financial entity associated with the project.
Customer Name	The name of the customer associated with the project.
Project Title	The title or name of the project.
Project Type	The type classification of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager assigned to the project.
Status Code	The status of the project.
Percent Complete	The system-calculated or manually set percentage of project completion.
Branch	The branch associated with the project.
Department	The department associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Unreviewed Project Events

The purpose of the Count of Unreviewed Project Events bucket is to display the number of project-related events that have been logged but not yet marked as reviewed by the current user (acting as Project Manager). This helps Project Managers stay informed about new updates, issues, or notes related to their projects.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Allows the user to filter the workflow data for a specific company/entity.	List		Current User's Company
Branch	User-selectable. Allows the user to filter workflow data based on a specific branch or view data for all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to project events where the Project Manager of the associated project is the current user.
Inclusion	Includes only project events that have not been reviewed (i.e., REVIEWDATE is blank/null).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0346).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0346)

The data for this bucket is sourced from Report No: **WF_ProjectEvents_Unreviewed** (Q0346). This report lists project events that are pending review.
For the "Count of Unreviewed Project Events" bucket, the report is filtered to show events linked to projects where the current user is the Project Manager. It specifically includes events that have a blank REVIEWDATE, indicating they have not yet been acknowledged or reviewed by the Project Manager.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Event No.	The unique identifier for the project event, providing a drilldown to the event details.
Project No.	The project number associated with the event, providing a drilldown to the project.
Project Title	The title of the project associated with the event.
Date	The date the event occurred or was logged.
Type	The type or category of the project event (e.g., NOTE, ISSUE, RISK).
Comment	The detailed comments or description of the event.
Entered By	The User ID of the person who entered the event.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Resource Console

The purpose of the Resource Console bucket is to provide a direct link to the Q360 Resource Console. This tool is used for viewing resource availability, scheduling resources to tasks, and managing overall resource allocation across projects and service calls.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Resource Console
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: My Projects Status

The purpose of the My Projects Status bucket is to provide a direct link to the "Project Status Quick View" screen. This allows Project Managers to quickly access a comprehensive report detailing the status and key metrics of their projects without needing to navigate through menus.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Project Status Quick View
- **Parameters Passed:**
  - The 'activeonly' parameter of the target form is set to "Y" (Yes), ensuring only active projects might be initially displayed or considered.
  - The 'asofdate' parameter of the target form is set to the current system date (Today).
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'department' parameter of the target form is set to "ALL", including all departments.
  - The 'category' parameter of the target form is set to "ALL", including all categories.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'projecttype' parameter of the target form is set to "ALL", including all project types.
  - The 'projectsubcat' parameter of the target form is set to "ALL", including all project subcategories.
  - The 'projectstatus' parameter of the target form is set to "ALL", including all project statuses.
  - The 'userid' parameter of the target form is set to the current user's ID, typically filtering the view to their projects.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Task Console

The purpose of the Task Console bucket is to provide a direct link to the Q360 Task Console. The Task Console is a comprehensive tool for managing and viewing tasks across various Q360 modules, offering advanced filtering and organizational capabilities beyond a simple task list.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Task Console
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Service Overview

Path: Workflow > Service Overview
Workflow No: 360Q723346

Purpose

The purpose of the Service Overview workflow is to provide a comprehensive, at-a-glance view of all key aspects related to service operations. It allows users to monitor service call lifecycles, track service contract statuses, manage service-related queues, and ensure adherence to Service Level Agreements (SLAs).

Benefits

- **Improved Service Call Management:** Quickly identify the status of all service calls, from open to closed, ensuring timely processing and resolution.
- **Enhanced Scheduling Efficiency:** Easily view calls that need scheduling, including new calls and return visits, optimizing resource allocation.
- **Proactive SLA Monitoring:** Track SLA violations for response and resolution times, enabling preemptive actions to meet customer commitments.
- **Better Contract Management:** Monitor active and expiring service contracts, facilitating timely renewals and reducing revenue leakage.
- **Streamlined Queue Management:** Provides direct access to critical service queues like Email, Dispatch, and Events, improving responsiveness.
- **Increased Operational Visibility:** Offers a centralized dashboard for service managers and CSRs to monitor key performance indicators.
- **Reduced Service Delays:** Highlights calls waiting for parts, needing quotes, or experiencing no activity, enabling quick intervention.
- **Optimized Resource Utilization:** By identifying bottlenecks and pending actions, resources can be directed more effectively.
- **Enhanced Customer Satisfaction:** Faster response times and proactive issue resolution lead to higher customer satisfaction.
- **Data-Driven Decision Making:** Provides quantitative data on service operations, supporting informed decisions for process improvements.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Email Q

The purpose of the Email Q bucket is to provide a direct link to the Received Email Queue in Q360. This queue lists incoming emails that may be related to service requests or customer communications, allowing users to process them, link them to existing service calls, or create new service calls from them.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Received Email Queue
- **Parameters Passed:**
    - The ‘type’ parameter of the target form is set using the current value of the workflow filter ‘EmailQService’.
    - The ‘branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Dispatch Q

The purpose of the Dispatch Q bucket is to provide a direct link to the Dispatch Queue in Q360. This queue is a central hub for managing and assigning service calls to technicians, allowing users to view unassigned calls, schedule resources, and track the progress of dispatched work.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Dispatch Queue
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘branch’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘department’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘calltype’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘customerno’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘tech’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘dispatchq’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘dispatchzone’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘status’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Open Calls

The purpose of the Count of Open Calls bucket is to display the total number of service calls that are currently in an "OPEN" status, indicating they have been logged but not yet scheduled, dispatched, or resolved. This provides a quick measure of the immediate incoming service demand.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "OPEN".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the 'Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Open Calls’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Scheduled Calls

The purpose of the Count of Scheduled Calls bucket is to display the total number of service calls that have been scheduled for a technician but have not yet been dispatched or attended to. This provides visibility into the upcoming workload for the service team.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "SCHEDULED".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'IncludeStatusCode' parameter of the target form is set using the current value of the workflow filter 'Scheduled'.
    - The 'ExcludeStatusCode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'Where' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'DispatchQ' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'UserID' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Dispatched Calls

The purpose of the Count of Dispatched Calls bucket is to show the total number of service calls that have been assigned to a technician and are in a "DISPATCHED" status. This indicates calls that are actively in progress or are imminently scheduled for a technician to attend.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "DISPATCHED".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Dispatched’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Events Q

The purpose of the Events Q bucket is to provide a direct link to the Events Queue in Q360. This queue displays a log of system-generated and manual events related to various entities like service calls or projects, enabling users to monitor activities, track changes, and stay informed about important updates.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Event Queue
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘tech’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘zone’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘dispatchq’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘ignoremyevents’ parameter of the target form is set using the current value of the workflow filter ‘Yes’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Tech Done Calls

The purpose of the Count of Tech Done Calls bucket is to display the total number of service calls that have been marked as "TECH DONE" by technicians. This status indicates that the technician believes they have completed the necessary work for the service call, and it is now pending review or further action by a CSR or service manager.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "TECH DONE".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Tech Done’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Completed Calls

The purpose of the Count of Completed Calls bucket is to display the total number of service calls that have been marked with a "COMPLETE" status. This status signifies that all necessary work, reviews, and administrative tasks for these calls have been finished, but they are not yet formally closed (which might involve final billing or archival).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "COMPLETE".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Complete’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Open Too Long

The purpose of the Count of Calls Open Too Long bucket is to identify and display service calls that have remained in an "OPEN" status for a duration exceeding a predefined threshold (e.g., 48 hours). This helps in prioritizing and addressing calls that may have been overlooked or are facing delays.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls that have been open for at least 48 hours.
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling for queue type.
Inclusion	Includes service calls with a status of "OPEN".

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0332).
- **Parameters Passed:**
    - The ‘QueueType’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Hours’ parameter of the target form is set using the current value of the workflow filter ‘Too Long Hours’.
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.

Bucket Data Source (Report No: Q0332)

The data for this bucket is sourced from Report No: **WF_Get_SuspectQ** (Q0332). This report is designed to identify and list "suspect" service calls based on various criteria, primarily focusing on calls that have exceeded certain time thresholds in specific statuses. It can filter calls by company, branch, department, call type, and queue type (e.g., DOWNTIME, OPENTIME).
The report queries the Dispatch table (service calls) and joins with Site information. The core logic revolves around the QueueType and Hours parameters. For example, if QueueType is ‘OPENTIME’, it finds calls in ‘OPEN’ status that have been open for more than Hours. Similar logic applies to ‘DOWNTIME’, ‘WAITPARTTIME’, and ‘DISPATCHEDTIME’. If no specific queue type is matched, it defaults to finding ‘OPEN’ calls exceeding the hour threshold.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call.
CallNo	Call number.
Product ID	The terminal ID or asset tag of the machine/product associated with the call, if applicable.
Date	The date the service call was created.
StatusCode	The status of the service call (e.g., OPEN, WAITPART).
SiteName	The name of the site where the service is required.
State	The state or province of the site address.
City	The city of the site address.
HotFlag	Indicates if the service call is marked as a high-priority or "hot" issue. This is configured via priority flag of the problem code.
DispatchQ	The dispatch queue to which the service call is assigned.
ProblemCode	A code representing the type of problem reported.
MachineDownFlag	Indicates if the machine or equipment related to the call is down.
Longitude	The geographical longitude of the service site.
Latitude	The geographical latitude of the service site.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of New Calls To Schedule

The purpose of the Count of New Calls To Schedule bucket is to display the total number of service calls that are newly created or in a status indicating they require scheduling ("TOSCHEDULE"). This helps service coordinators prioritize and assign these calls to technicians.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "TOSCHEDULE".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘To Schedule’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Return Visit To Schedule

The purpose of the Count of Return Visit To Schedule bucket is to display the total number of service calls that require a follow-up or return visit and are currently in a "RETRNVISIT" (Return Visit) status. This helps ensure that necessary subsequent appointments are not missed and are scheduled promptly.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "RETRNVISIT".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Return Visit’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Waiting Parts

The purpose of the Count of Calls Waiting Parts bucket is to display the total number of service calls that are currently on hold or delayed because they are awaiting the arrival or procurement of necessary parts. This helps in tracking and expediting parts delivery to resolve service calls efficiently.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "WAIT PARTS".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Wait Parts’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Needing Quotes

The purpose of the Count of Calls Needing Quotes bucket is to display the total number of service calls that are in a "NEED QUOTE" status. This indicates calls where a quotation for parts, labor, or additional services is required before proceeding with the work.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "NEED QUOTE".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Need Quote’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Incomplete Calls

The purpose of the Count of Incomplete Calls bucket is to show the total number of service calls that are marked with an "INCOMPLETE" status. This status usually signifies that the work attempted was not fully resolved or requires further attention before it can be considered tech-done or completed.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "INCOMPLETE".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Incomplete’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Closed Calls

The purpose of the Closed Calls bucket is to provide a view of all service calls that have been formally closed. This status typically means that all work, billing, and administrative processes related to these calls have been finalized and no further action is pending. This bucket does not display a count.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "CLOSED".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Closed’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls On Hold

The purpose of the Count of Calls On Hold bucket is to display the total number of service calls that are currently in an "ON HOLD" status. This status typically indicates that the call progression is temporarily paused, often awaiting customer response, parts, or other external factors.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "ON HOLD".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘On Hold’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Pending Customer

The purpose of the Count of Calls Pending Customer bucket is to display the total number of service calls that are currently awaiting a response or action from the customer. This status, "PENDCUST", indicates that the service provider is waiting for customer input, approval, or information before the call can proceed.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service calls with a status of "PENDCUST".
Constant Filter	Excludes service calls with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling.
Exclusion	Service calls linked to orders that are ‘SHIPPED’ or ‘CANCELLED’ are excluded.
Exclusion	Service calls where the linked purchase order status is ‘RECEIVED’ are excluded (if specific conditions in the ‘Where’ parameter are met).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Pending Customer’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘UserID’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, call type, status codes (inclusion/exclusion), branch, department, dispatch queue, and User ID. It is designed to provide a flexible view of service calls for workflow and queue management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Dispatch No	The unique internal identifier for the service call.
CallNo	Call number.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer associated with the service call.
Sitename	The name of the site where the service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, SCHEDULED, TECH DONE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call (e.g., REPAIR, PM, INSTALL).
Branch	The branch associated with the service call.
Department	The department responsible for the service call.
NextScheduledDate	The earliest upcoming scheduled start date for the service call. This is derived by looking at non-posted dispatch schedules for the call that are on or after the current date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Substantially Completed Projects

The purpose of the Count of Substantially Completed Projects bucket is to display the total number of projects that have reached the "SUBSTCOMPL" (Substantially Complete) status. This status indicates that the main work of the project is finished and the customer has beneficial use, though some final administrative tasks or formal closeout might still be pending.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to projects with a status code internally represented as "ACTIVE" when "SUBSTCOMPL" is the target filter value.
Constant Filter	Filters for projects based on "ALL" salespersons, implying no specific sales rep filter is applied.
Constant Filter	Excludes records with no status defined (blank status).
Constant Filter	Data is processed based on a filter with no specific user-facing value for "ps_Where", potentially for system integrity or default dataset handling.
Constant Filter	Filters for projects based on "ALL" customer numbers, implying no specific customer filter is applied.
Constant Filter	Filters for projects based on "ALL" project types, implying no specific project type filter is applied.
Constant Filter	Specifically includes projects with a status of "SUBSTCOMPL".
Constant Filter	Filters for projects based on "ALL" Project Managers, implying no specific Project Manager filter is applied.
Inclusion	Excludes projects with a record type of ‘TEMPLATE’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘IncludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Active’.
    - The ‘ExcludeStatusCode’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘Where’ parameter of the target form is set using the current value of the workflow filter ‘Blank’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘CustomerNo’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Statuscode’ parameter of the target form is set using the current value of the workflow filter ‘Substcompl’.
    - The ‘ProjectLeader’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘SalesRep’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report provides a list of projects based on various filter criteria including company, status codes (inclusion/exclusion), branch, department, customer, project type, Project Manager, and salesperson. It is designed to give users a way to query and view projects matching specific operational or managerial interests.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Project form.
ProjectNo	The unique identifier for the project.
Company No	The identifier of the company entity associated with the project.
Company	The name of the customer for whom the project is being executed.
Title	The title or name of the project.
Type	The type of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the project manager or leader assigned to the project.
Status Code	The status of the project (e.g., ACTIVE, SUBSTCOMPL).
Percent Complete	The calculated percentage of project completion.
Branch	The branch associated with the project.
Department	The department responsible for or associated with the project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Active Service Contracts

The purpose of the Active Service Contracts bucket is to provide a view of all service contracts that are currently in an "ACTIVE" status. This allows users to monitor ongoing service agreements with customers.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to service contracts with a status of "ACTIVE".
Constant Filter	Filters for service contracts based on "ALL" customer numbers, implying no specific customer filter is applied at this level.
Constant Filter	Filters for service contracts based on "ALL" contract types, implying no specific contract type filter is applied at this level.
Constant Filter	Filters for summary flag "Y" indicating that summary information should be displayed.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0180).
- **Parameters Passed:**
  - The ‘CustomerNo’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
  - The ‘ConType’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
  - The ‘ConStatus’ parameter of the target form is set using the current value of the workflow filter ‘Active’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

- The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
- The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
- The ‘SummaryFlag’ parameter of the target form is set using the current value of the workflow filter ‘Yes’.
- The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.

Bucket Data Source (Report No: Q0180)

The data for this bucket is sourced from Report No: **Service Contract List** (Q0180). This report returns a summarized list of service contracts.

For the "Active Service Contracts" bucket, the report is specifically configured to display only service contracts that are in an 'ACTIVE' status. The information is presented at a summary level for each contract, rather than detailing individual line items. This is achieved by retrieving header-level details from the Service Contract information, along with key related details from associated service contract items (Service Contract Item), covered products/systems, and primary site locations (Site), all aggregated to provide a contract-level overview. The report includes customer information, contract terms, primary covered product identification, and summarized financial totals for active service contracts.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed record. For the "Company" column, it links to the Customer record. For "Contract No", it links to the Service Contract record. For "Site Name", it links to the Site record. For "Product ID", it links to the Product record.
Company	The name of the customer associated with the service contract.
Contract No	The unique identifier for the service contract.
Site Name	The name of the primary shipping site associated with the service contract. In the summary view, this is derived from the Ship Company field of the service contract.
Address	The first line of the primary shipping address for the service contract. In the summary view, this is derived from the ShipAddress1 field of the service contract.
City	The city of the primary shipping address for the service contract. In the summary view, this is derived from the Ship City field of the service contract.
State	The state or province of the primary shipping address for the service contract. In the summary view, this is derived from the Ship State field of the service contract.
Zip	The postal code of the primary shipping address for the service contract. In the summary view, this is derived from the Ship Zip field of the service contract.
Product ID	The identifier of the primary product or system covered under the contract. If multiple products are covered, this shows an identifier based on an aggregation (maximum value of Product ID from Product information) in the summary view.
Model	The model of the primary product covered under the contract. If multiple products are covered, this shows a model based on an aggregation (maximum value of Model from Product information) in the summary view.
Title	The descriptive title of the service contract.
Start	The date when the service contract coverage begins.
End	The date when the service contract coverage ends.
Coverage	The type of coverage provided by the service contract (e.g., Warranty, Maintenance), derived from the Contract Type field of the service contract.
Amount	The total value of all items included in the service contract. This is calculated as the sum of the Total field for all associated Service Contract Item records.
Department	The department associated with the service contract.
SaleType	The sales type classification for the service contract.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Default Sorting

The Service Contract List report, when used for this bucket, is ordered by default in the following manner:

#	Column	Method
1	Company (Customer Name)	Ascending
2	Contract No	Ascending
3	Site Name (Ship Company)	Ascending
4	Address (Ship Address 1)	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Expiring Service Contracts

The purpose of the Count of Expiring Service Contracts bucket is to highlight the number of service contracts that are approaching their expiration date. This allows for proactive renewal management and engagement with customers.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Service contracts are filtered to show those expiring within the next 58 days, based on their End Date.
Constant Filter	Data is processed based on a filter with no specific user-facing value, potentially for system integrity or default dataset handling for block time balances.
Constant Filter	Filters for service contracts based on "ALL" types, implying no specific contract type filter is applied at this level for expiration.
Constant Filter	Filters for service contracts based on "ALL" salespersons, implying no specific sales rep filter is applied at this level for expiration.
Inclusion	Includes only service contracts where the status code (from general code ‘SCSTATUS’, field ‘codevalue3’) is ‘ACTIVE’.
Inclusion	Excludes service contract items of type ‘BLOCKAMT’.
Inclusion	If a Block Balance filter value is provided and is not zero, it includes contracts where the block amount balance is less than or equal to the filter value, and not zero. Otherwise, this specific block balance condition is not applied.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Service Contract Renewals
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'salesrep' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0101)

The data for this bucket is sourced from Report No: **WF_Get_Service ContractRenewalQ** (Q0101). This report lists service contract items that are nearing their expiration date or PO expiration date, or have a block balance below a certain threshold, to facilitate renewal processes. It filters contracts based on company, branch, department, salesperson, contract type, and specific date checks for expiration.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Contract form using the Contract Number.
Contractno	The unique identifier for the service contract.
Machineno	The identifier for the machine or product covered by the service contract item.
Description	The description of the service contract item.
Prodenddate	The end date of the specific product/service coverage within the contract item.
Contype	The type of the service contract (e.g., PREVENTATIVE MAINTENANCE, WARRANTY).
Company	The name of the customer holding the service contract.
Shipcompany	The name of the company at the shipping/service location.
Scenddate	The overall end date of the service contract.
Durationname	The billing frequency or duration name for the contract (e.g., ANNUAL, MONTHLY).
Total	The total value of the service contract.
Blocktimebalance	The remaining balance of block time (if applicable to the contract). This column is based on an older field and BlockAmountBalance is generally preferred for monetary balances.
Salesrep	The salesperson associated with the service contract.
Department	The department associated with the service contract.
Customerno	The unique identifier for the customer.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Subtype	The subtype of the customer (from customer record).
Monthlytotal	The monthly recurring revenue or cost associated with the contract.
Title	The title or name given to the service contract.
Currencytype	The currency in which the contract is valued.
RenewalType	Indicates how the contract renewal is handled (e.g., AUTO, NONE).
CurrencySymbol	The symbol for the contract's currency (e.g., $, €).
ContractItemNo	The unique identifier for the service contract line item.
BlockAmountBalance	The remaining monetary balance for block-based service contracts. If a block balance filter is active, this shows contracts at or below that balance (excluding zero).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Vendor Service Contract Renewal Q

The purpose of the Count of Vendor Service Contract Renewal Q bucket is to display the number of vendor service contract items that are due for renewal. This allows purchasing or service contract administrators to proactively manage renewals with vendors for services or subscriptions that are often resold to end customers.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for vendor service contract items with an end date within the next 60 days.
Constant Filter	Filters for items based on a contract type filter, which is set to "All" by default (effectively no specific type filter for this constant).
Inclusion	Includes only vendor service contract items where the Vendor Renewal Status Code is ‘ACTIVE’.
Inclusion	Includes only items where the vendor company name is not blank.
Inclusion	Includes only items associated with service contracts whose status code (from general code ‘SCSTATUS’, field ‘codevalue3’) is ‘ACTIVE’.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Vendor Service Contract Renewals Q
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'salesrep' parameter of the target form is set using the current value of the workflow filter 'SLA Overdue'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0350)

The data for this bucket is sourced from Report No: **Vendor Service Contract Renewal Q** (Q0350). This report lists service contract items that are linked to vendor services/subscriptions and are approaching their vendor-side expiration date, facilitating timely renewal with the vendor.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Contract form using the Contract Number.
ContractNo	The service contract number to which the vendor service item belongs.
CUSTOMERNO	The customer number associated with the service contract.
company	The name of the customer company.
branch	The branch associated with the service contract item.
contractitemno	The unique identifier for the service contract item.
Description	The description of the service contract item.
price	The price of the service contract item to the end customer.
ProdStartDate	The start date of the coverage for this item for the end customer.
ProdEndDate	The end date of the coverage for this item for the end customer.
SCStartDate	The start date of the parent service contract.
SCEndDate	The end date of the parent service contract.
vendorno	The vendor number for the supplier of this service/subscription.
Vendor	The name of the vendor company.
vendorstartdate	The start date of the coverage period with the vendor.
vendorenddate	The end date of the coverage period with the vendor (this is the primary date for renewal).
vendorcost	The cost of the service/subscription from the vendor.
vendorrefno	The vendor's reference number for this service/subscription.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
masterno	The master number representing this service item for the end customer.
qtyreorder	The quantity to reorder (typically 1 for service items).
vendormasterno	The master number or SKU used by the vendor for this service/subscription.
vendorfrequency	The frequency at which the vendor service is billed or renewed (e.g., ANNUAL).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls with No Activity 1 Hour

The purpose of the Count of Calls with No Activity 1 Hour bucket is to highlight service calls that have not had any logged activity (events or status changes) for at least 1 hour but less than 4 hours. This helps identify calls that might be stalling or require attention to ensure they are progressing.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with no activity for a minimum of 1 hour.
Constant Filter	Filters for calls with no activity for a maximum of 4 hours.
Constant Filter	Data is processed based on a filter for "ALL" call statuses, implying no specific status filter unless overridden by other parameters.
Constant Filter	Data is processed based on a filter for "ALL" users, implying no specific user filter for CSR/Tech.
Constant Filter	Data is processed based on a filter for "ALL" dispatch queues.
Inclusion	Excludes calls with a status code that is considered ‘INACTIVE’ (based on CodeValue2 in the Code table for CALLSTATUS) unless the ‘ActiveOnly’ flag is ‘N’. By default, it includes only ‘ACTIVE’ state calls.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘CallStatus’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Min Hours’ parameter of the target form is set using the current value of the workflow filter ‘One’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘UserId’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Max Hours’ parameter of the target form is set using the current value of the workflow filter ‘Four’.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report lists service calls that have had no logged events for a specified minimum and maximum number of hours. It helps identify calls that may be stalled or require follow-up.
The report filters calls from the Dispatch table based on company, call status, call type, assigned user (CSR/Tech), branch, department, and dispatch queue. It determines the Last Event Date for each call by finding the maximum date from its event records. The core filtering logic then selects calls where the duration between this Last Event Date and the current system time falls within the Min Hours and Max Hours range. An additional filter Active Only can restrict results to calls with statuses marked as ‘ACTIVE’ in their general code definition.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Date	The creation date of the service call.
Priority	The priority level assigned to the service call.
Callno	Call number.
Company	The name of the customer associated with the service call.
Sitename	The name of the site where service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call.
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call.
Dispatchno	The unique internal identifier for the service call.
Lasteventdate	The date and time of the last recorded activity or event for the service call.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls with No Activity 4 Hours

The purpose of the Count of Calls with No Activity 4 Hours bucket is to highlight service calls that have not had any logged activity for at least 4 hours but less than 24 hours. This helps identify calls that may be significantly stalled and require prompt attention.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with no activity for a minimum of 4 hours.
Constant Filter	Filters for calls with no activity for a maximum of 24 hours.
Constant Filter	Data is processed based on a filter for "ALL" call statuses, implying no specific status filter unless overridden by other parameters.
Constant Filter	Data is processed based on a filter for "ALL" users, implying no specific user filter for CSR/Tech.
Constant Filter	Data is processed based on a filter for "ALL" dispatch queues.
Inclusion	Excludes calls with a status code that is considered ‘INACTIVE’ (based on CodeValue2 in the Code table for CALLSTATUS) unless the ‘ActiveOnly’ flag is ‘N’. By default, it includes only ‘ACTIVE’ state calls.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘CallStatus’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Min Hours’ parameter of the target form is set using the current value of the workflow filter ‘Four’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘UserId’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Max Hours’ parameter of the target form is set using the current value of the workflow filter ‘TwentyFour’.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report lists service calls that have had no logged events for a specified minimum and maximum number of hours. It helps identify calls that may be stalled or require follow-up.
The report filters calls from the Dispatch table based on company, call status, call type, assigned user (CSR/Tech), branch, department, and dispatch queue. It determines the Last Event Date for each call by finding the maximum date from its event records. The core filtering logic then selects calls where the duration between this Last Event Date and the current system time falls within the Min Hours and Max Hours range. An additional filter Active Only can restrict results to calls with statuses marked as ‘ACTIVE’ in their general code definition.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Date	The creation date of the service call.
Priority	The priority level assigned to the service call.
Callno	Call number.
Company	The name of the customer associated with the service call.
Sitename	The name of the site where service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call.
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call.
Dispatchno	The unique internal identifier for the service call.
Lasteventdate	The date and time of the last recorded activity or event for the service call.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls with No Activity 24 Hours

The purpose of the Count of Calls with No Activity 24 Hours bucket is to highlight service calls that have not had any logged activity for at least 24 hours but less than 48 hours. This indicates calls that have been inactive for a considerable period and likely require urgent review and action.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with no activity for a minimum of 24 hours.
Constant Filter	Filters for calls with no activity for a maximum of 48 hours.
Constant Filter	Data is processed based on a filter for "ALL" call statuses, implying no specific status filter unless overridden by other parameters.
Constant Filter	Data is processed based on a filter for "ALL" users, implying no specific user filter for CSR/Tech.
Constant Filter	Data is processed based on a filter for "ALL" dispatch queues.
Inclusion	Excludes calls with a status code that is considered ‘INACTIVE’ (based on CodeValue2 in the Code table for CALLSTATUS) unless the ‘ActiveOnly’ flag is ‘N’. By default, it includes only ‘ACTIVE’ state calls.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The ‘Company No’ parameter of the target form is set using the current value of the workflow filter ‘Company No’.
    - The ‘CallStatus’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Min Hours’ parameter of the target form is set using the current value of the workflow filter ‘TwentyFour’.
    - The ‘Type’ parameter of the target form is set using the current value of the workflow filter ‘Call Type’.
    - The ‘UserId’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘List’ parameter of the target form is set using the current value of the workflow filter ‘List’.
    - The ‘DispatchQ’ parameter of the target form is set using the current value of the workflow filter ‘ALL’.
    - The ‘Max Hours’ parameter of the target form is set using the current value of the workflow filter ‘FortyEight’.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report lists service calls that have had no logged events for a specified minimum and maximum number of hours. It helps identify calls that may be stalled or require follow-up.
The report filters calls from the Dispatch table based on company, call status, call type, assigned user (CSR/Tech), branch, department, and dispatch queue. It determines the Last Event Date for each call by finding the maximum date from its event records. The core filtering logic then selects calls where the duration between this Last Event Date and the current system time falls within the Min Hours and Max Hours range. An additional filter Active Only can restrict results to calls with statuses marked as ‘ACTIVE’ in their general code definition.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Date	The creation date of the service call.
Priority	The priority level assigned to the service call.
Callno	Call number.
Company	The name of the customer associated with the service call.
Sitename	The name of the site where service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call.
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call.
Dispatchno	The unique internal identifier for the service call.
Lasteventdate	The date and time of the last recorded activity or event for the service call.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls with No Activity 48 Hours

The purpose of the Count of Calls with No Activity 48 Hours bucket is to identify and display service calls that have had no logged activity for 48 hours or more. These calls represent a significant lack of progress and require immediate investigation and action to prevent further delays or customer dissatisfaction.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with no activity for a minimum of 48 hours.
Constant Filter	Data is processed based on a filter for "ALL" call statuses, implying no specific status filter unless overridden by other parameters.
Constant Filter	Data is processed based on a filter for "ALL" users, implying no specific user filter for CSR/Tech.
Constant Filter	Data is processed based on a filter for "ALL" dispatch queues.
Constant Filter	The maximum hours filter is effectively unbounded for this bucket, including all calls with inactivity beyond 48 hours.
Constant Filter	Ensures only calls considered "Active" (based on the ActiveOnly parameter, typically ‘Y’) are included.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Type	Description
Inclusion	Excludes calls with a status code that is considered 'INACTIVE' (based on CodeValue2 in the Code table for CALLSTATUS) unless the 'ActiveOnly' flag is 'N'. By default, it includes only 'ACTIVE' state calls.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'CallStatus' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'Min Hours' parameter of the target form is set using the current value of the workflow filter 'FortyEight'.
  - The 'Type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
  - The 'UserId' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'DispatchQ' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'Max Hours' parameter of the target form is set using the current value of the workflow filter 'Blank'.
  - The 'ActiveOnly' parameter of the target form is set using the current value of the workflow filter 'Yes'.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report lists service calls that have had no logged events for a specified minimum and maximum number of hours. It helps identify calls that may be stalled or require follow-up.
The report filters calls from the Dispatch table based on company, call status, call type, assigned user (CSR/Tech), branch, department, and dispatch queue. It determines the Last Event Date for each call by finding the maximum date from its event records. The core filtering logic then selects calls where the duration between this Last Event Date and the current system time falls within the Min Hours and Max Hours range. An additional filter Active Only can restrict results to calls with statuses marked as 'ACTIVE' in their general code definition.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a hyperlink to navigate directly to the detailed Service Call form.
Date	The creation date of the service call.
Priority	The priority level assigned to the service call.
Callno	Call number.
Company	The name of the customer associated with the service call.
Sitename	The name of the site where service is required.
Caller	The name of the person who reported the issue or requested service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call.
Statuscode	The status of the service call.
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported.
Problem	A description of the problem or reason for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the service.
Calltype	The sale type of the service call.
Dispatchno	The unique internal identifier for the service call.
Lasteventdate	The date and time of the last recorded activity or event for the service call.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Response Violation within 240 Minutes

The purpose of the Count of SLA Response Violation within 240 Minutes bucket is to identify and display the number of service calls where the response time is projected to violate the Service Level Agreement (SLA) within the next 240 minutes (4 hours), or has already violated it but is still within this time window from the target. This helps in prioritizing calls that are at moderate risk of breaching their response SLA.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Response is between 121 and 240 minutes.
Constant Filter	Focuses specifically on "RESPONSE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 121 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 240 Minutes'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Response'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL' Call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Response Violation within 120 Minutes

The purpose of the Count of SLA Response Violation within 120 Minutes bucket is to identify and display the number of service calls where the response time is projected to violate the Service Level Agreement (SLA) within the next 120 minutes (2 hours), or has already violated it but is still within this time window from the target. This helps in prioritizing calls that are at high risk of breaching their response SLA.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Response is between 61 and 120 minutes.
Constant Filter	Focuses specifically on "RESPONSE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 61 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 120 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Response'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL' Call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Response Violation within 60 Minutes

The purpose of the Count of SLA Response Violation within 60 Minutes bucket is to identify and display the number of service calls where the response time is projected to violate the Service Level Agreement (SLA) within the next 60 minutes (1 hour), or has already violated it but is still within this time window from the target. This highlights calls that are at very high risk of breaching their response SLA and require immediate attention.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Response is between 0 and 60 minutes.
Constant Filter	Focuses specifically on "RESPONSE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 0 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 60 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Response'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Response Violation OVERDUE

The purpose of the Count of SLA Response Violation OVERDUE bucket is to display the total number of service calls where the response time has already breached the Service Level Agreement (SLA). This bucket highlights calls that require immediate escalation and action to mitigate the impact of the SLA violation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Response is less than 0 minutes (i.e., overdue). The min minutes parameter is set to a very large negative number to capture all overdue calls.
Constant Filter	Focuses specifically on "RESPONSE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA Overdue'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 0 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Response'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Resolve Violation within 240 Minutes

The purpose of the Count of SLA Resolve Violation within 240 Minutes bucket is to identify and display the number of service calls where the resolution time is projected to violate the Service Level Agreement (SLA) within the next 240 minutes (4 hours), or has already violated it but is still within this time window from the target. This helps in prioritizing calls that are at moderate risk of breaching their resolution SLA.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Resolution is between 121 and 240 minutes.
Constant Filter	Focuses specifically on "RESOLVE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 121 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 240 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Resolve'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Resolve Violation within 120 Minutes

The purpose of the Count of SLA Resolve Violation within 120 Minutes bucket is to identify and display the number of service calls where the resolution time is projected to violate the Service Level Agreement (SLA) within the next 120 minutes (2 hours), or has already violated it but is still within this time window from the target. This helps in prioritizing calls that are at high risk of breaching their resolution SLA.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Resolution is between 61 and 120 minutes.
Constant Filter	Focuses specifically on "RESOLVE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 61 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 120 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Resolve'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Resolve Violation within 60 Minutes

The purpose of the Count of SLA Resolve Violation within 60 Minutes bucket is to identify and display the number of service calls where the resolution time is projected to violate the Service Level Agreement (SLA) within the next 60 minutes (1 hour), or has already violated it but is still within this time window from the target. This highlights calls that are at very high risk of breaching their resolution SLA and require immediate attention.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Resolution is between 0 and 60 minutes.
Constant Filter	Focuses specifically on "RESOLVE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 0 Minutes'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 60 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Resolve'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of SLA Resolve Violation OVERDUE

The purpose of the Count of SLA Resolve Violation OVERDUE bucket is to display the total number of service calls where the resolution time has already breached the Service Level Agreement (SLA). This bucket highlights calls that require immediate escalation and action to mitigate the impact of the SLA violation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter controls the company entity for which the workflow data is displayed. Changing it allows viewing service operations for different trading entities.	List		Current User's Company
Branch	User-selectable. This filter narrows down the workflow data to a specific branch. Users can select a branch to focus on its service activities.	List		Current User's Branch
Department	User-selectable. This filter restricts the workflow data to a particular department. It helps in analyzing service performance within specific operational units.	List		ALL
Call Type	User-selectable. This filter allows users to view service calls of a specific sale type (e.g., "INSTALL", "REPAIR"). It helps in categorizing and analyzing call data.	General Code: UNIFIEDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls where the remaining time for SLA Resolution is less than 0 minutes (i.e., overdue). The min minutes parameter is set to a very large negative number to capture all overdue calls.
Constant Filter	Focuses specifically on "RESOLVE" type SLA violations.
Inclusion	Includes calls regardless of their status (unless filtered out by ‘CallStatus’ if it were used with specific values). By default, ‘CallStatus’ is ‘ALL’.
Inclusion	Includes calls for all users (CSR/Tech) unless specifically filtered.
Inclusion	Includes calls for all dispatch queues unless specifically filtered.
Inclusion	Considers calls where Service Coverage Hours ‘Response Type’ (events marking a response) and ‘Resolve Type’ (events marking resolution) are defined.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0344).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'Minimum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA Overdue'.
    - The 'Maximum Minutes' parameter of the target form is set using the current value of the workflow filter 'SLA 0 Minutes'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'ViolationCheck' parameter of the target form is set using the current value of the workflow filter 'Violation Resolve'.
    - The 'CallType' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0344)

The data for this bucket is sourced from Report No: **WF_Queue_Call_SLA_Violation** (Q0344). This report identifies service calls that are in violation of or are approaching violation of their Service Level Agreements (SLAs) for response or resolution times. It calculates the time elapsed and time remaining based on the call's creation/event dates and the SLA parameters defined in the associated service coverage.
The report logic involves several steps:

1. It filters service calls from the Dispatch table based on company, call status (flexible, can include active statuses), call type, assigned user (CSR/Tech), branch, department, and dispatch queue.
2. It links to Service Contract and Service Coverage to get SLA-specific details like response/resolve target times for different priorities, and the event types that signify a response or resolution.
3. It determines the call's effective creation time (either from a 'NEWCALL'-type call event or the call's add date).
4. It identifies the actual response and resolution dates by looking for specific event types (defined in Service Coverage Response Type and Service Coverage Resolve Type) in the call events table. If these events haven't occurred, the current time is used for calculation.
5. It calculates Elapsed Response Time (Minutes) and Elapsed Resolve Time (Minutes) considering the service coverage hours (e.g., business hours).
6. It determines the Target Response Time and Target Resolve Time based on the call's priority and the SLA definitions in Service Coverage.
7. The main filtering condition checks if the Remaining Response Time (calculated as Target Response Time - Elapsed Response Time (Minutes)) or Remaining Resolve Time falls within the Minimum Minutes and Maximum Minutes range specified, and if the call hasn't already been flagged as responded/resolved for the specific violation type being checked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The final output lists calls meeting these SLA violation criteria, along with details about their SLA timings.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Dispatch No	Hidden unique identifier for the service call.
Call No	The user-friendly number for the service call. Provides a zoom to the Service Call form.
Creation Date	The date and time the service call was effectively created (either Call add date or the date of the 'NEWCALL' event).
Call Status	The status of the service call (e.g., OPEN, SCHEDULED).
Contract No	The service contract number associated with the call. Provides a zoom to the Service Contract form.
Coverage No	The service coverage profile number linked to the call's contract. Provides a zoom to the Service Coverage form.
Site No	Hidden unique identifier for the service site.
SiteName	The name of the site where service is required. Provides a zoom to the Site form.
Priority	The priority level assigned to the service call.
Response Min Elapsed	The actual minutes elapsed for responding to the call, calculated considering service coverage hours.
Resolve Min Elapsed	The actual minutes elapsed for resolving the call, calculated considering service coverage hours.
Response Target Time	The target response time in minutes for the call based on its priority and SLA.
Resolve Target Time	The target resolution time in minutes for the call based on its priority and SLA.
Response Time Remaining	The calculated time remaining (in minutes) to meet the response SLA. Can be negative if overdue.
Resolve Time Remaining	The calculated time remaining (in minutes) to meet the resolution SLA. Can be negative if overdue.
Responded	Indicates if a response event (as defined in the SLA) has been logged for the call ('Y' or 'N').
Resolved	Indicates if a resolution event (as defined in the SLA) has been logged for the call ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: My Calls

Path: Workflow > My Calls
Workflow No: 360Q723340

Purpose

The purpose of the My Calls workflow is to provide users, such as Customer Service Representatives (CSRs) or Technicians, with a personalized and actionable dashboard to monitor and manage service calls relevant to their responsibilities. It categorizes calls by various statuses (New, Work In Progress, Tech Done, Completed), highlights calls requiring urgent attention (e.g., open for extended periods, awaiting parts, or showing no recent activity), and allows users to efficiently track their workload and prioritize actions to ensure timely service delivery.

Benefits

- **Improved Visibility**: Gain a clear and consolidated view of assigned or relevant service calls.
- **Enhanced Prioritization**: Quickly identify calls needing immediate attention, such as those open for extended durations or lacking activity.
- **Efficient Workload Management**: Track calls through different stages (New, Work In Progress, Tech Done, Completed) for better workflow management.
- **Proactive Issue Resolution**: Monitor calls awaiting parts or those stalled, enabling proactive follow-up.
- **Increased Productivity**: Streamline call handling by providing quick access to call statuses and details.
- **Reduced Response Times**: By highlighting aged or inactive calls, users can address potential delays more effectively.
- **Data-Driven Decision Making**: Drill down into call details to understand context and make informed decisions.
- **Personalized Call Tracking**: Filters allow users to focus on calls specific to their entity, branch, department, or themselves.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow Filters

The data displayed in this workflow can be refined using the following filters:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of New Calls

The purpose of the Count of New Calls bucket is to display the number of new service calls that are typically awaiting initial action or assignment and are relevant to the current user's filters.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with a status of 'OPEN'.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional status codes are excluded by default.
Constant Filter	No additional specific WHERE clause conditions are applied by default.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
  - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Open Calls'.
  - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
  - The 'where' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

- The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
- The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Work In Progress

The purpose of the Count of Work In Progress bucket is to display the number of service calls that are currently being actively worked on, or are in a state between new and resolved, relevant to the current user's filters.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Excludes calls with statuses of 'OPEN', 'COMPLETE', or 'CLOSED' as defined by the 'Work In Progress Calls' system filter logic which is used as an exclusion list. This implies it shows calls in other active states.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional specific status codes are included by default beyond the logic derived from the 'Work In Progress Calls' filter.
Constant Filter	No additional specific WHERE clause conditions are applied by default.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Work In Progress Calls'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Tech Done

The purpose of the Count of Tech Done bucket is to display the number of service calls that have been marked as 'Technician Done' by the attending technician, indicating field work is complete but awaiting final review or processing.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with a status of 'TECH DONE'.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional status codes are excluded by default.
Constant Filter	No additional specific WHERE clause conditions are applied by default.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
  - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Tech Done'.
  - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

- The 'where' parameter of the target form is set using the current value of the workflow filter 'Blank'.
- The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
- The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Completed Calls

The purpose of the Count of Completed Calls bucket is to display the number of service calls that have been fully processed and marked as 'Complete', typically ready for billing or final closure.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with a status of 'COMPLETE'.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional status codes are excluded by default.
Constant Filter	No additional specific WHERE clause conditions are applied by default.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
  - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Complete'.
  - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
  - The 'where' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

- The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
- The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Open Calls > 1 hr

The purpose of the Count of Open Calls > 1 hr bucket is to highlight service calls that have been in an 'OPEN' status for more than one hour, potentially indicating a need for timely attention or escalation.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with a status of 'OPEN'.
Constant Filter	Filters for calls that have been open for more than 1 hour, based on the last event date.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'callstatus' parameter of the target form is set using the current value of the workflow filter 'Open Calls'.
    - The 'pn_minhours' parameter of the target form is set using the current value of the workflow filter 'Open 1hr'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'pn_maxhours' parameter of the target form is set using the current value of the workflow filter 'Open 3hrs'.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report identifies service calls that have been open or have not had any recorded activity for a specified minimum duration (and optionally within a maximum duration). It is designed to highlight calls that might require attention due to prolonged open times or inactivity.
The report considers various filter parameters such as Company, Call Status (e.g., 'OPEN'), Call Type, User ID, List, List, and Dispatch Queue. A key feature is its ability to filter calls based on the duration since their last event (Last Event Date), using minimum and maximum hour thresholds. By default, it focuses on active calls, but can include others if specified. This helps in managing service level agreements and ensuring timely responses to customer issues.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Call No	The user-facing number for the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call.
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Dispatch No	The unique internal identifier for the service call.
Last Event Date	The date and time of the last recorded event or activity on the service call.

Default Sorting

The WF_Queue_Call_No_Activity_List report is ordered by default in the following manner:

#	Column	Method
1	Call No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Open Calls > 3 hrs

The purpose of the Count of Open Calls > 3 hrs bucket is to highlight service calls that have remained in an 'OPEN' status for more than three hours, signaling a higher urgency for review and action.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Filters for calls with a status of 'OPEN'.
Constant Filter	Filters for calls that have been open for more than 3 hours, based on the last event date.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	Also filters for calls with no activity for less than 24 hours (as per pn_MaxHours mapping to NOACT24).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'callstatus' parameter of the target form is set using the current value of the workflow filter 'Open Calls'.
    - The 'pn_minhours' parameter of the target form is set using the current value of the workflow filter 'Open 3hrs'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'pn_maxhours' parameter of the target form is set using the current value of the workflow filter 'No Activity 24'.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report identifies service calls that have been open or have not had any recorded activity for a specified minimum duration (and optionally within a maximum duration). It is designed to highlight calls that might require attention due to prolonged open times or inactivity.
The report considers various filter parameters such as Company, Call Status (e.g., 'OPEN'), Call Type, User ID, List, List, and Dispatch Queue. A key feature is its ability to filter calls based on the duration since their last event (Last Event Date), using minimum and maximum hour thresholds. By default, it focuses on active calls, but can include others if specified. This helps in managing service level agreements and ensuring timely responses to customer issues.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Call No	The user-facing number for the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call.
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Dispatch No	The unique internal identifier for the service call.
Last Event Date	The date and time of the last recorded event or activity on the service call.

Default Sorting

The WF_Queue_Call_No_Activity_List report is ordered by default in the following manner:

#	Column	Method
1	Call No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Waiting Parts

The purpose of the Count of Calls Waiting Parts bucket is to display service calls that are currently on hold or delayed because they are awaiting necessary parts for resolution.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to calls associated with an Order (Contract) that has not yet been fully shipped or cancelled.
Constant Filter	Excludes calls with statuses of 'OPEN', 'COMPLETE', or 'CLOSED' as per the 'Work In Progress Calls' filter used for exclusion logic.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional specific status codes are included by default beyond those implied by the 'Work In Progress Calls' and 'Wait Parts' filters.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Work In Progress Calls'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Wait Parts'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls Waiting Parts > 3 days

The purpose of the Count of Calls Waiting Parts > 3 days bucket is to highlight service calls that have been awaiting parts for more than three days, indicating a potentially significant delay that requires urgent follow-up.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to calls associated with an Order (Contract) that has not been fully shipped or cancelled, and where the Order date (ContractDate) is three or more days in the past.
Constant Filter	Excludes calls with statuses of 'OPEN', 'COMPLETE', or 'CLOSED' as per the 'Work In Progress Calls' filter used for exclusion logic.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	No additional specific status codes are included by default beyond those implied by the 'Work In Progress Calls' and 'Wait Parts > 3 Days' filters.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Work In Progress Calls'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Wait Parts > 3 Days'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a detailed list of service calls based on a comprehensive set of filters. It retrieves information about each call, including its status, priority, associated customer and site, reported problem, assigned personnel (CSR and technician), and scheduling details.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Dispatch No	The unique internal identifier for the service call.
Call No	The user-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call (e.g., OPEN, SCHEDULED).
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Branch	The branch associated with the service call.
Department	The department associated with the service call.
Next Scheduled Date	The earliest upcoming scheduled date for the service call, considering only non-posted schedules from today onwards.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls w/ No Activity > 24 hrs

The purpose of the Count of Calls w/ No Activity > 24 hrs bucket is to identify service calls across all statuses that have not had any recorded activity for more than 24 hours, helping to ensure calls are not being neglected.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes calls of all statuses (as 'All Call Statuses' filter is set to 'ALL').
Constant Filter	Filters for calls where the last recorded event was more than 24 hours ago.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.
Constant Filter	Also filters for calls with no activity for less than 48 hours (as per pn_MaxHours mapping to NOACT48).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'callstatus' parameter of the target form is set using the current value of the workflow filter 'All Call Statuses'.
    - The 'pn_minhours' parameter of the target form is set using the current value of the workflow filter 'No Activity 24'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'pn_maxhours' parameter of the target form is set using the current value of the workflow filter 'No Activity 48'.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report identifies service calls that have been open or have not had any recorded activity for a specified minimum duration (and optionally within a maximum duration). It is designed to highlight calls that might require attention due to prolonged open times or inactivity.
The report considers various filter parameters such as Company, Call Status (e.g., 'OPEN'), Call Type, User ID, List, List, and Dispatch Queue. A key feature is its ability to filter calls based on the duration since their last event (Last Event Date), using minimum and maximum hour thresholds. By default, it focuses on active calls, but can include others if specified. This helps in managing service level agreements and ensuring timely responses to customer issues.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Call No	The user-facing number for the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call.
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Dispatch No	The unique internal identifier for the service call.
Last Event Date	The date and time of the last recorded event or activity on the service call.

Default Sorting

The WF_Queue_Call_No_Activity_List report is ordered by default in the following manner:

#	Column	Method
1	Call No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls w/ No Activity > 48 hrs

The purpose of the Count of Calls w/ No Activity > 48 hrs bucket is to urgently flag service calls across all statuses that have shown no activity for more than 48 hours, indicating a critical need for immediate intervention.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters all call data in the workflow to a specific financial entity.	List		Default List (00)
Branch	User-selectable. Filters all call data in the workflow to a specific branch.	List		All
Department	User-selectable. Filters all call data in the workflow to a specific department.	List		All
User ID	User-selectable. Filters all call data to a specific user. Defaults to the currently logged-in user.	User		Current User

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes calls of all statuses (as 'All Call Statuses' filter is set to 'ALL').
Constant Filter	Filters for calls where the last recorded event was more than 48 hours ago.
Constant Filter	Includes calls of all types by default (as 'Call Type' filter is set to 'ALL').
Constant Filter	No specific dispatch queues are filtered by default.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0106).
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'callstatus' parameter of the target form is set using the current value of the workflow filter 'All Call Statuses'.
    - The 'pn_minhours' parameter of the target form is set using the current value of the workflow filter 'No Activity 48'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Call Type'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'UserID'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Bucket Data Source (Report No: Q0106)

The data for this bucket is sourced from Report No: **WF_Queue_Call_No_Activity_List** (Q0106). This report identifies service calls that have been open or have not had any recorded activity for a specified minimum duration (and optionally within a maximum duration). It is designed to highlight calls that might require attention due to prolonged open times or inactivity.
The report considers various filter parameters such as Company, Call Status (e.g., 'OPEN'), Call Type, User ID, List, List, and Dispatch Queue. A key feature is its ability to filter calls based on the duration since their last event (Last Event Date), using minimum and maximum hour thresholds. By default, it focuses on active calls, but can include others if specified. This helps in managing service level agreements and ensuring timely responses to customer issues.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Service Call record.
Date	The date the service call was created or logged.
Priority	The priority level of the service call.
Call No	The user-facing number for the service call.
Company	The name of the customer associated with the service call, from Customer information.
Site Name	The name of the customer's site where the service call is located, from Site information.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller.
Product	The description of the product or equipment related to the service call, from Product information.
Status Code	The status of the service call.
Dispatch Queue	The dispatch queue the service call is assigned to.
Problem Code	A code representing the type of problem reported.
Problem	A description of the problem or issue reported for the service call.
CSR	The Customer Service Representative assigned to manage the service call.
Tech Assigned	The technician assigned to the service call.
Call Type	The sale type of the call.
Dispatch No	The unique internal identifier for the service call.
Last Event Date	The date and time of the last recorded event or activity on the service call.

Default Sorting

The WF_Queue_Call_No_Activity_List report is ordered by default in the following manner:

#	Column	Method
1	Call No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Purchasing

Path: Workflow > NO CATEGORY > Purchasing
Workflow No: 360Q723344

Purpose

The purpose of the Purchasing workflow is to provide a comprehensive overview and management tools for the procurement lifecycle, from identifying items needing purchase or re-ordering, through purchase order (PO) confirmation and receipt, to managing vendor service contract renewals and RMAs. It also offers insights into inventory levels and potential supply chain issues.

Benefits

- **Streamlined Procurement:** Centralizes all purchasing-related tasks and information, improving efficiency from requisition to receipt.
- **Enhanced Inventory Control:** Proactively identifies items needing re-ordering, helping to maintain optimal stock levels and prevent shortages.
- **Improved PO Management:** Tracks POs through their lifecycle, from creation and confirmation to monitoring ETAs and receiving goods.
- **Risk Mitigation:** Alerts users to potential supply chain disruptions such as items with no ETA, overdue ETAs, or ETAs past their requested dates.
- **Data Accuracy:** Highlights unverified items on quotes and orders, prompting review and correction to ensure accurate master data for purchasing.
- **Efficient RMA Processing:** Provides a dedicated queue for RMAs awaiting testing, facilitating timely resolution of returns.
- **Inventory Visibility:** Offers quick access to current on-hand inventory levels and detailed reports on purchases by master item.
- **Vendor Contract Management:** Helps monitor and manage vendor service contract renewals, ensuring continuity of essential services.
- **Comprehensive Oversight:** Enables tracking of project-related POs, ensuring all necessary materials and services for projects are procured.
- **Informed Decision-Making:** Provides access to key reports like manufacturer sales forecasts and product information for better purchasing strategies.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow Filters

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters the data across various buckets to a specific department or all departments.	List		ALL
Project Type	User-selectable. Filters data based on the type of project, allowing focus on procurement activities related to specific project categories.	General Code: UNIFIDTYP		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Items to Purchase

The purpose of the Count of Items to Purchase bucket is to display a count of order line items that are pending procurement. This typically includes items from approved sales orders or other demand signals that require purchasing action. Clicking this bucket opens the "Items to Purchase Queue" for detailed review and processing.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered for items with a PO Release Date of today.
Constant Filter	The data is filtered where Contract Type, Contract No, List, and Purchase For parameters are not specified (blank).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Items to Purchase Queue
- **Parameters Passed (if any):**
  - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.
  - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.

Bucket Data Source (Report No: Q0094)

The data for this bucket is sourced from Report No: **WF_Get_OrderToPurchase_Items** (Q0094). This report returns a list of contract items (order items) that are identified as needing to be purchased. It typically considers items from approved orders that have not yet been placed on a purchase order and are due for procurement based on their PO release date. The report helps purchasing agents identify immediate purchasing needs.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the associated Order.
Altpartno	Alternate part number for the item, if available.
Avgcost	Average cost of the item.
Branch	The branch associated with the order item.
Branchqtyavailable	Quantity of the item available in the branch.
Callno	Service Call number if the order item is related to a service call.
Cellnote	Notes associated with the item at the order level.
Company	Name of the company (entity) associated with the order.
Companyno	Identifier of the company (entity) associated with the order.
Conitemno	Unique identifier for the order item.
Cost	Cost of the order item.
Csr	Customer Service Representative associated with the related service call, if applicable.
Customerno	Identifier for the customer associated with the order.
Dept	List associated with the order.
Description	Description of the item.
Dispatchno	Dispatch number if the order item is related to a service call.
Dropshipflag	Indicates if the item is to be drop-shipped ('Y' for yes, 'N' for no).
Googlesearch	A pre-formatted URL to search for the item on Google.
Itemtype	The type of the item (e.g., 'A' for Asset, 'Q' for Quantity-based).
Lastcost	Last recorded cost for the item.
Line_no	Line number of the item on the order.
Manufacturer	Manufacturer of the item.
Masterno	Master item number. This is blank if the item is an unverified sale item.
Masterqtyalc	Total allocated quantity for this master item across all orders.
Masterqtyonhand	Total on-hand quantity for this master item across all branches.
Masterqtyonorder	Total quantity of this master item currently on purchase orders.
Mastertype	Type of the master item (e.g., 'A', 'Q').
Ordcost	Original cost of the item as on the order.
Pm	Project Manager if the order item is related to a project.
Poitemno	Purchase Order Item number if this order item has already been linked to a PO.
Poreleasedate	The date the item is scheduled to be released for purchasing.
Projectno	Project number if the order item is related to a project.
Qty	Quantity of the item required on the order.
Qtyonhand	On-hand quantity of the item in the specified allocation branch.
Resq_row_color	Internal use for row coloring, often indicating item status (e.g., unverified, drop-ship).
Rqstdate	Requested delivery date for the item.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Saletype	Sale type of the parent order (e.g., 'PROJECT', 'SERVICE').
Systemmasterflag	Flag indicating if the item is a system master.
Systemno	Identifier for a system or kit, if the item is part of one.
Targetpurchaseno	Intended Purchase Order number, if specified.
Vendor	Name of the preferred or assigned vendor for the item.
Vendorno	Identifier of the preferred or assigned vendor for the item.
Vendorpartno	Vendor's part number for the item.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Items to Re-order

The purpose of the Count of Items to Re-order bucket is to show the number of inventory items that have fallen below their re-order point or minimum stock levels and thus require purchasing to replenish stock. Clicking this bucket opens the "Inventory Re-order Queue".

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Report type is set to 'REORDER', focusing on items that have hit their re-order point.
Constant Filter	Excludes items with zero quantity from being considered for re-order (pIncludeZero = 'N').
Constant Filter	Ignores quantities already on order when determining re-order needs (pIgnoreOnOrder = 'Y').
Constant Filter	Uses available quantity for re-order calculation (pUseAvail = 'Y').
Constant Filter	Ignores items with zero allocated quantity when determining re-order needs (pIgnoreZeroAlloc = 'Y').

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Inventory Re-order Queue
- **Parameters Passed (if any):**
    - The 'ignorezeroalloc' parameter of the target action is set using the current value of the workflow filter 'Y'.
    - The 'useavail' parameter of the target action is set using the current value of the workflow filter 'Y'.
    - The 'type' parameter of the target action is set using the current value of the workflow filter 'MINIMUM'.
    - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.
    - The 'includezero' parameter of the target action is set using the current value of the workflow filter 'N'.
    - The 'ignoreonorder' parameter of the target action is set using the current value of the workflow filter 'Y'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0090)

The data for this bucket is sourced from Report No: **WF_Get_Inventory_Reorder** (Q0090). This report identifies master items that need to be re-ordered based on predefined re-order points, minimum stock levels, current on-hand quantities, and quantities already on order. It helps ensure that stock levels are maintained to meet demand.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Master item record.
Branch	The branch for which the re-order calculation is performed.
QtyOnHand	Current on-hand quantity of the item in the specified branch.
QtyOnOrder	Current quantity of the item already on open purchase orders for the branch.
Qty Re-Order	The suggested quantity to re-order for this item in the branch.
Qty Min	The minimum stock level defined for this item in the branch.
Qty Max	The maximum stock level defined for this item in the branch.
Description	Description of the master item.
Vendorno	Identifier of the primary vendor for this item.
Manufacturer	Manufacturer of the item.
Vendor	Name of the primary vendor for this item.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs to Confirm

The purpose of the Count of POs to Confirm bucket is to display the number of Purchase Orders that are in a 'DATAENTRY' status and require review and confirmation before being sent to vendors. Clicking this bucket opens the "Purchase Orders to Confirm Queue".

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes Purchase Orders of all subtypes ('ALL' filter value).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Purchase Orders to Confirm Queue
- **Parameters Passed (if any):**
    - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.
    - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.
    - The 'subtype' parameter of the target action is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0123)

The data for this bucket is sourced from Report No: **WF_Queue_PO_Confirm** (Q0123). This report lists Purchase Orders that are currently in a 'DATAENTRY' status. These POs are typically newly created and awaiting final review and confirmation before being officially issued to the vendor.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
Purchaseno	The Purchase Order number.
Company	The name of the vendor to whom the Purchase Order is addressed.
Invoicedate	The date of the Purchase Order.
Salesperson	The salesperson associated with the original demand (e.g., sales order).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs to Receive

The purpose of the Count of POs to Receive bucket is to show the number of confirmed or approved Purchase Orders that have outstanding items awaiting receipt into the warehouse. Clicking this bucket opens the "Purchase Orders to Receive Queue".

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes Purchase Orders of all subtypes ('ALL' filter value).
Constant Filter	Excludes Purchase Orders that are solely for drop-ship items (ps_DropShipOnly = 'N').

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Purchase Orders to Receive Queue
- **Parameters Passed (if any):**
  - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.
  - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.
  - The 'subtype' parameter of the target action is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0095)

The data for this bucket is sourced from Report No: **WF_Get_POReceive_Q** (Q0095). This report lists Purchase Orders that have items pending receipt. It focuses on POs that are in a 'CONFIRMED' or 'APPROVED' status (depending on system configuration for PO approval workflows) and are not exclusively for drop-shipments.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
Date	Date the Purchase Order was created.
Purchase No	The Purchase Order number.
Vendor	Name of the vendor on the Purchase Order.
Exp. Date	Expected delivery date for the items on the Purchase Order. Row may be colored red if this date is past due.
Buyer	The User ID of the buyer who created the Purchase Order.
Branch	List associated with the Purchase Order.
Dept	List associated with the Purchase Order.
Sales Rep.	Salesperson associated with the underlying sales order or project, if applicable.
Order No	Original Sales Order number or 'RMARETURN' if it's an RMA PO.
Call No.	Service Call number if the PO is linked to a service call.
CSR	Customer Service Representative associated with the linked service call, if applicable.
Project No	Project number if the PO is linked to a project.
PM	Project Manager for the linked project, if applicable.
PO Type	The type of Purchase Order (e.g., SALE, RMARETURN).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of No ETA Past 48hrs

The purpose of the Count of No ETA Past 48hrs bucket is to highlight Purchase Order items that were created more than 48 hours ago, are on 'CONFIRMED' or 'APPROVED' POs, and still do not have an Estimated Time of Arrival (ETA) specified. This helps identify potential delays or communication gaps with vendors. Clicking this bucket drills down to the underlying report (Q0126) filtered for these specific conditions.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered for all departments ('ALL' filter value).
Constant Filter	The data is filtered for all project leaders ('ALL' filter value).
Constant Filter	Includes Purchase Order items where ETA is not set, the PO status is 'CONFIRMED' or 'APPROVED', and the PO date is older than 48 hours from now.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status. For this specific bucket, it's filtered to show items on confirmed/approved POs older than 48 hours that are missing an ETA. This helps in proactively managing procurement timelines and vendor follow-ups.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
PO Num	Purchase Order number.
Branch	List associated with the Purchase Order.
Buyer ID	User ID of the buyer who created the Purchase Order.
PO Date	Date the Purchase Order was created.
Vendor	Name of the vendor.
Master No	Master item number for the Purchase Order item.
Description	Description of the Purchase Order item.
PO Rls Date	PO Release Date, indicating when the item was released for purchasing (primarily for project items).
Request Date	Requested delivery date for the item from the original demand (e.g., sales order).
ETA	Estimated Time of Arrival for the item from the vendor.
Project No	Project number if the item is linked to a project.
Call No	Service Call number if the item is linked to a service call.
Status Code	Status of the Purchase Order item (e.g., DATAENTRY).
Note	Notes associated with the Purchase Order.
PM	Project Manager for the linked project, if applicable.
CSR	Customer Service Representative for the linked service call, if applicable.
Sales Person	Salesperson associated with the original demand.
DS	Drop Ship flag ('Y' if the item is to be drop-shipped).
Project Type	Type of the linked project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of ETA Overdue

The purpose of the Count of ETA Overdue bucket is to display the number of Purchase Order items whose Estimated Time of Arrival (ETA) has passed, indicating they are late. This helps in prioritizing follow-ups with vendors for overdue deliveries. Clicking this bucket drills down to the underlying report (Q0126) filtered for these overdue items.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered for all departments ('ALL' filter value).
Constant Filter	The data is filtered for all project leaders ('ALL' filter value).
Constant Filter	Includes Purchase Order items where the Estimated Time of Arrival (ETA) is before the current date.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status. For this specific bucket, it's filtered to show items whose ETA is in the past, meaning they are overdue. This helps identify and manage late deliveries from vendors.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
PO Num	Purchase Order number.
Branch	List associated with the Purchase Order.
Buyer ID	User ID of the buyer who created the Purchase Order.
PO Date	Date the Purchase Order was created.
Vendor	Name of the vendor.
Master No	Master item number for the Purchase Order item.
Description	Description of the Purchase Order item.
PO Rls Date	PO Release Date, indicating when the item was released for purchasing (primarily for project items).
Request Date	Requested delivery date for the item from the original demand (e.g., sales order).
ETA	Estimated Time of Arrival for the item from the vendor.
Project No	Project number if the item is linked to a project.
Call No	Service Call number if the item is linked to a service call.
Status Code	Status of the Purchase Order item (e.g., DATAENTRY).
Note	Notes associated with the Purchase Order.
PM	Project Manager for the linked project, if applicable.
CSR	Customer Service Representative for the linked service call, if applicable.
Sales Person	Salesperson associated with the original demand.
DS	Drop Ship flag ('Y' if the item is to be drop-shipped).
Project Type	Type of the linked project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of ETA Past Req. Date

The purpose of the Count of ETA Past Req. Date bucket is to highlight Purchase Order items where the vendor's Estimated Time of Arrival (ETA) is later than the date the item was originally requested (e.g., by a project or sales order). This indicates a potential mismatch between supply and demand timelines. Clicking this bucket drills down to the underlying report (Q0126) filtered for these items.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered for all departments ('ALL' filter value).
Constant Filter	The data is filtered for all project leaders ('ALL' filter value).
Constant Filter	Includes items where the Purchase Order Item ETA is later than the associated Order Item's Delivery Date.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items and their ETA status. For this specific bucket, it's filtered to show items where the vendor's ETA is later than the internal requested date, signaling a potential delay in meeting project or customer timelines.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
PO Num	Purchase Order number.
Branch	List associated with the Purchase Order.
Buyer ID	User ID of the buyer who created the Purchase Order.
PO Date	Date the Purchase Order was created.
Vendor	Name of the vendor.
Master No	Master item number for the Purchase Order item.
Description	Description of the Purchase Order item.
PO Rls Date	PO Release Date, indicating when the item was released for purchasing (primarily for project items).
Request Date	Requested delivery date for the item from the original demand (e.g., sales order).
ETA	Estimated Time of Arrival for the item from the vendor.
Project No	Project number if the item is linked to a project.
Call No	Service Call number if the item is linked to a service call.
Status Code	Status of the Purchase Order item (e.g., DATAENTRY).
Note	Notes associated with the Purchase Order.
PM	Project Manager for the linked project, if applicable.
CSR	Customer Service Representative for the linked service call, if applicable.
Sales Person	Salesperson associated with the original demand.
DS	Drop Ship flag ('Y' if the item is to be drop-shipped).
Project Type	Type of the linked project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Unverified Quote Items

The purpose of the Count of Unverified Quote Items bucket is to display the number of line items on active quotes that do not have an associated master item record in the system. This prompts a review to ensure items are properly defined before quotes are converted to orders and purchased. Clicking this bucket drills down to the underlying report (Q0136).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0136).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0136)

The data for this bucket is sourced from Report No: **WF_Queue_QuoteItem_List_Unverified** (Q0136). This report lists quote line items that are "unverified," meaning they lack a corresponding master item number. These items are typically new or custom parts that need to be set up in the system. The report focuses on quotes that are not in 'DATAENTRY', 'REJECT', 'REJECTED', 'CLOSED', or 'CONVERTED' status, ensuring that only active quotes requiring attention are shown.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Quote.
Quote No	The Quote number containing the unverified item.
Quote Item No	Unique identifier for the unverified quote line item.
Description	Description of the unverified item as entered on the quote.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Unverified Order Items

The purpose of the Count of Unverified Order Items bucket is to display the number of line items on active, approved orders that do not have an associated master item record. This is a critical check to ensure all items being processed for fulfillment are correctly defined in the system. Clicking this bucket drills down to the underlying report (Q0313).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0313).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0313)

The data for this bucket is sourced from Report No: **WF_Queue_ContractItem_List_Unverified** (Q0313). This report lists order line items (contract items) that are "unverified," meaning they lack a corresponding master item number. This typically occurs when items are added to quotes without being mapped to existing masters and those quotes are converted to orders. The report focuses on items in 'DATAENTRY' status on orders that are 'APPROVED', 'PARTSHIP', 'SHIPQ', or 'PICKQ', ensuring that only items requiring purchasing or fulfillment attention are highlighted. It excludes items with types like 'DISCOUNT', 'BLANK', etc.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Order.
Order No	The Order number containing the unverified item.
Order Item No	Unique identifier for the unverified order line item.
Description	Description of the unverified item as entered on the order.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Unreceived PO Items Change-Ordered Out

The purpose of the Count of Unreceived PO Items Change-Ordered Out bucket is to identify and count Purchase Order items that were originally ordered but subsequently removed or reduced via a Change Order (CCO or ICO) before they were received. This helps in managing POs and ensuring vendors are notified of such changes to prevent unwanted shipments or incorrect invoicing. Clicking this bucket drills down to the underlying report (Q0109).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0109).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0109)

The data for this bucket is sourced from Report No: **WF_Queue_COItemsOnPO_List** (Q0109). This report lists Purchase Order items that are linked to original order items that have been subsequently change-ordered out (status 'CCO' or 'ICO'). It focuses on PO items that have not yet been received and are not cancelled, highlighting discrepancies that need reconciliation with vendors.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Purchase Order.
PO No	Purchase Order number.
Vendor	Name of the vendor on the Purchase Order.
PO Line	Line number of the item on the Purchase Order.
Master No.	Master item number.
Manufacturer	Manufacturer of the item.
Qty Ordered	Original quantity ordered on the Purchase Order.
PO Status	Status of the Purchase Order item (e.g., DATAENTRY).
ETA	Estimated Time of Arrival for the PO item.
Waybill	Shipping waybill number, if available.
Buyer ID	User ID of the buyer who created the Purchase Order.
Branch	List associated with the Purchase Order.
Orig Order	Original Sales Order number from which the item was change-ordered.
Order Line	Line number of the item on the original Sales Order.
CCO Ord	Change Order number that removed/reduced the item.
CCO Line	Line number of the item on the Change Order.
Co Type	Status of the original order item, indicating if it was an ICO or CCO (e.g., 'CCO', 'ICO').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Missed Project PO

The purpose of the Count of Missed Project PO bucket is to highlight project-related order items that require purchasing but have passed their PO Release Date without a Purchase Order being created. This helps ensure timely procurement for projects and prevents potential delays. Clicking this bucket drills down to the underlying report (Q0341).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters the data across various buckets to a specific department or all departments.	List		ALL
Project Type	User-selectable. Filters data based on the type of project, allowing focus on procurement activities related to specific project categories.	General Code: UNIFIDTYP		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered where Project Leader is not specified (blank).
Constant Filter	The data is filtered where additional SQL conditions are not specified (blank).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0341).
- **Parameters Passed (if any):** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0341)

The data for this bucket is sourced from Report No: **WF_Queue_MissedPO_Contract_Items** (Q0341). This report identifies order items associated with projects that should have been placed on a Purchase Order but were not. It specifically looks for items where the PO Release Date is in the past, the item is not yet on a PO, and it's a purchasable item type (Q, A, S, or special order M). This helps catch items that might have been overlooked in the purchasing process for active projects.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Sales Order.
Branch	List associated with the order.
Order No	Sales Order number containing the item.
Customer	Customer name on the Sales Order.
Master No	Master item number.
Courier	Courier information, if specified on the order item.
Description	Description of the order item.
PO Rls Date	PO Release Date for the item; for this report, this date is in the past.
RqstDate	Requested delivery date for the item.
Due Date	Due date for the item, if specified.
Ship Location No	Shipping location code for the item.
Project No	Project number associated with the order.
Call No	Service Call number, if applicable.
Status Code	Status of the order item (e.g., DATAENTRY).
Note	Notes associated with the order item.
PM	Project Manager for the associated project.
CSR	Customer Service Representative, if applicable.
Sales Person	Salesperson on the order.
DS	Drop Ship flag ('Y' if the item is to be drop-shipped).
Project Type	Type of the associated project.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of RMA Test Q

The purpose of the Count of RMA Test Q bucket is to display the number of Returned Material Authorization (RMA) items that have been received and are currently awaiting testing or further processing. Clicking this bucket opens the "RMA Test Queue".

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: RMA Test Queue
- **Parameters Passed (if any):**
  - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.
  - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.

Bucket Data Source (Report No: Q0099)

The data for this bucket is sourced from Report No: **WF_Get_RMATestQ** (Q0099). This report lists items that have been returned via an RMA process and are currently in the 'RMA Test Queue', meaning they have been received by the warehouse but require inspection, testing, and a decision on their disposition (e.g., return to stock, scrap, return to vendor).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Qty	Quantity of the item returned (displayed as a positive number).
Master No.	Master item number of the returned item.
Asset No.	Asset number, if the returned item is a serialized asset.
Description	Description of the returned item.
Scrap	The designated G/L account for scrapping this item type, if applicable.
RMA No.	The RMA order number.
Company	Name of the customer who returned the item.
Vendor RMA	Vendor RMA number, if the item is intended to be returned to the vendor.
Vendor Credit	Vendor Credit Memo number, if a credit has been issued by the vendor for this return.
Sales Rep	Salesperson associated with the original sale or customer.
Sale Type	Sale type of the original transaction or RMA order.
Branch	List that processed the RMA receipt.
Department	List associated with the RMA.
Call No.	Service Call number, if the RMA originated from a service call.
CSR	Customer Service Representative associated with the service call, if applicable.
Project No.	Project number, if the RMA originated from a project.
PM	Project Manager for the associated project, if applicable.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Vendor Service Contract Renewal Q

The purpose of the Count of Vendor Service Contract Renewal Q bucket is to display the number of vendor service contract items that are due for renewal within a specified timeframe (defaulting to the next 60 days). This helps in proactively managing renewals for services purchased from vendors (e.g., third-party software licenses, support contracts). Clicking this bucket opens the "Vendor Service Contract Renewals Queue".

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL
Department	User-selectable. Filters the data across various buckets to a specific department or all departments.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'Days' parameter (controlling the renewal window) defaults to 60 days if not set by the user.
Constant Filter	The 'Type' parameter (Service Contract Status) defaults to 'ALL' if not set by the user.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Vendor Service Contract Renewals Queue
- **Parameters Passed (if any):**
    - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.
    - The 'department' parameter of the target action is set using the current value of the workflow filter 'DEPARTMENT'.
    - The 'salesrep' parameter of the target action is set using the current value of the workflow filter 'ALL'.
    - The 'branch' parameter of the target action is set using the current value of the workflow filter 'ALL'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0350)

The data for this bucket is sourced from Report No: **Vendor Service Contract Renewal Q** (Q0350). This report lists service contract items that are provided by external vendors and are approaching their renewal date (Vendor End Date). It considers items on active service contracts where the vendor renewal status is 'ACTIVE'. The report helps ensure that necessary vendor services are renewed in a timely manner to avoid disruption.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Service Contract.
Contract No	The Service Contract number that includes the vendor service item.
Customer No	Customer number associated with the Service Contract.
Company	Name of the customer.
Branch	List associated with the Service Contract item.
Contract Item No	Unique identifier for the line item on the Service Contract.
Description	Description of the service item on the Service Contract.
Price	Price of the service item to the customer on the Service Contract.
ProdStartDate	Start date of the service coverage period for the customer.
ProdEndDate	End date of the service coverage period for the customer.
SCStartDate	Start date of the overall Service Contract.
SCEndDate	End date of the overall Service Contract.
Vendor No	Identifier for the vendor providing the service.
Vendor	Name of the vendor providing the service.
Vendor Start Date	Start date of the service period covered by the vendor.
Vendor End Date	End date of the service period covered by the vendor (this date triggers the renewal alert).
Vendor Cost	Cost of the service from the vendor.
Vendor Ref No	Vendor's reference number for the service (e.g., subscription ID).
Master No	Master item number for the service on the Service Contract.
Qty Reorder	Quantity to reorder (typically reflects the quantity on the service contract item).
Vendor Master No	Vendor's master item number or SKU for the service.
Vendor Frequency	Frequency at which the vendor service is billed or renewed (e.g., ANNUAL, MONTHLY).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Find Product

The purpose of the Find Product bucket is to provide a quick shortcut to the "Find Product" screen within Q360, allowing users to search for master items and view their details, inventory levels, and other relevant information.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Find Product Screen
- **Parameters Passed (if any):**
    - The 'companyno' parameter of the target action is set using the current value of the workflow filter 'COMPANYNO'.
    - The 'branch' parameter of the target action is set using the current value of the workflow filter 'BRANCH'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: On Hand Inventory

The purpose of the On Hand Inventory bucket is to provide direct access to a report detailing the current on-hand inventory valuation. This allows users to quickly view stock levels and their associated costs. Clicking this bucket drills down to the underlying Inventory Master Valuation Report (Q0030).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Report data is displayed as of the current date.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0030).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0030)

The data for this bucket is sourced from Report No: **Inventory Master Valuation Report** (Q0030). This report provides a detailed valuation of on-hand inventory as of a specified date. It lists master items, their quantities on hand, average costs, and total values, often broken down by branch and company. It's a key report for financial accounting and inventory management.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Master item record.
Branch	List where the inventory is located. This column also displays company and grand totals in summation rows.
Item Type	Type of the master item (e.g., 'A' for Asset, 'Q' for Quantity-based).
Qty On Hand	Quantity of the item currently on hand in the specified branch.
Qty Available	Quantity of the item available for allocation (On Hand - Allocated).
Avg Cost	Average cost of the item in the specified branch, calculated as Total Value / Qty On Hand.
TotValue	Total valuation of the on-hand quantity for the item in the specified branch (Qty On Hand * Avg Cost).
Qty Commit	Quantity of the item committed on sales orders but not yet shipped.
Commit Value	Value of the committed quantity.
Description	Description of the master item.
Part No.	Vendor or manufacturer part number for the item.
M/Qty	Total quantity on hand for the master item across all branches (from Master record).
M/Avg Cost	Average cost for the master item across all branches (from Master record).
Standard Cost	Standard cost of the master item.
Qty Picked	Quantity of the item that has been picked for orders but not yet shipped.
Qty Allocated	Total quantity of the item allocated to orders.
Location	Primary stocking location of the item.
As Of Date	The date for which the inventory valuation is reported.
Manufacturer	Manufacturer of the item.
Category	Master group (category) of the item.
Sub Cat	Class (sub-category) of the item.
Price List	Price list associated with the item.
Journal Bal	Journal balance for the inventory G/L account as of the report date.
Total Value	Grand total inventory value across all items shown in the report.
Diff	Difference between the Journal Balance and the calculated Total Value of inventory.

Summation Rows

The Inventory Master Valuation Report features the following colored summation rows:

- **Light Yellow**: Summarizes total on-hand quantity, total value, committed quantity, and committed value for all items within a specific List.
- **Light Blue**: Summarizes total on-hand quantity, total value, committed quantity, and committed value for all items within a specific List (across all its branches).
- **Light Green**: Summarizes grand total on-hand quantity, total value, committed quantity, and committed value for all items across all entities and branches included in the report.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Default Sorting

The Inventory Master Valuation Report is ordered by default in the following manner:

#	Column	Method
1	Grouping Level (List, List, Master)	Ascending
2	Master No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Purchases by Master

The purpose of the Purchases by Master bucket is to provide access to a report that details purchase history, quantities, and amounts, aggregated by master item. This allows for analysis of purchasing trends for specific items. Clicking this bucket drills down to the underlying report (Q0010).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Report data is filtered to show purchases for today.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0010).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0010)

The data for this bucket is sourced from Report No: **Purchases by Master No.** (Q0010). This report provides a summary of purchase activity for each master item within a specified date range, company, and branch. It shows the total quantity purchased, the total invoiced amount for those purchases, and the percentage that each master item's purchase value represents of the total purchases in the report.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Qty	Total quantity of the item received on posted vendor invoices within the report parameters.
Master No.	The master item number. Provides a drilldown to the Master Vendor information.
Manufacturer	Manufacturer of the item.
Description	Description of the master item.
Total	Total invoiced amount for this item from posted vendor invoices within the report parameters.
Percentage	The percentage this item's total invoiced amount represents out of the grand total for the report.

Summation Rows

The Purchases by Master No. report features the following colored summation rows:

- **Light Green**: Displays the grand total of the 'Total' column, representing the sum of all purchase invoiced amounts for all master items included in the report.

Default Sorting

The Purchases by Master No. report is ordered by default in the following manner:

#	Column	Method
1	Total	Descending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Manufacturer Sales Forecast

The purpose of the Manufacturer Sales Forecast bucket is to provide access to a report that forecasts sales based on manufacturer. This helps in understanding potential demand for products from specific manufacturers, aiding in procurement and inventory planning. Clicking this bucket drills down to the underlying report (Q0034).

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
COMPANYNO	User-selectable. Filters the data across various buckets to a specific company/entity.	List		Current User's Company
BRANCH	User-selectable. Filters the data across various buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Report data is displayed as of the current date.
Constant Filter	Probability parameter is not explicitly set by the workflow.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0034).
- **Parameters Passed (if any):** None.

Bucket Data Source (Report No: Q0034)

The data for this bucket is sourced from Report No: **Manufacturer Sales Forecast** (Q0034). This report projects future sales demand for items, grouped by manufacturer. It typically considers active sales opportunities and their associated quotes, filtering by probability and close dates to forecast sales over different time periods (e.g., 0-30 days, 31-60 days, etc.). The report defaults to a detailed format.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a drilldown link to the Sales Opportunity.
Manufacturer	Name of the manufacturer.
Qty	Total forecasted quantity of the item.
Masterno	Master item number.
Description	Description of the master item.
Close_date	Expected close date of the sales opportunity.
Probability	Probability (percentage) of winning the sales opportunity.
_0 to 30 Days	Forecasted sales value (cost) for items expected to close within 0 to 30 days from the 'As Of Date'.
_31 to 60 Days	Forecasted sales value (cost) for items expected to close within 31 to 60 days from the 'As Of Date'.
_61 to 90 Days	Forecasted sales value (cost) for items expected to close within 61 to 90 days from the 'As Of Date'.
_>90 Days	Forecasted sales value (cost) for items expected to close beyond 90 days from the 'As Of Date'.
Interest	Interest level or type associated with the sales opportunity.
Opportunity No	Sales Opportunity number.
Quote No	Quote number associated with the opportunity.
Status Code	Status of the quote (e.g., AUTHORIZED, APPROVEQ).
Branch	List associated with the quote.
Sales Rep	Sales representative for the opportunity.
Company	Customer company name on the quote.
Title	Title of the sales opportunity.

Default Sorting

The Manufacturer Sales Forecast report (Detailed format) is ordered by default in the following manner:

#	Column	Method
1	Manufacturer	Ascending
2	Masterno	Ascending
3	Close_date	Ascending
4	Title	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Warehouse

Path: Workflow > Warehouse
Workflow No: 360Q723347

Purpose

The purpose of the Warehouse workflow is to provide a centralized dashboard for managing and monitoring key warehouse operations. It offers visibility into purchase order receiving, item picking and shipping, returns management (RMAs), and inventory status, facilitating efficient warehouse management and timely fulfillment of orders.

Benefits

- Provides a clear overview of items at various stages in the warehouse (e.g., to receive, to pick, to ship).
- Streamlines the receiving process by highlighting Purchase Orders ready for receipt.
- Facilitates efficient order picking by identifying items ready for fulfillment.
- Manages the shipping queue, ensuring picked items are dispatched promptly.
- Tracks and manages customer returns (RMAs) through receive and test stages.
- Monitors Purchase Order ETAs, highlighting those due today/older or past their requested dates.
- Offers quick access to essential warehouse functions like inventory transfers, tech returns, and inventory counts.
- Improves inventory accuracy and visibility with direct links to on-hand inventory reports.
- Enhances control over vendor returns and RMA processing.
- Centralizes warehouse tasks, improving operational efficiency and reducing delays.

Workflow Filters

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL
Ship / PO Release Date	User-selectable. Controls the date used for filtering items based on their ship or purchase order release dates within relevant buckets like 'Items to Pick' or 'Items to Ship'.	Date		Today

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of POs to Receive

The purpose of the Count of POs to Receive bucket is to display the number of Purchase Orders (POs) that are currently awaiting receipt into the warehouse. Clicking this bucket navigates the user to the PO Receiving screen to process these POs.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'subtype' parameter for the underlying report is always set to 'ALL', meaning all subtypes are considered.
Constant Filter	The 'dropshiponly' parameter for the underlying report is always set to 'N', meaning purchase orders exclusively for drop-ship items are excluded.
Inclusion	Includes Purchase Orders with a status of 'CONFIRMED' or 'APPROVED' (depending on the POApprovalQ system configuration).
Exclusion	Excludes Purchase Orders of type 'RECURRING'.
Inclusion	Includes Purchase Order items that are not yet 'CANCELLED', 'RETURNED', or 'RECEIVED', and have an ordered quantity greater than zero.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Purchase Order Receiving Queue
- **Parameters Passed:**
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'subtype' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0095)

The data for this bucket is sourced from Report No: **WF_Get_POReceive_Q** (Q0095). This report retrieves a list of purchase orders that are ready for receiving based on their status and item details.
The report considers Purchase Orders that are in a 'CONFIRMED' or 'APPROVED' state (depending on the 'POApprovalQ' system configuration). It specifically excludes 'RECURRING' type POs. The items on these POs must not be 'CANCELLED', 'RETURNED', or already 'RECEIVED', and must have an ordered quantity greater than zero.
The report can be filtered by Company and List. A constant filter ensures that POs marked exclusively for drop-ship are not included in this count, focusing on items expected at the physical warehouse.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the Purchase Order form.
PO Date	The date the Purchase Order was created.
Purchase Order No	The unique identifier for the Purchase Order.
Vendor	The name of the vendor from whom the items are being purchased.
Expected Delivery Date	The date the vendor is expected to deliver the items. This column is highlighted in red if the delivery date is past.
Buyer	The User ID of the buyer who created the Purchase Order.
Branch	The branch associated with the Purchase Order.
Department	The department associated with the Purchase Order.
Sales Rep	The salesperson associated with the original order if the PO is linked to a sales order.
Order No	The linked sales order number if the PO is for a specific customer order. For RMA returns, this shows the RMA PO Type.
Call No	The linked service call number if the PO is for a service call.
CSR	The Customer Service Representative associated with the linked service call.
Project No	The linked project number if the PO is for a project.
Project Manager	The Project Manager of the linked project.
PO Type	The type of the Purchase Order (e.g., SALE, RMARETURN).

Default Sorting

The WF_Get_POReceive_Q report is ordered by default in the following manner:

#	Column	Method
1	Purchase Order No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Items to Pick

The purpose of the Count of Items to Pick bucket is to display the number of order line items that are ready to be picked from warehouse inventory. Clicking this bucket navigates the user to the Parts Picking Queue screen to manage these picking tasks.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL
Ship / PO Release Date	User-selectable. Controls the date used for filtering items based on their ship or purchase order release dates within relevant buckets like 'Items to Pick' or 'Items to Ship'.	Date		Today

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'department' parameter for the underlying report is always set to 'ALL', considering items from all departments.
Constant Filter	The 'recordtype' parameter for the underlying report is always set to 'ALL', considering all record types for picking.
Constant Filter	The 'includeunrecvpo' parameter is set to 'N', excluding items that are on unreceived purchase orders from the pick queue count.
Constant Filter	The 'partsfilter' parameter is set to 'Blank' (no specific text filter), allowing other flags to control part inclusion.
Constant Filter	The 'includeparts' parameter is set to 'Y', ensuring that inventoried parts (Type A or Q) are included.
Constant Filter	The 'includenonparts' parameter is set to 'Y', ensuring that non-inventoried items (e.g., labor, services) that might be part of an order are also considered if relevant to the picking process context.
Constant Filter	The 'includelinked' parameter is set to 'Y', including items that are linked to Purchase Orders.
Constant Filter	The 'includenonlinked' parameter is set to 'Y', including items that are not linked to Purchase Orders (i.e., to be picked from stock).
Constant Filter	The 'includenopartonly' parameter is set to 'N', meaning orders that only contain non-part items are not excluded by this specific filter.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Type	Description
Constant Filter	The 'includepickonly' parameter is set to 'Y', focusing the count on items that are actually in a pickable state.
Inclusion	Includes orders with statuses 'APPROVED', 'PARTSHIP', 'PICKQ', or 'SHIPQ' where items are in 'DATAENTRY', 'PICKED', or 'BACKORDER' status.
Exclusion	Excludes items that are part of service work orders, recurring orders, or route orders.
Exclusion	Excludes orders in the 'CCRESERVE' (credit card reserve) queue.
Exclusion	Excludes items marked for drop shipment.
Inclusion	For project-related items, only those with a PO Release Date on or before the selected 'Ship / PO Release Date' filter are included (behavior might be affected by 'IGNOREBLANKPORELDATEFORPROJECT' system configuration).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Parts Pick Queue
- **Parameters Passed:**
  - The 'poreleasedate' parameter of the target form is set using the current value of the workflow filter 'Ship / PO Release Date'.
  - The 'includeparts' parameter of the target form is set using the current value of the workflow filter 'Y'.
  - The 'includenonparts' parameter of the target form is set using the current value of the workflow filter 'Y'.
  - The 'includelinked' parameter of the target form is set using the current value of the workflow filter 'Y'.
  - The 'includenonlinked' parameter of the target form is set using the current value of the workflow filter 'Y'.
  - The 'includenopartonly' parameter of the target form is set using the current value of the workflow filter 'N'.
  - The 'includepickonly' parameter of the target form is set using the current value of the workflow filter 'Y'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'recordtype' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'includeunrecvpo' parameter of the target form is set using the current value of the workflow filter 'N'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0121)

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

The data for this bucket is sourced from Report No: **WF_Get_OrdersPick_Q** (Q0121), which utilizes the underlying procedure Get_OrdersPick_Q (Q0092). This report identifies order line items that are ready for picking from the warehouse.

The report focuses on orders that are in an approved or partially shipped state, and specifically items that are not yet picked or are on backorder. It excludes items designated for drop shipment, as well as orders related to service work, recurring schedules, or routes. For project-related items, their inclusion depends on the PO Release Date matching the filter criteria. The report considers various item characteristics like whether they are parts or non-parts, linked to POs or not, and if they are in a pickable state, based on several constant filter parameters passed from the workflow.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate to the Parts Pick form for the specific order.
Order No	The identifier of the customer order.
Ship To Company	The name of the company to which the order will be shipped.
Sale Type	The sale type of the order (e.g., Project, Service).
Delivery Date	The requested or scheduled delivery date for the order.
Delivery Method	The method of delivery for the order.
Assigned Tech	The technician assigned to the order, if applicable.
Sales Rep	The primary salesperson associated with the order.
Status	The status of the order (e.g., APPROVED, PARTSHIP).
Back Order	Indicates if the order contains items that are currently on backorder.
Purchase Order No	The linked Purchase Order number if items on this order are sourced from a PO. Displays 'MULTIPLE' if linked to several POs.
PO Status	The status of the linked Purchase Order. Displays 'MULTIPLE' if linked to several POs with differing statuses.
Start Date	The start date of the order.
Department	The department associated with the order.
Call No	The linked service call number, if applicable.
CSR	The Customer Service Representative associated with the order or linked call.
Project No	The linked project number, if applicable.
Project Manager	The Project Manager for the linked project.

Default Sorting

The WF_Get_OrdersPick_Q report is ordered by default in the following manner:

#	Column	Method
1	Order Start Date	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Items to Ship

The purpose of the Count of Items to Ship bucket is to display the number of order line items that have been picked and are now ready for shipment from the warehouse. Clicking this bucket navigates the user to the Shipping Queue screen to manage and process these shipments.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL
Ship / PO Release Date	User-selectable. Controls the date used for filtering items based on their ship or purchase order release dates within relevant buckets like 'Items to Pick' or 'Items to Ship'.	Date		Today

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'department' parameter for the underlying report is always set to the current user's department.
Constant Filter	The 'recordtype' parameter is set to 'ALL', including all record types for shipping.
Constant Filter	The 'partsfilter' parameter is set to 'ALL', considering both parts and non-parts for shipping if they are in the queue.
Inclusion	Includes orders that are in the 'SHIPQ' (Ship Queue) status.
Inclusion	Considers items that have been picked and are ready for dispatch.
Inclusion	For project-related items, only those with a Ship Release Date on or before the selected 'Ship / PO Release Date' filter are included (behavior might be affected by 'IGNOREBLANKSHIPRELDATEFORPROJECT' system configuration).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Shipping Queue
- **Parameters Passed:**
    - The 'shipreleasedate' parameter of the target form is set using the current value of the workflow filter 'Ship / PO Release Date'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

- The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
- The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
- The 'partsfilter' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0120)

The data for this bucket is sourced from Report No: **WF_Get_OrdersShip_Q** (Q0120), which utilizes the underlying procedure Queue_Order_Ship (which in turn calls Get_Ship_Q). This report identifies orders that are in the shipping queue and ready for dispatch.
The report specifically targets orders that have reached the 'SHIPQ' status, indicating that items have been picked and are awaiting shipment. It can be filtered by Company, List, List (defaults to user's department), a general parts filter (defaults to all), record type (defaults to all), and the Ship Release Date. This ensures that only relevant, ready-to-ship orders are displayed based on the user's context and selected filters.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in display order, based on typical 'Get_Ship_Q' output):

Column Name	Description
Zoom Drilldown	Provides a link to navigate to the Shipping form for the specific order.
Order No	The identifier of the customer order.
Order Type	The type of the order (e.g., SALE, PROJECT).
Sale Type	The sale type associated with the order.
Ship To Company	The name of the company to which the order will be shipped.
Delivery Date	The requested or scheduled delivery date for the order.
Assigned Tech	The technician assigned to the order, if applicable (often for call-related shipments).
Delivery Method	The method of delivery for the order.
Ship Type	Indicates the type of shipment (e.g., full, partial).
Call No	The linked service call number, if the order is related to a service call.
Dispatch No	The dispatch number if associated with a service call.
CSR	The Customer Service Representative, typically for service call related orders.
Project No	The linked project number, if the order is for a project.
Project Manager	The Project Manager for the linked project.
Sales Rep	The primary salesperson for the order.
Department	The department associated with the order.
Order Notes	Any notes associated with the order header.

Default Sorting

The WF_Get_OrdersShip_Q report data (from Get_Ship_Q) is typically ordered by Order Date and then by Order Number.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Internally Shipped Items

The purpose of the Count of Internally Shipped Items bucket is to display the number of items that have been marked as shipped using an internal courier or have a non-blank staging location, indicating they might be staged for internal transfer or specific projects rather than external customer shipment via a commercial courier. Clicking this bucket provides a detailed list of these items.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0319).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0319)

The data for this bucket is sourced from Report No: **Internally Shipped Items** (Q0319). This report lists order items that have a status of 'SHIPPED' and are either marked with a courier that includes the word 'INTERNAL' or have a non-blank staging location.
The report focuses on items of type 'A' (Asset/Serialized) or 'Q' (Quantity-based). It is designed to identify items that have been processed as shipped but might be part of an internal transfer, kitting process, or staged for a specific internal purpose rather than a direct external customer shipment via a commercial carrier. The report can be filtered by Company, Allocation List, Project No, Call No, Order No, and Ship Release Date. The status code is fixed to 'SHIPPED', and courier includes 'INTERNAL' OR staging location is not blank.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Customer	The customer associated with the order.
Site Name	The ship-to site name for the order.
Project No	Project number. Provides a link to navigate to the Project form.
Project Title	The title of the associated project.
Project Manager	The Project Manager (manager) for the associated project.
Call No	Service call number. Provides a link to navigate to the Service Call form.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
CSR	Customer Service Representative for the associated service call.
Tech Assigned	Technician assigned to the associated service call or order.
Branch	The branch associated with the order item.
Order No	Order number. Provides a link to navigate to the Order form.
Sale Type	The sale type of the order.
Qty	The quantity of the item shipped.
Master No	Master number (part number) of the item. Provides a link to navigate to the Master Item form.
Description	Description of the item.
Part No	Vendor part number of the item.
Manufacturer	Manufacturer of the item.
Item Type	The type of the item (e.g., 'A', 'Q').
Location (Group1)	Group1 field, often used for location information.
Room/Floor (Group2)	Group2 field, often used for room or floor details.
System (Group3)	Group3 field, often used for system designation.
Status Code	The status of the order item (fixed to 'SHIPPED' for this report).
Courier	The courier used for shipment (e.g., '%INTERNAL%').
Waybill	The waybill or tracking number for the shipment.
Staging Location	The staging location assigned to the item.
Asset No	Asset number, if the item is serialized. Provides a link to navigate to the Asset form.
Serial No	Serial number of the item, if applicable.
P.O. Release Date	Purchase Order release date for the item.
Ship Date	The date the item was shipped.
Ship Release Date	The scheduled or planned ship release date for the item.
PO Receive Date	The date the item was received on a purchase order, if applicable.
Requested Date	The original requested delivery date for the item.
Order Item No.	The unique identifier for the order item (hidden by default).
Dispatch No.	The dispatch number if linked to a service call (hidden by default).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of RMA to Receive

The purpose of the Count of RMA to Receive bucket is to display the number of Return Material Authorizations (RMAs) that are pending receipt of items from customers. Clicking this bucket navigates the user to the RMA Receiving screen.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: RMA Receiving Queue
- **Parameters Passed:**
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.

Bucket Data Source (Report No: Q0098)

The data for this bucket is sourced from Report No: **WF_Get_RMA_Q** (Q0098). This report retrieves a list of Return Material Authorizations (RMAs) where items are expected to be returned by customers and are awaiting receipt at the warehouse.
The report specifically lists order items that have a status of 'RMA'. It considers orders that are in 'APPROVED', 'SHIPQ', 'PARTSHIP', or 'SHIPPED' status, or orders of type 'WORKORDER'. The data is filtered by the selected Company and List to show RMAs relevant to the user's context.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate to the RMA Return processing form for the specific RMA order.
RMA Order No	The identifier for the RMA order.
Customer	The name of the customer returning the items.
Order Date	The date the original order (or RMA order) was created.
Sales Rep	The salesperson associated with the order.
Site No	The site number from which the items are being returned.
Company No	The company number (entity) associated with the RMA.
Dispatch No	The dispatch number if the RMA is related to a service call.
Call No	The service call number if the RMA originated from a service call.
CSR	The Customer Service Representative associated with the service call.
Project No	The project number if the RMA is related to a project.
Project Manager	The Project Manager for the related project.
Sale Type	The sale type of the original order.
Branch	The branch handling the RMA.
Department	The department associated with the RMA.

Default Sorting

The WF_Get_RMA_Q report is ordered by default in the following manner:

#	Column	Method
1	RMA Order No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of RMA to Test

The purpose of the Count of RMA to Test bucket is to display the number of Return Material Authorizations (RMAs) where items have been received from customers and are now awaiting testing or inspection. Clicking this bucket navigates the user to the RMA Test Queue.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: RMA Test Queue
- **Parameters Passed:**
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.

Bucket Data Source (Report No: Q0099)

The data for this bucket is sourced from Report No: **WF_Get_RMATestQ** (Q0099). This report retrieves a list of RMA items that have been received and are currently in the RMA Test Queue, awaiting inspection and disposition.
The report focuses on items within the 'RMATestQ' that have not yet been marked as 'Tested'. It can be filtered by the Company and List to show relevant RMAs. The report provides details about the returned item, its origin (e.g., original order, project, or call), and any linked vendor RMAs or credit notes if already processed to that stage.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Qty	The quantity of the item received for RMA. (Displayed as a positive value, actual stored quantity for RMA is negative).
Master No	The master number (part number) of the returned item.
Asset No	The asset number if the returned item is serialized.
Description	The description of the returned item.
Scrap Account	The General Ledger account designated for scrapping items, if applicable for this master.
RMA Order No	The RMA order number associated with the return.
Customer	The name of the customer who returned the item.
Vendor RMA No	The Purchase Order number if a return to vendor has been initiated for this item.
Vendor Credit No	The Vendor Invoice (voucher) number if a credit has been received from the vendor.
Sales Rep	The salesperson associated with the original transaction.
Sale Type	The sale type of the original transaction.
Branch	The branch handling the RMA.
Department	The department associated with the RMA.
Call No	The service call number if the RMA originated from a service call.
CSR	The Customer Service Representative associated with the service call.
Project No	The project number if the RMA is related to a project.
Project Manager	The Project Manager for the related project.

Default Sorting

The WF_Get_RMATestQ report is ordered by default in the following manner:

#	Column	Method
1	RMA Order No	Ascending
2	Description	Ascending
3	Qty	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of PO ETA Today and Older

The purpose of the Count of PO ETA Today and Older bucket is to highlight Purchase Order items where the Expected Time of Arrival (ETA) is today or has already passed. This helps in proactively managing and following up on potentially delayed POs.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'department' parameter for the underlying report is always set to 'ALL', considering items from all departments.
Constant Filter	The 'projectleader' parameter for the underlying report is always set to 'ALL', considering items for all Project Managers.
Constant Filter	The 'where' parameter for the underlying report is set to 'pi.ETA < dbo.FNgetQDate(''SYSTEM'', '''')', which means it filters for Purchase Order items where the ETA is before the current system date (i.e., past due).
Inclusion	Includes Purchase Order items with a status of 'DATAENTRY' (meaning not yet received).
Inclusion	Includes Contract Items linked to these PO items with a status of 'DATAENTRY'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items based on their Expected Time of Arrival (ETA) relative to specific conditions.
For this specific bucket, the report is configured to show Purchase Order items that are in a 'DATAENTRY' status (not yet received) and are linked to 'DATAENTRY' status contract items, where the ETA on the PO item is earlier than the current system date. It can be filtered by Company, List, List, and Project Manager, though for this bucket, List and Project Manager are typically set to 'ALL'.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the Purchase Order form.
PO Num	The Purchase Order number.
Branch	The branch associated with the Purchase Order.
Buyer ID	The User ID of the buyer who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor for the Purchase Order.
Master No	The master number (part number) of the item on the Purchase Order.
Description	The description of the item.
PO Rls Date	The Purchase Order Release Date specified on the linked contract item.
Request Date	The delivery date requested on the linked contract item.
ETA	The Expected Time of Arrival for the item on the Purchase Order.
Project No	The project number if the PO item is linked to a project.
Call No	The service call number if the PO item is linked to a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	Notes from the Purchase Order header.
Project Manager	The Project Manager of the linked project.
CSR	The Customer Service Representative for a linked service call.
Salesperson	The salesperson associated with the original order.
DS (Drop Ship)	Indicates if the item is marked for drop shipment ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of PO ETA Past Requested

The purpose of the Count of PO ETA Past Requested bucket is to identify Purchase Order items where the Expected Time of Arrival (ETA) is later than the date the item was requested for a project or order. This helps in managing potential delays and their impact on project timelines.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'department' parameter for the underlying report is always set to 'ALL', considering items from all departments.
Constant Filter	The 'projectleader' parameter for the underlying report is always set to 'ALL', considering items for all Project Managers.
Constant Filter	The 'where' parameter for the underlying report is set to 'ci.DLVDATE<pi.ETA', which means it filters for items where the requested delivery date (DLVDATE) on the contract item is earlier than the Purchase Order item's ETA.
Inclusion	Includes Purchase Order items with a status of 'DATAENTRY' (meaning not yet received).
Inclusion	Includes Contract Items linked to these PO items with a status of 'DATAENTRY'.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0126).
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0126)

The data for this bucket is sourced from Report No: **WF_Queue_POItem_ETA** (Q0126). This report lists Purchase Order items based on their Expected Time of Arrival (ETA) relative to specific conditions.
For this specific bucket, the report is configured to show Purchase Order items that are in a 'DATAENTRY' status (not yet received) and are linked to 'DATAENTRY' status contract items, where the Purchase Order item's ETA is later than the requested delivery date (DLVDATE) on the associated contract item. It can be filtered by Company, List, List, and Project Manager, though for this bucket, List and Project Manager are typically set to 'ALL'.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the Purchase Order form.
PO Num	The Purchase Order number.
Branch	The branch associated with the Purchase Order.
Buyer ID	The User ID of the buyer who created the Purchase Order.
PO Date	The date the Purchase Order was created.
Vendor	The name of the vendor for the Purchase Order.
Master No	The master number (part number) of the item on the Purchase Order.
Description	The description of the item.
PO Rls Date	The Purchase Order Release Date specified on the linked contract item.
Request Date	The delivery date requested on the linked contract item.
ETA	The Expected Time of Arrival for the item on the Purchase Order.
Project No	The project number if the PO item is linked to a project.
Call No	The service call number if the PO item is linked to a service call.
Status Code	The status of the Purchase Order item (e.g., DATAENTRY).
Note	Notes from the Purchase Order header.
Project Manager	The Project Manager of the linked project.
CSR	The Customer Service Representative for a linked service call.
Salesperson	The salesperson associated with the original order.
DS (Drop Ship)	Indicates if the item is marked for drop shipment ('Y' or 'N').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Find Product

The purpose of the Find Product bucket is to offer a quick way to access the Find Product screen, which allows users to search for and view details of inventory master items.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Find Product
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Transfer Inventory

The purpose of the Transfer Inventory bucket is to provide a quick shortcut to the Inventory Transfer screen, allowing users to move inventory items between different branches or locations within the company.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Inventory Transfer
- **Parameters Passed:**
    - The 'fromCompany No' parameter of the target form is set using the current value of the workflow filter 'Company'.
    - The 'frombranch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Inventory Count

The purpose of the Inventory Count bucket is to provide a quick link to the Physical Inventory Count screen, allowing users to start, manage, and finalize physical stock counts in the warehouse.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Physical Inventory Count
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: On Hand Inventory

The purpose of the On Hand Inventory bucket is to provide a direct link to the Inventory Master Valuation Report, offering a detailed view of current on-hand inventory levels and their valuation. This bucket does not display a count itself but acts as a navigational shortcut.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The 'EndDate' parameter for the underlying report is always set to 'Today', providing a current valuation.
Inclusion	Includes all master items (both 'Q' and 'A' types) with their calculated on-hand quantities and average costs as of the specified date.
Exclusion	By default, items with zero on-hand quantity might be excluded unless the report parameters are changed to include them.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0030).
- **Parameters Passed:** None.

Bucket Data Source (Report No: Q0030)

The data for this bucket is sourced from Report No: **Inventory Master Valuation Report** (Q0030). This report provides a comprehensive valuation of inventory items as of a specified date.
The report calculates the on-hand quantity and average cost for each master item within the selected company and branch. For serialized items (Type 'A'), it sums the cost of individual assets. For quantity-based items (Type 'Q'), it uses the calculated average cost. The report also shows committed quantities and their values. It can be configured to include or exclude items with zero on-hand quantity and to show detailed transaction history if needed. The report aims to reconcile inventory values with the General Ledger inventory accounts.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the Master Item form.
Branch	The branch where the inventory is located. Summary rows will show totals per branch.
Master No	The unique identifier for the master item.
Item Type	The type of the master item (e.g., 'Q' for quantity-based, 'A' for asset/serialized).
Qty On Hand	The quantity of the item currently on hand in the specified branch as of the report date.
Qty Available	Calculated as Qty On Hand minus Qty Allocated. This represents the quantity truly available for new orders.
Avg Cost	The average cost of the item in the specified branch. For 'A' type items, this is derived from the sum of asset costs divided by quantity.
Total Value	The total valuation of the on-hand quantity (Qty On Hand * Avg Cost).
Qty Commit	The quantity of this item committed to sales orders that are not yet shipped but for which the PO has been received.
Commit Value	The value of the committed quantity, calculated using the average cost.
Description	The description of the master item.
Part No.	The vendor part number for the master item.
M/Qty (Master Qty On Hand)	The total on-hand quantity for this master across all branches (from Master record).
M/Avg Cost (Master Avg Cost)	The system-wide average cost for this master (from Master record).
Standard Cost	The standard cost defined for the master item.
Qty Picked	The quantity of this item that has been picked for orders but not yet shipped from this branch.
Qty Allocated	The total quantity allocated to orders from this branch (includes picked and not-yet-picked-from-stock demand).
Location	The primary stocking location defined for the item in this branch or on the master.
As Of Date	The date for which the inventory valuation is calculated.
Manufacturer	The manufacturer of the item.
Category	The master group (category) of the item.
Sub Cat	The class (subcategory) of the item.
Price List	The price list associated with the master item.
Journal Bal	The General Ledger balance for the inventory account as of the report date. This is a summary figure for comparison.
Total Value (Summary)	The grand total value of all inventory included in the report. This is a summary figure.
Diff	The difference between the Journal Balance and the calculated Total Value of inventory. This is a summary figure.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Summation Rows

The Inventory Master Valuation Report features the following colored summation rows:

- **Light Yellow**: Summarizes totals for each List, including Total Value and Commit Value.
- **Light Blue**: Summarizes totals for each Company (List), including Total Value and Commit Value.
- **Light Green**: Provides a Grand Total for all selected data, including Total Value, Commit Value, and compares it with the GL Journal Balance for inventory, showing any difference.

Default Sorting

The Inventory Master Valuation Report is ordered by default in the following manner:

#	Column	Method
1	Internal Sequence (Grouping)	Ascending
2	Master No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Tech Returns

The purpose of the Tech Returns bucket is to provide a shortcut to the Technician Returns screen, enabling the process of returning items from a technician's stock back to the main warehouse inventory.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Technician Returns
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Return to Vendor

The purpose of the Return to Vendor bucket is to provide a shortcut to the Return to Vendor screen, which is used to initiate and manage the process of returning items from stock back to a vendor, often for credit or replacement.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Return to Vendor
- **Parameters Passed:**
    - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Vendor RMA Q

The purpose of the Count of Vendor RMA Q bucket is to display the number of items that are currently in the Vendor RMA (Return Material Authorization) Queue. These are items that have been designated for return to a vendor. Clicking this bucket opens the Vendor RMA Queue screen.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. Filters data across various workflow buckets to a specific company.	List		Current User's Company
Branch	User-selectable. Filters data across various workflow buckets to a specific branch or all branches.	List		ALL

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Vendor RMA Queue
- **Parameters Passed:**
  - The 'Company No' parameter of the target form is set using the current value of the workflow filter 'Company'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0100)

The data for this bucket is sourced from Report No: **WF_Get_RMAVendQ** (Q0100). This report retrieves a list of assets that are currently in the 'RMAVEND' status, indicating they are queued for return to the vendor.
The report lists serialized assets (A-type items) that have been marked with a status of 'RMAVEND'. This status signifies that the item has gone through internal RMA processing and is now pending return to the supplier. The data can be filtered by Company and List to show relevant vendor RMAs.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the Asset form for the item.
Asset No	The unique asset number of the item to be returned to the vendor.
Description	The description of the asset.
Master No	The master number (part number) of the asset.
Purchase Date	The original purchase date of the asset.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Default Sorting

The WF_Get_RMAVendQ report is ordered by default in the following manner:

#	Column	Method
1	Asset No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Accounts Receivable

Path: Workflow > Accounts Receivable
Workflow No: 360Q956933

Purpose

The purpose of the Accounts Receivable workflow is to provide a centralized dashboard for managing and monitoring all key accounts receivable processes. It aims to streamline invoicing, track outstanding payments, manage collections, and ensure timely cash flow for the business.

Benefits

- Improved cash flow management through timely tracking of receivables.
- Increased efficiency in invoicing processes for projects, service calls, and standard orders.
- Enhanced visibility into outstanding invoices and aging receivables.
- Streamlined collections process with quick access to AR data and customer information.
- Better financial control by monitoring projects ready for closing.
- Centralized access to key AR functions like cash receipts and invoice printing.
- Proactive management of upcoming project invoicing milestones.
- Efficient processing of service contract billings.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
As of Date	User-selectable. Determines the date for which aging reports and other time-sensitive AR data are calculated, allowing users to view AR status at different points in time.	Date		Today
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Upcoming Projects to Invoice This Month

The purpose of the Count of Upcoming Projects to Invoice This Month bucket is to provide a forward-looking view of project invoicing tasks that are scheduled to become due within the current month. This helps AR and project teams anticipate and prepare for upcoming billing activities.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes tasks with no specific status code (blank).
Constant Filter	Excludes tasks related to projects with non-active statuses (COMPLETED, CANCELLED, CANCELED).
Constant Filter	Filters for project tasks that are invoice-type, scheduled to start after today but before the first day of next month.
Constant Filter	Data is not filtered by a specific User ID through this workflow filter.
Constant Filter	Data is not filtered by a specific task type through this workflow filter.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Non-Active Project Status'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Future Invoice'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'tasktype' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria such as company, status codes (inclusion/exclusion), specific conditions (via a WHERE clause), branch, User ID, task type, Project Manager, department, and project type. It also considers whether to include tasks from closed projects. The report is designed to help users identify and manage specific sets of project tasks, often used in workflows to highlight tasks requiring action, such as invoicing tasks that are due.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed project invoicing task record. The underlying key is the Project Task Number.
Task No	The unique identifier for the project task (Project Task Number).
Project No	The identifier of the project to which this task belongs.
Company No	The identifier of the company (entity) associated with the project.
Company	The name of the customer company for the project.
Project Title	The title or name of the project.
Priority	The priority level assigned to the project task.
Task Title	The title or description of the project task.
Start Date	The scheduled start date of the project task.
End Date	The scheduled end date of the project task.
Type	The type or nature of the project task (e.g., INVOICE, MILESTONE).
Project Manager	The User ID of the Project Manager or manager for the project.
Responsible	The contact person responsible for the project task. This is derived from the Contact linked to the task.
Assignee	The contact person assigned to work on the project task. This is derived from the User ID assigned to the task.
Est	The estimated effort or quantity for the project task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this project task from time bill records.
Status Code	The status of the project task (e.g., OPEN, COMPLETE).
Category	The primary category classification for the project task.
Sub Cat	The secondary sub-category classification for the project task.
Branch	The business branch associated with the project.
Department	The department associated with the project.

Default Sorting

The WF_Queue_Task_List is ordered by default in the following manner:

#	Column	Method
1	Project No	Ascending
2	Start Date	Ascending
3	End Date	Ascending
4	Task No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Projects to Invoice

The purpose of the Count of Projects to Invoice bucket is to show the number of project-related tasks (specifically invoicing tasks) that are due or active and require an invoice to be generated. This helps Accounts Receivable personnel track and process project billings in a timely manner.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes tasks with no specific status code (blank).
Constant Filter	Excludes tasks related to projects with non-active statuses (COMPLETED, CANCELLED, CANCELED).
Constant Filter	Filters for project tasks that are invoice-type, not in 'DATAENTRY' status, and their scheduled date is on or before today.
Constant Filter	Data is not filtered by a specific User ID through this workflow filter.
Constant Filter	Data is not filtered by a specific task type through this workflow filter.
Constant Filter	Excludes project tasks from closed projects.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0140).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Non-Active Project Status'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Invoice task'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'tasktype' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'IncludeProjClosedItems' parameter of the target form is set using the current value of the workflow filter 'N'.

Bucket Data Source (Report No: Q0140)

The data for this bucket is sourced from Report No: **WF_Queue_Task_List** (Q0140). This report provides a list of project tasks based on various filtering criteria such as company, status codes (inclusion/exclusion), specific conditions (via a WHERE clause), branch, User ID, task type, Project Manager, department, and project type. It also considers whether to include tasks from closed projects. The report is designed to help users identify and manage specific sets of project tasks, often used in workflows to highlight tasks requiring action, such as invoicing tasks that are due.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed project task record. The underlying key is the Project Task Number.
Task No	The unique identifier for the project task (Project Task Number).
Project No	The identifier of the project to which this task belongs.
Company No	The identifier of the company (entity) associated with the project.
Company	The name of the customer company for the project.
Project Title	The title or name of the project.
Priority	The priority level assigned to the project task.
Task Title	The title or description of the project task.
Start Date	The scheduled start date of the project task.
End Date	The scheduled end date of the project task.
Type	The type or nature of the project task (e.g., INVOICE, MILESTONE).
Project Manager	The User ID of the Project Manager or manager for the project.
Responsible	The contact person responsible for the project task. This is derived from the Contact linked to the task.
Assignee	The contact person assigned to work on the project task. This is derived from the User ID assigned to the task.
Est	The estimated effort or quantity for the project task.
Est Unit	The unit of measurement for the estimated effort (e.g., Hours).
Time Billed	The total time billed or logged against this project task from time bill records.
Status Code	The status of the project task (e.g., OPEN, COMPLETE).
Category	The primary category classification for the project task.
Sub Cat	The secondary sub-category classification for the project task.
Branch	The business branch associated with the project.
Department	The department associated with the project.

Default Sorting

The WF_Queue_Task_List is ordered by default in the following manner:

#	Column	Method
1	Project No	Ascending
2	Start Date	Ascending
3	End Date	Ascending
4	Task No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Calls to Invoice

The purpose of the Count of Calls to Invoice bucket is to display the number of service calls that have been completed and are now ready for invoicing, enabling prompt billing for services rendered.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Include calls of any type ('ALL').
Constant Filter	Restricted to calls with a status of 'COMPLETE'.
Constant Filter	Excludes calls with no specific status code (blank).
Constant Filter	Data is retrieved without a specific WHERE clause modification from the workflow filter.
Constant Filter	Data is not filtered by a specific department through this workflow filter.
Constant Filter	Includes calls from all dispatch queues ('ALL').
Constant Filter	Includes calls associated with any user ('ALL').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0105).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Complete'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'dispatchq' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'userid' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0105)

The data for this bucket is sourced from Report No: **WF_Queue_Call_List** (Q0105). This report returns a list of service calls based on specified criteria such as company, type, status codes, branch, department, dispatch queue, and user. It is designed to provide a filtered view of service calls, often used in workflows to highlight calls requiring attention or specific actions, such as those ready for invoicing.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed service call record. The underlying key is the Dispatch Number.
Dispatch No	The unique internal identifier for the service call.
Callno	The customer-facing number for the service call.
Date	The date the service call was created or logged.
Priority	The priority level assigned to the service call (e.g., 1-5).
Company	The name of the customer company associated with the service call.
Sitename	The name of the customer site where the service call is located.
Caller	The name of the person who reported the issue or requested the service.
Phone	The phone number of the caller or contact person for the service call.
Product	The name or description of the product or equipment related to the service call.
Statuscode	The status of the service call (e.g., OPEN, COMPLETE).
Dispatchq	The dispatch queue to which the service call is assigned.
Problemcode	A code representing the type of problem reported for the service call.
Problem	A description of the problem or issue reported for the service call.
Csr	The Customer Service Representative assigned to manage the service call.
Techassigned	The technician assigned to perform the work for the service call.
Calltype	The type of service call (e.g., warranty, T&M, preventative maintenance).
Branch	The business branch associated with the service call.
Department	The department responsible for or associated with the service call.
NextScheduledDate	The next scheduled date for a technician visit or action related to this service call. This is derived by finding the minimum future start date from dispatch schedules for the call that are not yet posted.

Default Sorting

The WF_Queue_Call_List is ordered by default in the following manner:

#	Column	Method
1	Priority	Ascending
2	Date	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Shipped Orders to Invoice

The purpose of the Count of Shipped Orders to Invoice bucket is to highlight customer orders for which items have been shipped and are now pending invoicing. This helps ensure timely billing for delivered goods and services.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
As of Date	User-selectable. Determines the date for which aging reports and other time-sensitive AR data are calculated, allowing users to view AR status at different points in time.	Date		Today
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Restricted to items with a status of 'SHIPPED'.
Constant Filter	Includes orders of all types ('ALL').
Constant Filter	Excludes project orders where deferred revenue is turned on.
Constant Filter	Excludes orders related to service calls.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Orders Invoice Queue (ordersinvoiceq).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0093)

The data for this bucket is sourced from Report No: **WF_Get_OrdersToInvoice_Q** (Q0093). This report retrieves a list of orders that are ready to be invoiced. It typically filters orders based on criteria such as branch, status (e.g., shipped), order type, company, and invoice release date. The report is designed to identify orders that have fulfilled shipping requirements and are awaiting the generation of a customer invoice. It may also include options to exclude certain types of orders, such as project-related deferred revenue orders or orders linked to service calls, to focus on standard sales order invoicing.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed Order record. The underlying key is the Order Number.
Order No	The unique identifier for the customer Order.
Company	The name of the customer associated with the Order.
Order Date	The date the Order was created.
Order Type	The type of the Order (e.g., SALE, CCO, WORKORDER).
Sale Type	The specific sale type classification for the Order, often used for GL posting rules.
Statuscode	The status of the Order (e.g., SHIPPED, APPROVED).
Tsamt	The total sales amount of the Order.
Department	The department associated with the Order.
Branch	The business branch responsible for the Order.
Salesperson	The salesperson credited for the Order. This is derived from Salesperson, Salesperson2, or Salesperson3 fields on the order, taking the first non-empty value.
Projectno	The project number if the Order is linked to a project.
PM	The Project Manager assigned to the project, if the Order is linked to a project.
Callno	The service call number if the Order is related to a service call.
Dispatchno	The dispatch number if the Order is related to a service call.
CSR	The Customer Service Representative, if the Order is related to a service call.
Invoice Date	The anticipated or actual invoice date for the order. For project-linked orders, this is the minimum scheduled date of open invoice-type project tasks.
Inv. Rel. Date	The invoice release date specified for the order items, indicating when they are eligible for invoicing.

Default Sorting

The WF_Get_OrdersToInvoice_Q is ordered by default in the following manner:

#	Column	Method
1	Order No	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Bill Service Contracts

The purpose of the Bill Service Contracts bucket is to initiate the process for billing multiple service contracts simultaneously. This action allows users to generate invoices for due service contract periods efficiently.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Function: Bill Service Contracts.
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Invoices to Print

The purpose of the Count of Invoices to Print bucket is to display the number of invoices that have been generated and are awaiting printing or sending to the customer. This helps ensure that all created invoices are processed and dispatched efficiently.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL
As of Date	User-selectable. Determines the date for which aging reports and other time-sensitive AR data are calculated, allowing users to view AR status at different points in time.	Date		Today

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes invoices of all types ('ALL').
Constant Filter	Includes invoices from all departments ('ALL').
Constant Filter	Includes invoices with any delivery method ('ALL').
Constant Filter	Data is not restricted to auto-delivery only invoices (blank value for AutoOnly).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Invoice Print Queue.
- **Parameters Passed:**
  - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'date' parameter of the target form is set using the current value of the workflow filter 'As of Date'.
  - The 'delivery' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'type' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'custlang' parameter of the target form is set using the current value of the workflow filter 'Blank'.
  - The 'department' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0091)

The data for this bucket is sourced from Report No: **WF_Get_InvoicesToPrint_Q** (Q0091). This report lists invoices that are ready for printing or emailing to customers. It filters invoices based on branch, invoice type, end date, company, department, delivery method, and whether to show only automatically generated invoices. The report helps manage the invoice dispatch process by providing a consolidated view of unposted or posted invoices that have not yet been sent.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed Invoice record. The underlying key is the Invoice Number.
Invoiceno	The unique identifier for the invoice.
Company	The name of the customer company being invoiced.
Order No	The Order number to which this invoice is related. This column includes a zoom capability to the Order or Service Contract form depending on the invoice type.
Salesperson	The salesperson associated with the invoice.
Invoice Type	The type of invoice (e.g., ORDER, PROJECT, SERVICE, CREDIT, MASTER).
Payment Terms	The payment terms applicable to this invoice.
Invamount	The total amount of the invoice. For Master Invoices, this reflects the MasterInvAmount.
Invoice Date	The date the invoice was issued.
Customerno	The unique identifier for the customer.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Language	The language preference for the customer related to this invoice, derived from the Customer record.
Callno	The service call number if the invoice is related to a service call. This is derived from the linked dispatch record or the contract's dispatch record if applicable.
Dispatchno	The dispatch number if the invoice is related to a service call. This is derived from the linked dispatch record or the contract's dispatch record if applicable.
CSR	The Customer Service Representative associated with the service call, if applicable.
Projectno	The project number if the invoice is related to a project.
PM	The Project Manager for the project, if the invoice is project-related.
Posted	Indicates if the invoice has been posted ('P') or not.
Companyno	The identifier for the internal company (entity) issuing the invoice.
Master Invoice No	If this is a sub-invoice, this field shows the number of the master invoice it belongs to.
Branch	The business branch associated with the invoice.
Contact	The primary contact person for this invoice, determined by auto-delivery rules or the invoice's bill-to contact. This column includes a zoom to the Auto Delivery rule if applicable.
Email Address	The email address for the invoice contact, determined from auto-delivery rules or the primary bill-to contact's email.
Reportno	The report definition number (template ID) to be used for printing this invoice, determined by auto-delivery rules or default templates based on invoice type.
Subtotal	The subtotal amount of the invoice before taxes. For Master Invoices, this reflects the MasterSubtotal.
Tax Amount	The total tax amount on the invoice. For Master Invoices, this reflects the MasterTaxAmount.
Billing Method	The billing method associated with the source of the invoice (Project, Call, or Service Contract).

Default Sorting

The WF_Get_InvoicesToPrint_Q is ordered by default in the following manner:

#	Column	Method
1	Invoiceno	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Aged AR

The purpose of the Count of Aged AR bucket is to provide a summary of outstanding customer invoices grouped by aging periods. This allows for quick identification of overdue payments and helps prioritize collection efforts.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Data is retrieved without a specific end date filter applied at the workflow level (End Date parameter is blank). Aging is typically calculated as of the current date or a user-selected 'As of Date' within the report itself.
Constant Filter	Includes invoices from all departments ('ALL').
Constant Filter	Includes invoices of all customer subtypes ('ALL').
Constant Filter	Data is retrieved without a specific currency filter applied at the workflow level (Currency parameter is blank).
Constant Filter	Includes invoices for all customers (CustomerNo parameter is blank).
Constant Filter	Data is retrieved without a specific aging method (AgeBy parameter is blank at workflow level, defaults to 'Invoice Date' in underlying proc if not specified).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Aged AR Quick View.
- **Parameters Passed:**
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'acttype' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'statuscode' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'currency' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'subtype' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'agedby' parameter of the target form is set using the current value of the workflow filter 'Invoice Date'.
    - The 'asofdate' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'type' parameter of the target form is set using the current value of the workflow filter 'Blank'.
    - The 'status' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'customerno' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Bucket Data Source (Report No: Q0103)

The data for this bucket is sourced from Report No: **WF_Print_AgedAR** (Q0103). This report provides a detailed aging of accounts receivable. It lists outstanding invoices, categorizing them into aging buckets (e.g., Current, 31-60 days, 61-90 days, 91+ days) based on either invoice date or due date. The report can be filtered by company, end date for aging, branch, department, customer subtype, currency, and specific customer. It includes customer contact information, invoice details, payment terms, and amounts due in each aging period. This report is essential for credit management and collections, helping to identify overdue invoices and manage customer payment performance.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed Invoice record. The underlying key is the Invoice Number.
Invoice Date	The date the invoice was issued.
Invoiceno	The unique identifier for the invoice.
Company	The name of the customer company.
Order No	The Order number associated with the invoice.
Dayswait	The number of days the invoice has been outstanding, calculated based on the 'AgeBy' parameter (Invoice Date or Due Date) relative to the 'End Date' parameter.
Balance	The outstanding balance amount for the invoice. For Master Invoices, this is the sum of balances of its child invoices.
Projectno	The project number if the invoice is related to a project.
Projecttitle	The title of the project if the invoice is related to a project.
Duedate	The date the invoice payment is due, determined by payment terms or explicitly set.
Customerno	The unique identifier for the customer.
Invtotal	The total amount of the invoice. For Master Invoices, this is the sum of subtotals and tax amounts of its child invoices.
Invamount	The current outstanding balance of the invoice, same as 'Balance' column.
Paidamount	The amount that has been paid towards this invoice. For Master Invoices, this is the sum of paid amounts of its child invoices.
Paiddate	The date of the last payment received for this invoice.
Paymentterms	The payment terms agreed upon for this invoice.
Daysdue	The number of days the invoice is past its due date, calculated based on the 'AgeBy' parameter.
Branch	The business branch associated with the invoice.
Salesperson	The salesperson credited for the sale related to this invoice.
Address1	The first line of the customer's billing address.
Address2	The second line of the customer's billing address.
City	The city of the customer's billing address.
Billcontact	The name of the billing contact person at the customer's company.
Country	The country of the customer's billing address.
Custpayterms	The standard payment terms defined for the customer.
Custsalesperson	The primary salesperson assigned to the customer account.
State	The state or province of the customer's billing address.
Contype	The type of the original Order (e.g., SALE, CCO).
Invdate	The date the invoice was issued (same as Invoice Date).
Postdate	The date the invoice was posted to the general ledger.
Companyno	The identifier for the internal company (entity) that issued the invoice.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Currencytype	The currency code for the invoice amount (e.g., USD, CAD).
Tax1amount	The amount of the first tax component applied to the invoice.
Tax2amount	The amount of the second tax component applied to the invoice, if applicable.
Tax3amount	The amount of the third tax component applied to the invoice, if applicable.
Taxamount	The total tax amount on the invoice.
Paidbalance	The total amount paid towards the invoice. This represents the sum of payments recorded in ARJournal for this invoice before the specified end date.
Pono	The customer's Purchase Order number referenced on the invoice.
Poname	A descriptive name or title associated with the customer's Purchase Order.
Phone	The phone number of the customer.
Department	The department associated with the invoice.
Subtype	The subtype classification of the customer.
Masterinvoiceno	If this invoice is part of a master invoice consolidation, this field shows the master invoice number.
Invoicetype	The specific type of the invoice document (e.g., ORDER, PROJECT, SERVICE).
Dispatchno	The dispatch number if the invoice is related to a service call.
Callno	The service call number if the invoice is related to a service call.
Actionflag	A flag indicating if a collection activity has been logged for this invoice. (Displayed as LTRED if an activity exists).
Curr	The total outstanding balance for invoices aged 0-30 days, based on the report's currency context.
N31to60	The total outstanding balance for invoices aged 31-60 days.
N61to90	The total outstanding balance for invoices aged 61-90 days.
N91plus	The total outstanding balance for invoices aged 91 days or more.
Ntotal	The total outstanding balance across all aging periods.

Summation Rows

The WF_Print_AgedAR features the following colored summation rows:

Report Footer Totals (Not colored, but represent overall summary):

- Summarizes the total outstanding balance for invoices falling into the 'Current' (0-30 days) aging bucket across all customers, displayed with its currency symbol (or '*' if multiple currencies).
- Summarizes the total outstanding balance for invoices falling into the '31-60 days' aging bucket, displayed with its currency symbol (or '*' if multiple currencies).
- Summarizes the total outstanding balance for invoices falling into the '61-90 days' aging bucket, displayed with its currency symbol (or '*' if multiple currencies).
- Summarizes the total outstanding balance for invoices falling into the '91+ days' aging bucket, displayed with its currency symbol (or '*' if multiple currencies).
- Summarizes the grand total outstanding balance across all aging periods and customers, displayed with its currency symbol (or '*' if multiple currencies).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Default Sorting

The WF_Print_AgedAR is ordered by default in the following manner:

#	Column	Method
1	CurrencyType	Ascending
2	CustomerNo	Ascending
3	Company	Ascending
4	DaysWait	Descending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Cash Receipts

The purpose of the Cash Receipts bucket is to provide direct access to the Q360 Cash Receipts entry screen, allowing users to efficiently record payments received from customers against outstanding invoices or as unapplied credits.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Cash Receipts Entry Screen.
- **Parameters Passed:** None.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Projects to Close

The purpose of the Count of Projects to Close bucket is to identify projects that are in an 'ACCOUNTING' status, indicating they have completed operational phases and are ready for final financial review and closure by the accounting department.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. Filters AR information by a specific legal entity, enabling users to view receivables pertinent to that entity.	List		Current User's Company
Branch	User-selectable. Filters the displayed AR data based on a specific business branch, allowing users to focus on receivables for a particular branch.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes only projects with a status of 'ACTIVE' (based on CodeValue2 of PROJSTATUS general code).
Constant Filter	Excludes projects of all other statuses not covered by the include filter. This typically implies it's showing Active projects and the specific status filter further refines this.
Constant Filter	No specific additional WHERE clause is applied from this workflow filter ('ALL').
Constant Filter	Includes projects from all departments ('ALL').
Constant Filter	Includes projects for all customers ('ALL').
Constant Filter	Includes projects of all types ('ALL').
Constant Filter	Restricted to projects with a status code of 'ACCOUNTING'.
Constant Filter	Includes projects managed by any Project Manager ('ALL').
Constant Filter	Includes projects associated with any salesperson ('ALL').

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0129).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company No'.
    - The 'includestatuscode' parameter of the target form is set using the current value of the workflow filter 'Active'.
    - The 'excludestatuscode' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'where' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'customerno' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'Type' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'Statuscode' parameter of the target form is set using the current value of the workflow filter 'Accounting'.
    - The 'ProjectLeader' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'SalesRep' parameter of the target form is set using the current value of the workflow filter 'ALL'.

Bucket Data Source (Report No: Q0129)

The data for this bucket is sourced from Report No: **WF_Queue_Project_List** (Q0129). This report lists projects based on various criteria such as company, specific status codes to include or exclude, custom WHERE conditions, branch, department, customer, project type, Project Manager, and salesperson. It is used to generate targeted lists of projects for workflow monitoring and management, such as identifying projects at a particular stage (e.g., 'ACCOUNTING' status for closure) or those meeting specific financial or operational conditions.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Provides a link to navigate directly to the detailed project record. The underlying key is the Project Number.
ProjectNo	The unique identifier for the project.
CompanyNo	The identifier of the company (entity) associated with the project.
Company	The name of the customer company for the project.
Title	The title or name of the project.
Type	The type or category of the project.
Start Date	The scheduled start date of the project.
End Date	The scheduled end date of the project.
Project Manager	The User ID of the Project Manager or manager assigned to the project.
Status Code	The status of the project (e.g., ACTIVE, ACCOUNTING, COMPLETED).
Percent Complete	The calculated percentage of project completion, typically based on costs or effort.
Branch	The business branch associated with the project.
Department	The department responsible for or associated with the project.

Default Sorting

The WF_Queue_Project_List is ordered by default in the following manner:

#	Column	Method
1	ProjectNo	Ascending

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: Accounts Payable

Path: Workflow > Accounts Payable
Workflow No: 360Q957034

Purpose

The purpose of the Accounts Payable workflow is to provide a centralized and streamlined process for managing vendor invoices, from purchase order receipt through to payment. It facilitates the vouchering of received purchase orders, manages unposted and unreleased vouchers, and organizes payment queues for checks and direct payments, culminating in a clear view of aged payables.

Benefits

- Streamlines the vendor invoice and payment lifecycle, from PO receipt to final payment.
- Improves accuracy in voucher creation by linking directly to received Purchase Order items.
- Enhances visibility into outstanding liabilities with a clear overview of unposted and unreleased vouchers.
- Facilitates timely vendor payments through organized queues for check printing and direct payments.
- Provides a clear, up-to-date view of Aged Payables, enabling proactive management of outstanding debts.
- Increases efficiency by automating the generation of recurring vendor vouchers.
- Improves financial control by managing the progression of vouchers through posting and release for payment stages.
- Aids in cash flow planning by highlighting due payments and aging payables.
- Reduces manual effort and potential for errors in the accounts payable process.
- Supports better vendor relationship management through efficient and transparent payment processing.

Workflow Filters

Caption	Description	Type	Options	Default
Company	User-selectable. This filter allows users to specify the company (List) for which Accounts Payable data will be displayed and processed within the workflow. Changing this filter refines the information across all relevant buckets to that specific entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to select a specific branch to view and manage Accounts Payable activities. It narrows down the data in the workflow buckets to the chosen branch, or all branches if 'ALL' is selected.	List		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Received POs to Voucher

The purpose of the Count of Received POs to Voucher bucket is to display the number of Purchase Orders that have items marked as received and are now awaiting the creation of a corresponding vendor voucher (vendor invoice). This helps track the progression of purchases from receipt to the payables process.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. This filter allows users to specify the company (List) for which Accounts Payable data will be displayed and processed within the workflow. Changing this filter refines the information across all relevant buckets to that specific entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to select a specific branch to view and manage Accounts Payable activities. It narrows down the data in the workflow buckets to the chosen branch, or all branches if 'ALL' is selected.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered where the SubType parameter is set to 'ALL'.
Exclusion	Excludes Purchase Orders with a status of 'CANCELLED'.
Exclusion	Excludes Purchase Orders with a PO Type of 'RECURRING'.
Inclusion	Includes Purchase Order Items that have a status of 'RECEIVED' or 'RETURNED'.
Inclusion	Includes Purchase Order Items that do not yet have an associated vendor invoice number (i.e., have not been vouchered).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: PO Voucher Queue.
- **Parameters Passed:**
  - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0125)

The data for this bucket is sourced from Report No: **WF_Queue_PO_Voucher** (Q0125). This report lists Purchase Orders that have received items and are pending voucher creation. It provides essential details such as the Purchase Order number, vendor name, PO date, salesperson, and the linked sales order number, facilitating the accounts payable process by identifying which POs are ready for vendor invoice entry.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Purchase Order form.
Purchase No	The unique identifier of the Purchase Order.
Company	The name of the vendor associated with the Purchase Order. Sourced from Customer information.
Invoice Date	The date the Purchase Order was created. Sourced from Purchase Order information.
Salesperson	The salesperson associated with the Purchase Order, often linked from an original sales order.
Contract No	The identifier of the sales order to which this Purchase Order is linked.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Drop-shipped POs to Receive

The purpose of the Count of Drop-shipped POs to Receive bucket is to display the number of Purchase Orders that are marked for drop shipment and are currently awaiting receipt. This allows users to track items that will be shipped directly from the vendor to the end customer or job site and manage their receiving process accordingly.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. This filter allows users to specify the company (List) for which Accounts Payable data will be displayed and processed within the workflow. Changing this filter refines the information across all relevant buckets to that specific entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to select a specific branch to view and manage Accounts Payable activities. It narrows down the data in the workflow buckets to the chosen branch, or all branches if 'ALL' is selected.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered where the SubType parameter is set to 'ALL'.
Constant Filter	The data is filtered to only include Purchase Orders marked for drop shipment (DropShipOnly = 'Y').
Inclusion	Includes Purchase Orders that are in an 'APPROVED' or 'CONFIRMED' status, depending on system configuration for PO Approval.
Exclusion	Excludes Purchase Orders with a type of 'RECURRING'.
Inclusion	Includes Purchase Order Items that are not in 'CANCELLED', 'RETURNED', or 'RECEIVED' status and have a quantity ordered greater than zero.
Inclusion	Focuses on Purchase Order Items that are marked for drop-shipment.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0095).
- **Parameters Passed:**
  - The 'CompanyNo' parameter of the target form is set using the current value of the workflow filter 'Company'.
  - The 'List' parameter of the target form is set using the current value of the workflow filter 'List'.
  - The 'SubType' parameter of the target form is set using the current value of the workflow filter 'ALL'.
  - The 'DropShipOnly' parameter of the target form is set using the current value of the workflow filter 'Y'

Bucket Data Source (Report No: Q0095)

The data for this bucket is sourced from Report No: **WF_Get_POReceive_Q** (Q0095). This report returns a list of Purchase Orders that are pending receipt, focusing on those items that may be directly shipped to a customer or job site (drop-shipped) or standard receipts. The report provides details necessary to manage the PO receiving process, including PO numbers, vendor information, order dates, and related project or service call information if applicable. It filters based on company, branch, PO subtype, and whether to exclusively show drop-shipped items.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Purchase Order form for the specific Purchase Order.
Date	The creation date of the Purchase Order.
Purchase No	The unique identifier for the Purchase Order. This column may also display internal notes associated with the Purchase Order as a cell note.
Vendor	The name of the vendor from whom the items on the Purchase Order are sourced.
Exp. Date	The expected delivery date for the items on the Purchase Order. If this date is past the current system date, the row color may change to indicate it's overdue.
Buyer	The identifier of the buyer or user who created the Purchase Order.
Branch	The branch associated with the Purchase Order.
Dept	The department associated with the Purchase Order.
Sales Rep.	The salesperson associated with the original sales order linked to the Purchase Order, if applicable.
Order No	The identifier of the sales order (or RMA Return PO Type) to which the Purchase Order is linked.
Call No.	The service call number if the Purchase Order is related to a service call.
CSR	The Customer Service Representative associated with the service call, if the Purchase Order is linked to one.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
Project No	The project number if the Purchase Order is related to a project.
PM	The Project Manager assigned to the project, if the Purchase Order is linked to one.
PO Type	The type of the Purchase Order (e.g., SALE, RMARETURN).

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Generate Recurring Vouchers

The purpose of the Generate Recurring Vouchers bucket is to initiate the process of creating vendor vouchers based on predefined recurring Purchase Order schedules. Clicking this bucket triggers an action to scan for and generate vouchers for payments that are due according to their recurrence settings, such as monthly software subscriptions or service fees.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Bill Recurring POs.
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Un-Posted / Un-Released Vouchers

The purpose of the Count of Un-Posted / Un-Released Vouchers bucket is to display the number of vendor vouchers (invoices) that have been entered into the system but are either not yet posted to the general ledger or, if posted, are not yet released for payment. This provides a control point for reviewing and authorizing vouchers before they proceed to payment processing.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. This filter allows users to specify the company (List) for which Accounts Payable data will be displayed and processed within the workflow. Changing this filter refines the information across all relevant buckets to that specific entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to select a specific branch to view and manage Accounts Payable activities. It narrows down the data in the workflow buckets to the chosen branch, or all branches if 'ALL' is selected.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered where the SubType parameter is set to 'ALL'.
Constant Filter	The PostedOnly parameter is set to blank, meaning it can include both posted and unposted vouchers depending on other logic.
Constant Filter	The InclZeroBalance parameter is set to blank, meaning by default it might exclude zero balance vouchers unless overridden or specific logic includes them.
Inclusion	Includes Vendor Invoices that are not yet released for payment (ReleasedFlag does not equal 'Y').
Inclusion/Exclusion	Depending on the 'PostedOnly' parameter (which is blank by default from constant filter mapping), it may show unposted vouchers, or if 'Y', only posted vouchers. Based on typical usage, this queue shows unposted vouchers OR posted but unreleased vouchers.
Inclusion/Exclusion	Depending on the 'InclZeroBalance' parameter (which is blank by default from constant filter mapping), it may exclude zero balance vouchers. Typically, this queue shows vouchers with outstanding balances.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Unreleased Voucher Queue.
- **Parameters Passed:**
  - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.
  - The 'branch' parameter of the target form is set using the current value of the workflow filter 'List'.

Bucket Data Source (Report No: Q0143)

The data for this bucket is sourced from Report No: **WF_Queue_Unreleased_Vouchers** (Q0143). This report lists vendor invoices (vouchers) that are in the system but have not yet been released for payment. It can also be configured to show only unposted vouchers or include zero-balance vouchers. The report typically displays key details like the invoice number, vendor invoice number, vendor name, invoice date, due date, and amount, helping users manage the approval and release workflow for payables.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Vendor Invoice (Voucher) form.
Invoice No	The internal identifier for the Vendor Invoice (Voucher).
Voucher No	The Vendor's invoice number.
Company	The name of the vendor.
Invoice Date	The date of the Vendor Invoice.
End Date	The due date for payment of the Vendor Invoice.
Inv Amount	The total amount of the Vendor Invoice.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Checks To Print

The purpose of the Checks To Print bucket is to provide a queue of vendor vouchers that have been approved and released for payment via check. This bucket allows users to select vouchers, generate, and print physical checks for vendor payments, ensuring a controlled and organized check disbursement process.

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The data is filtered based on a 'Today' parameter for the date, typically showing vouchers due for payment as of the current date.
Constant Filter	The data is filtered for a specific bank account (defaulted to '1011' in the workflow definition), from which checks will be issued.
Inclusion	Includes Vendor Invoices where the balance is not fully paid (paid amount does not equal invoiced amount).
Inclusion	Includes Vendor Invoices that are marked as released for payment.
Inclusion	Includes Vendor Invoices where the payment method is 'CHECK' or 'CHEQUE', or if the payment method is not specified.
Inclusion	Filters for vouchers due on or before the specified date parameter (which is 'Today' by default).

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Check Queue (checkqueue).
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.

Bucket Data Source (Report No: Q0108)

The data for this bucket is sourced from Report No: **WF_Queue_Check** (Q0108). This report lists vendor invoices (vouchers) that are due for payment by check from a specified bank account as of a given date. It provides details such as the voucher number, vendor name, vendor invoice number, outstanding balance, and payment terms, facilitating the check printing process.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Vendor Invoice (Voucher) form.
Voucher No	The internal identifier for the Vendor Invoice (Voucher).
Company	The name of the vendor to be paid. If a specific payee name is on the voucher, that is used; otherwise, the vendor's company name is displayed.
Vendor Invoice No	The vendor's original invoice number.
Balance	The outstanding amount to be paid on the voucher.
Payment Terms	The payment terms agreed upon with the vendor (e.g., NET 30).
Due Date	The date by which the voucher payment is due.
Print Flag	Indicates if the voucher is selected for printing (this is a control field within the queue, not stored data).
Discount	Any applicable early payment discount amount (this is a control field for potential discount, not stored data).
Address1	The first line of the vendor's address.
Address2	The second line of the vendor's address.
City	The city of the vendor's address.
State	The state or province of the vendor's address.
Country	The country of the vendor's address.
Zip	The postal or zip code of the vendor's address.
Payee No	The payee number, if different from the vendor number.
Invoice Date	The date of the vendor's original invoice.
Checksum Amount	The original total amount of the vendor invoice, used for verification.
Reference No	A reference number associated with the voucher.
Bank Account	The bank account from which the payment will be made.
Invoice Amount	The total amount of the vendor invoice.
Customer No	The vendor's unique identifier.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Direct Payments

The purpose of the Direct Payments bucket is to manage and process vendor payments that are made through electronic means, such as ACH, wire transfers, or other non-check methods. It provides a queue for selecting vouchers due for direct payment and initiating the payment process, often integrating with banking systems or payment gateways.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Direct Payment Queue.
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Aged AP

The purpose of the Count of Aged AP bucket is to provide a summary count of outstanding vendor invoices (vouchers) categorized by their aging periods. This allows for a quick assessment of the total number of payables and helps prioritize payments and manage cash flow by understanding the age of outstanding debts.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company	User-selectable. This filter allows users to specify the company (List) for which Accounts Payable data will be displayed and processed within the workflow. Changing this filter refines the information across all relevant buckets to that specific entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to select a specific branch to view and manage Accounts Payable activities. It narrows down the data in the workflow buckets to the chosen branch, or all branches if 'ALL' is selected.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	The End Date parameter is set to blank, implying the aging is typically calculated as of the current date or a user-specified 'as of' date within the target action.
Constant Filter	The Currency parameter is set to 'ALL', including vouchers in all currencies unless specified otherwise in the target action.
Constant Filter	The Vendor Number parameter is set to blank, including all vendors unless specified otherwise in the target action.
Constant Filter	The List parameter is set to 'ALL', including all departments unless specified otherwise in the target action.
Constant Filter	The SubType parameter is set to 'ALL', including all vendor subtypes unless specified otherwise in the target action.
Constant Filter	The Age By parameter is set to blank, meaning the aging method (e.g., by invoice date or due date) is determined by the target action's default or user selection.
Inclusion	Includes Vendor Invoices that have been posted.
Exclusion	Excludes voided invoices.
Inclusion	Only includes Vendor Invoices where the calculated outstanding balance (after considering payments or adjustments made after the report's 'as of' date) is not zero.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Aged AP .
- **Parameters Passed:**
    - The 'companyno' parameter of the target form is set using the current value of the workflow filter 'Company'.
    - The 'branch' parameter of the target action is set using the current value of the workflow filter 'List'.
    - The 'department' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'currency' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'subtype' parameter of the target form is set using the current value of the workflow filter 'ALL'.
    - The 'asofdate' parameter of the target form is set using the current value of the workflow filter 'Today'.
    - The 'agedby' parameter of the target form is set using the current value of the workflow filter 'Blank'.

Bucket Data Source (Report No: Q0102)

The data for this bucket is sourced from Report No: **WF_Print_AGEDAP** (Q0102). This report provides a detailed listing of outstanding vendor invoices (vouchers) aged according to specified periods (e.g., 0-30 days, 31-60 days, etc.). It helps in analyzing the company's accounts payable, identifying overdue payments, and managing cash outflows. The report can be filtered by company, end date, currency, vendor, branch, department, vendor subtype, and aging method (by invoice date or due date).
The report calculates outstanding balances for each vendor invoice as of the specified end date, considering any payments or adjustments. It displays vendor details, invoice information, and the aged balances across different aging periods. This information is crucial for financial planning and maintaining good vendor relations.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the detailed Vendor Invoice (Voucher) form using the internal invoice number.
Invoice Date	The original date of the vendor's invoice.
Vendor Invoice No	The invoice number provided by the vendor.
Company	The name of the vendor.
Invoice No	The internal identifier for the vendor invoice.
Days Wait	The number of days the invoice has been outstanding, calculated based on the 'Age By' parameter (Invoice Date or Due Date) relative to the report's 'End Date'. Negative values are displayed as 0.
Balance	The outstanding balance of the vendor invoice as of the report's 'End Date', adjusted for any payments or credits applied after this date but before the current system date.
Customer No	The unique identifier for the vendor in Q360.
Total	The original total amount of the vendor invoice.
InvAmount	The outstanding balance of the invoice.
InvTotal	The original total amount of the vendor invoice.
PaidAmount	The total amount paid against the vendor invoice, adjusted for any payments made after the report's 'End Date'.
PaidDate	The date of the last payment made against the vendor invoice.
DaysDue	The number of days the invoice is past its due date, or days until due, calculated relative to the report's 'End Date'. Negative values are displayed as 0.
APAmount	The sum of AP Journal entries (payments/credits) made against the invoice after the report's specified 'End Date'. This value is used to adjust the reported balance to reflect the situation as of the 'End Date'.
Address1	The first line of the vendor's address.
Address2	The second line of the vendor's address.
City	The city of the vendor's address.
Contact	The primary contact person for the vendor.
Country	The country of the vendor's address.
Phone	The vendor's phone number.
SalesRep	The internal salesperson associated with the vendor account, if applicable.
State	The state or province of the vendor's address.
EndDate	The due date of the vendor invoice.
DueDate	The due date for payment of the vendor invoice. (Same as EndDate in this context).
ReleasedFlag	Indicates if the vendor invoice has been released for payment ('Y' or 'N').
PayeeNo	The payee number if different from the vendor number.
BankAccount	The bank account associated with the vendor invoice for payment.
CompanyNo	The Q360 entity (company code) associated with the vendor invoice.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Column Name	Description
PurchaseNo	The Purchase Order number linked to the vendor invoice, if applicable.
PostDate	The date the vendor invoice was posted to the General Ledger.
CurrencyType	The currency of the vendor invoice. Defaults to the system's default currency if not specified on the invoice.
Branch	The branch associated with the vendor invoice.
Department	The department associated with the vendor invoice.
SubType	The subtype classification of the vendor (e.g., trade, expense).
Curr	The outstanding balance in the aging period: Current (0-30 days).
N31to60	The outstanding balance in the aging period: 31-60 days.
N61to90	The outstanding balance in the aging period: 61-90 days.
N91plus	The outstanding balance in the aging period: 91+ days.
NTotal	The total outstanding balance across all aging periods for the vendor/report.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Workflow: HR

Path: Workflow > HR Workflow
Workflow No: 360Q957302

Purpose

The purpose of the HR Workflow is to provide a centralized overview of several critical employee-related concerns and activities. It empowers HR personnel and managers to proactively manage employee data, track upcoming deadlines for skills and reviews, monitor activities requiring follow-up, and access essential HR functions like time bill approvals and vacation schedules, thereby enhancing operational efficiency and employee management.

Benefits

- Timely follow-up on pending employee-related activities and tasks.
- Improved tracking and preparation for upcoming employee performance reviews.
- Streamlined process for reviewing and approving employee time bills.
- Convenient access to employee vacation and time-off schedules.
- Increased compliance with internal HR policies and external regulatory requirements.
- Reduction in administrative overhead through centralized information and quick actions.
- Supports data-driven decision-making for HR and departmental managers.

Workflow Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if 'ALL' is selected.	List		ALL

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Active Employees

The purpose of the Count of Active Employees bucket is to display the total number of currently active employees within the selected List and List. This provides a quick, real-time snapshot of the current workforce size, filtered by the main workflow filter selections.

Bucket Filters

The data returned in this bucket is filtered based on the following filters that are configured at the workflow level:

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if 'ALL' is selected.	List		ALL

Bucket Inclusions/Exclusions

The data in this bucket is subject to the following inclusions/exclusions:

Type	Description
Constant Filter	Includes employees from all departments.
Constant Filter	Restricted to employees with an 'ACTIVE' status.
Constant Filter	No additional custom filtering conditions are applied by default via ps_Where.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0115).
- **Parameters Passed:** None**.**

Bucket Data Source (Report No: Q0115)

The data for this bucket is sourced from Report No: **WF_Queue_HREmployee_List** (Q0115). This report returns a list of employees based on the specified entity, branch, department, and status code. It provides key demographic and employment details for each employee matching the filter criteria, forming the basis for the count in this bucket.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

The drilldown reported data for this bucket includes the following columns (in default display order):

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee form for the selected employee.
Employee No	The unique identifier for the employee, sourced from Employee information.
First Name	The first name of the employee, sourced from Employee information.
Last Name	The last name of the employee, sourced from Employee information.
User ID	The User ID associated with the employee. Allows drilling down to the User Maintenance screen for this user.
Gender	The gender of the employee, as recorded in Employee information.
Start Date	The employment start date of the employee, sourced from Employee information.
Status Code	The current employment status code of the employee (e.g., ACTIVE), sourced from Employee information.
Company No	The entity (Company No.) associated with the employee, sourced from Employee information.
Branch	The branch associated with the employee, sourced from Employee information.
Department	The department associated with the employee, sourced from Employee information.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Activities to Follow Up

The purpose of the **Count of Activities to Follow Up** bucket is to highlight the number of employee-related activities that are currently due for follow-up. This enables HR staff and managers to address pending items promptly, ensuring no important tasks are overlooked.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Includes activities for employees from all departments.
Constant Filter	Filters for activities associated with employees who have an **ACTIVE** status.
Constant Filter	Excludes activities with a status of **CLOSED** or **COMPLETED**.
Constant Filter	No specific activity statuses are predefined for inclusion by a constant filter.
Constant Filter	No additional custom filtering conditions are applied by default via **ps_Where**.
Inclusion	Includes only activities where a follow-up date is specified and is on or before the current system date.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0112).
- **Parameters Passed:** None

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0112)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeActivity_List** (Q0112). This report lists employee activities that require follow-up. It retrieves activities based on employee criteria (entity, branch, department, status) and activity-specific filters. For this bucket, it specifically includes activities with a follow-up date on or before today, and excludes activities that are already **CLOSED** or **COMPLETED**.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Activity form for the selected activity.
Employee No	The unique identifier for the employee associated with the activity.
First Name	The first name of the employee associated with the activity.
Last Name	The last name of the employee associated with the activity.
Title	The title or subject of the employee activity.
Follow Up Date	The date on which the activity is scheduled for follow-up. The report includes activities with a follow-up date on or before the current date.
Activity Type	The type classification of the employee activity.
User ID	The User ID of the employee associated with the activity. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Skills Expiring in 30 Days

The purpose of the **Count of Skills Expiring in 30 Days** bucket is to alert HR and managers to employee skills or certifications that are due to expire within the next 30 days. This allows for timely intervention to arrange renewals or re-certifications, ensuring compliance and skill readiness.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Restricted to skills that have an expiry date and are expiring within the next 30 days from the current system date.
Constant Filter	Includes skills for employees from all departments.
Constant Filter	Filters for skills related to employees with an **ACTIVE** status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0114).
- **Parameters Passed:** None

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source (Report No: Q0114)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeSkill_List** (Q0114). This report lists employee skills and certifications. For this specific bucket, it is configured to show only those skills that have a defined expiry date and are set to expire within the next 30 days from the current system date, for employees who are currently active.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Skill form for the selected skill record.
Employee No	The unique identifier for the employee who possesses the skill.
First Name	The first name of the employee.
Last Name	The last name of the employee.
Skill	The name or code of the skill or certification.
Description	A description of the skill or certification.
Expiry Date	The date on which the employee's skill or certification expires. This bucket specifically filters for skills expiring within the next 30 days.
User ID	The User ID of the employee. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Skills Expiring in 30 to 60 Days

The purpose of the **Count of Skills Expiring in 30 to 60 Days** bucket is to provide a medium-term view of employee skills or certifications nearing expiration, specifically those expiring between 31 and 60 days from the current date. This allows for proactive planning for renewals and training.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Restricted to skills that have an expiry date and are expiring between 31 and 60 days (inclusive) from the current system date.
Constant Filter	Includes skills for employees from all departments.
Constant Filter	Filters for skills related to employees with an **ACTIVE** status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0114).
- **Parameters Passed:** None

Bucket Data Source (Report No: Q0114)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeSkill_List** (Q0114). This report lists employee skills and certifications. For this bucket, it is specifically filtered to display skills of active employees that are set to expire between 31 and 60 days from the current system date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Skill form for the selected skill record.
Employee No	The unique identifier for the employee who possesses the skill.
First Name	The first name of the employee.
Last Name	The last name of the employee.
Skill	The name or code of the skill or certification.
Description	A description of the skill or certification.
Expiry Date	The date on which the employee's skill or certification expires. This bucket specifically filters for skills expiring between 31 and 60 days from the current date.
User ID	The User ID of the employee. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Expired Skills

The purpose of the **Count of Expired Skills** bucket is to identify and display the total number of employee skills or certifications that have already passed their expiry date. This helps in addressing compliance gaps, identifying immediate training needs, and planning for re-certification for active employees.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Restricted to skills that have an expiry date and where the expiry date is before the current system date.
Constant Filter	Includes skills for employees from all departments.
Constant Filter	Filters for skills related to employees with an **ACTIVE** status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0114).
- **Parameters Passed:** None

Bucket Data Source (Report No: Q0114)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeSkill_List** (Q0114). This report lists employee skills and certifications. For this particular bucket, it is configured to display skills of active employees where the expiry date has already passed as of the current system date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Skill form for the selected skill record.
Employee No	The unique identifier for the employee who possesses the skill.
First Name	The first name of the employee.
Last Name	The last name of the employee.
Skill	The name or code of the skill or certification.
Description	A description of the skill or certification.
Expiry Date	The date on which the employee's skill or certification expired. This bucket specifically filters for skills with an expiry date prior to the current date.
User ID	The User ID of the employee. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Upcoming Reviews in 30 Days

The purpose of the **Count of Upcoming Reviews in 30 Days** bucket is to highlight employee performance reviews or other scheduled reviews that are due within the next 30 days. This enables managers and HR to prepare for and conduct these reviews in a timely manner.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Restricted to employee reviews that have a review date and are scheduled within the next 30 days from the current system date.
Constant Filter	Includes reviews for employees from all departments.
Constant Filter	Filters for reviews related to employees with an **ACTIVE** status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0113).
- **Parameters Passed:** None

Bucket Data Source (Report No: Q0113)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeReview_List** (Q0113). This report lists scheduled employee reviews. For this bucket, it is specifically configured to show reviews for active employees that are scheduled to occur within the next 30 days from the current system date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Review form for the selected review record.
Employee No	The unique identifier for the employee to be reviewed.
First Name	The first name of the employee.
Last Name	The last name of the employee.
Title	The title or subject of the employee review.
Start Date	The start date of the period covered by the review.
End Date	The end date of the period covered by the review.
Review Date	The date on which the employee review is scheduled. This bucket filters for reviews scheduled within the next 30 days.
User ID	The User ID of the employee. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Count of Upcoming Reviews in 30 to 60 Days

The purpose of the **Count of Upcoming Reviews in 30 to 60 Days** bucket is to provide a medium-term forecast of employee reviews scheduled between 31 and 60 days from the current date. This assists HR and managers in planning and preparing for these reviews well in advance.

Bucket Filters

Caption	Description	Type	Options	Default
Company No	User-selectable. This filter allows users to narrow down the workflow data to a specific legal entity within the organization. Changing this filter will refresh all buckets to reflect employees and HR data pertinent to the selected entity.	List		Current User's Company
Branch	User-selectable. This filter allows users to focus the workflow on a specific branch or all branches. Modifying this will update the displayed employee information and related HR metrics across the workflow for the chosen branch(es), or show data for all branches if **ALL** is selected.	List		ALL

Bucket Inclusions/Exclusions

Type	Description
Constant Filter	Restricted to employee reviews that have a review date and are scheduled between 31 and 60 days (inclusive) from the current system date.
Constant Filter	Includes reviews for employees from all departments.
Constant Filter	Filters for reviews related to employees with an **ACTIVE** status.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Drills down to view the detailed data for this bucket (Report No: Q0113).
- **Parameters Passed:** None

Bucket Data Source (Report No: Q0113)

The data for this bucket is sourced from Report No: **WF_Queue_EmployeeReview_List** (Q0113). This report lists scheduled employee reviews. For this specific bucket, it is configured to display reviews for active employees that are scheduled to occur between 31 and 60 days from the current system date.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket Data Source Columns

Column Name	Description
Zoom Drilldown	Allows drilling down to the Employee Review form for the selected review record.
Employee No	The unique identifier for the employee to be reviewed.
First Name	The first name of the employee.
Last Name	The last name of the employee.
Title	The title or subject of the employee review.
Start Date	The start date of the period covered by the review.
End Date	The end date of the period covered by the review.
Review Date	The date on which the employee review is scheduled. This bucket filters for reviews scheduled between 31 and 60 days from the current date.
User ID	The User ID of the employee. Allows drilling down to the User Maintenance screen for this user.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Time Bill Approval

The purpose of the **Time Bill Approval** bucket is to provide a direct shortcut to the Time Bill Posting screen. This facilitates the efficient review and approval process for submitted employee time bills, ensuring timely processing for payroll and job costing.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: Time Bill Posting Screen
- **Parameters Passed:**
    - The **branch** parameter of the target form is set using the current value of the workflow filter **Branch**.
    - The **Company No** parameter of the target form is set using the current value of the workflow filter **Company No**.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.

Bucket: Vacation Schedule

The purpose of the **Vacation Schedule** bucket is to offer quick access to the HR Schedule screen. This allows users, typically HR personnel or managers, to easily view employee vacation requests, approved time-off, and overall team availability.

Bucket On Click

When this bucket is clicked, the following action occurs:

- **Action Type:** Opens the Q360 Form: HR Schedule Screen
- **Parameters Passed:**
    - The **Company No** parameter of the target form is set using the current value of the workflow filter **Company No**.
    - The **branch** parameter of the target form is set using the current value of the workflow filter **Branch**.

Portions of this documentation were co-authored by Solutions360 staff and AI tools. Please review this content carefully before integrating it with other processes.