

Mission Control for a Healthy System

Using *Mission Control* for Sales Analysis and Exploring
New Enhancements

Debbie Neal

A large, light blue, stylized wave graphic that curves across the upper half of the slide, partially overlapping the title text.

Benefits of Using Mission Control

The Why, Where, & What

Why Should You Use Mission Control?



Assist in keeping a healthy, happy system

Sales personnel's ability to view their projects in a list view and a found set

Overall viewing of job milestones

- Finding jobs that need to be invoiced
- Finding work orders that have not been processed
- Finding materials or labor that are not verified

Where do I find Mission Control?

Mission Control can be found on any Job above the project/job number

File Edit View Insert Format Records Scripts Window Help

Delete Find Find All Print Transfer List View Change Order Lock Export Refresh Web Help Set

Unlocked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed N/A Job Start Date Install Complete **Mission Control** 60 of 60

Job *One Point Floors*

Job Start Date: 8/29/2023
 Owner: Ware Construction
 General Contractor: N/A
 Architect: N/A
 Designer: N/A
 Project Manager: 1 One Point
 Accounting Manager: N/A
 Line Of Business: N/A
 Job Description: Company Office 3, Reception and Hall

Project # 3011
 Job # 3011
 Customer PO: N/A
 Date: 8/29/2023
 Plan Date: N/A
 Store: 1 One Point
 Entry Person: Debbie
 Sales Person 1: Debbie (100%)
 Sales Person 2: N/A


Q Sold To: June Smith, 726, 345 Apple Road, CARLSBAD, CA 92008, 60562
 Contact / Phone: [Red Arrow points here]
 Ship To: Ware Construction LLC, 987 South 34th St, Nashville, TN 37217, 12345
 Community / Plan: [Red Arrow points here]

Entry CRM Activities Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket Forms Project Sitefotos

Type	S	Q	W	U	Length	ID#	Product Description	Color / Item Number	Sell	Total	Actions
Line# 1	Materials	750		SY		4573	PHILADELPH Neyland ii 20 50510	30450 Freedom	A	\$24.48	\$18,360.00
	Labor	750		SY	12	8	Carpet Install Carpet Glue Down	Office 3 Reception Area, Hall		\$7.00	\$5,250.00
Notes: Includes Material Supplies Take-up and Disposal											
Line# 2	Materials	3		Each		2555	HENRY 256 Carpet Adhesive	4 Gallon (10-12 Sy Per Gal)	A	\$57.65	\$172.95
	Labor					7					
Line# 3	Labor	750		SY			Carpet Take up and Removal	N/A		\$5.25	\$3,937.50
Line# 4	Materials	4		Each		851	Ardex Sdp Self Drying Fast Setting Patch	40 Lbs 34jygFYRQ3UEH2HXQ 34jygFYRQ3UEH2HXQ	A	\$53.47	\$213.88
	Labor	1		EA			FLOOR FLOOR PREP F&L	Office 3 Reception Area, Hall		\$200.00	\$200.00
Notes: FLOOR PREP F&L											

Mission Control

ock Template Sessions Export Refres

Install Complete  Mission Control << < > >>

60 of 60

Project #

Job # Customer PO

Date Plan Date

Store Entry Person

Sales Person 1

What information does Mission Control provide?



- Brings over information from the status bar on jobs
- Project # (if applicable)
- Job #
- Job date
- Job Description
- Assigned sales team member
- Start Date (with Job Start Date Verification Indicator "C")
- GPM
- Budget Trend Indicator

Overview of Mission Control



Person	Start Date	GPM	+/-Budget	Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		88.75%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		88.21%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		72.73%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		50.66%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	3/21/2023	-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	3/23/2023			Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		38.20%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		41.38%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	5/31/2023	96.81%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		37.60%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	3/2/2023	91.30%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		95.63%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		34.27%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
		-3.10%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2/10/2023			Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp



Enhancements in Mission Control

Status Bar Additional Features

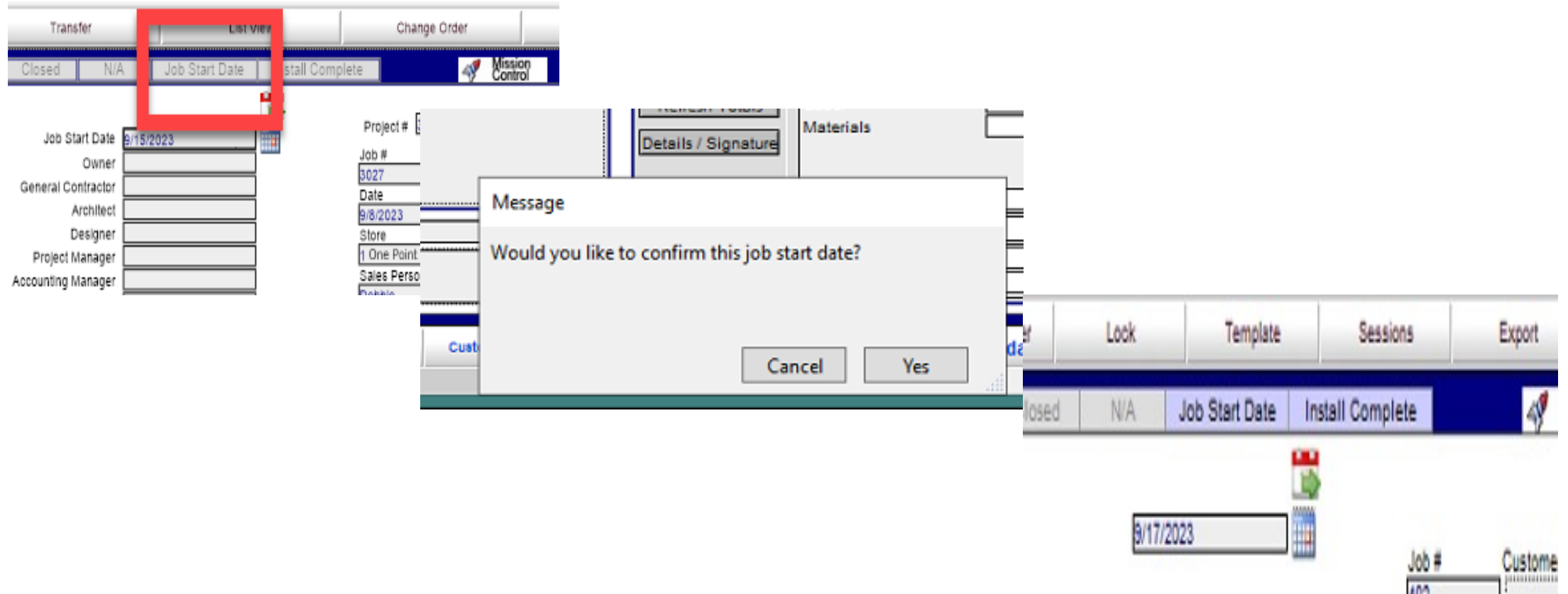
Job Start Date Verification



- Intended to be toggled manually by the user
- Click on the Job Start Date indicator in the status tab
- Confirmation Message asks the user to verify the date
- Blue(Periwinkle) indicates the process is verified
- Ability to reverse the verification
- Click on the Job Start Date Indicator
- Prompts will ask the user to confirm
- Grey for incomplete.

New Button on the Status Bar Indicator

Job Start Date Verification



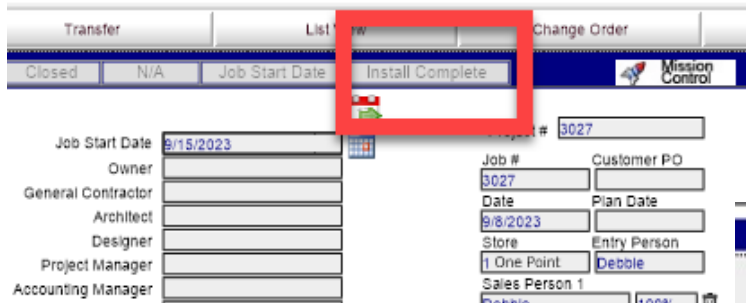
The image displays a software interface with a status bar at the top containing buttons for 'Transfer', 'List View', and 'Change Order'. Below this, a blue status bar shows 'Closed', 'N/A', 'Job Start Date', and 'Install Complete'. A red box highlights the 'Job Start Date' button. To the left, a form lists fields for 'Job Start Date' (9/15/2023), 'Owner', 'General Contractor', 'Architect', 'Designer', 'Project Manager', and 'Accounting Manager'. In the center, a 'Message' dialog box asks 'Would you like to confirm this job start date?' with 'Cancel' and 'Yes' buttons. To the right, another status bar shows 'Lock', 'Template', 'Sessions', and 'Export'. At the bottom, a date field shows '9/17/2023' and a 'Job #' field is partially visible.

Install Date Verification

- Intended to be toggled manually by the user
- Click on the Install Complete indicator in the status tab
- Confirmation Message asks the user to verify completion
- Blue(Periwinkle) indicates the process is verified
- Ability to reverse the verification
- Click on the Install Complete Indicator
- Prompts will ask the user to confirm
- Grey for incomplete.

New Button on the Status Bar Indicator

Install Complete Verification



Transfer | List | Change Order

Closed | N/A | Job Start Date | **Install Complete** | Mission Control

Job Start Date: 9/15/2023 | Job # 3027

Owner: | Customer PO: |

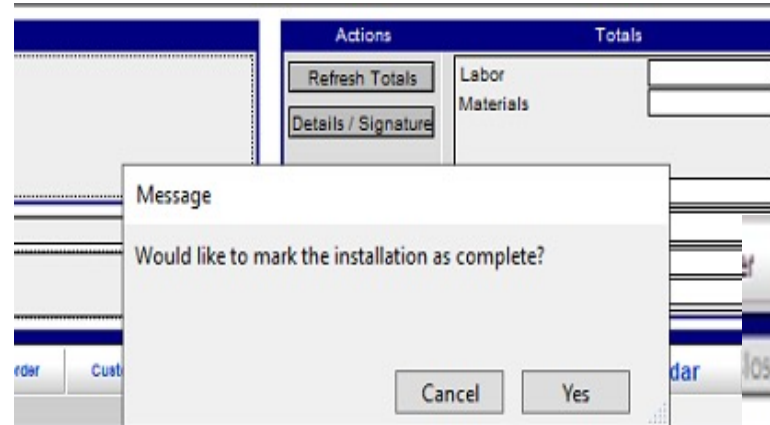
General Contractor: | Job #: 3027 |

Architect: | Date: 9/8/2023 |

Designer: | Store: | Entry Person: |

Project Manager: | One Point: Debble |

Accounting Manager: | Sales Person 1: |



Message

Would like to mark the installation as complete?

Cancel Yes



Lock | Template | Sessions | Export

Closed | N/A | Job Start Date | Install Complete | Mission Control

9/17/2023

Job # | Customer

Using Filters in Mission Control

Enhancements and Drilling Down on Search Fields

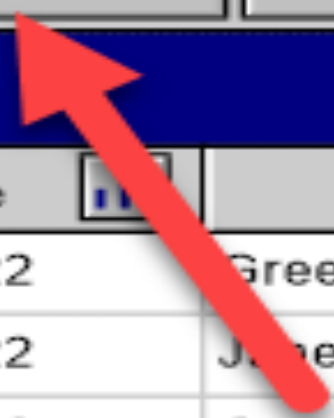
Location of Filter in Mission Control

File Edit View Insert Format Records Scripts Window

Return Show All Export Filters Refresh Statuses

Mission Control

Project #	Job #	Date	Job N
2716	2716	4/21/2022	Greenfield Apartments
2720	2720	4/25/2022	Janey Doey
2716	2716-1	4/25/2022	Greenfield Apartments
2726	2726	5/2/2022	Janey Doey
2728	2728	5/2/2022	Janey Doey



Exploring the Filter Options



Mission Control

Project #	Job #	Date	Job Name	Job Description	Sales Person	Start Date	GPM	+Budget	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set
2716	2716	4/21/2022	Greenfield Apartments		Debbie		55.23%								
2720	2720	4/25/2022	Janey Doey												
2716	2716-1	4/25/2022	Greenfield Apartments												
2726	2726	5/2/2022	Janey Doey												
2728	2728	5/3/2022	Johnny Doey												
2739	2739-1	5/11/2022	Johnny Doey												
2740	2740	5/11/2022	Johnny Doey												
2761	2761	6/24/2022	Mannington Commercial												
2771	2771	7/5/2022	Johnny Doey												
2784	2784	7/19/2022	JJ Contractor, INC												
2791	2791	8/9/2022	Janey Doey												
2792	2792	8/12/2022	Wares Construction INC												
2796	2796	8/31/2022	TT&D CLIENT 2 RVSD HB												
2797	2797	8/31/2022	TT&D CLIENT 2 RVSD HB												
2798	2798	8/31/2022	TT&D CLIENT 2 RVSD HB												
2800	2800	8/31/2022	TT&D CLIENT 2 RVSD HB												
2819	2819	9/28/2022	TT&D CLIENT 2 RVSD HB												
2853	2853	11/1/2022	Johnny Doey												
2858	2858	11/3/2022	Wares Construction INC												
2859	2859	11/3/2022	Johnny Doey												
2868	2859-1	11/22/2022	Johnny Doey												
2859	2859-2	12/8/2022	Johnny Doey												
2872	2872	12/20/2022	Wares Construction INC												
2873	2873	12/21/2022	Wares Construction INC												
2879	2879	12/30/2022	Wares Construction INC												
2884	2884	1/17/2023	Wares Construction INC												
2885	2885	1/17/2023	Wares Construction INC												
2886	2886	1/17/2023	Wares Construction INC												
2887	2887	1/19/2023	Wares Construction INC												
2887	2887-1	1/19/2023	Wares Construction INC												
2890	2890	1/20/2023	Wares Construction INC												
2890	2890-1	1/20/2023	Wares Construction INC												
2893	2893	1/24/2023	Wares Construction INC												
2893	2893-1	1/24/2023	Wares Construction INC												

Legend

- Status Complete
- Status In Progress
- Status Incomplete
- Unselected / No Preference

Applied Filters

Rev Rec: % Comp. Comp. Contract All

Store:

Sales Person:

Line of Business:

Written Date Range: to

Job Start Date Range: to

Job Close Date Range: to

Paid Date Range: to

Budget:

Exploring the Filter Options

Close

Legend Status Complete Status In Progress Status Incomplete Unselected / No Preference

Locked	Verified
Ordered	Invoiced
Work Order	Comm Set
WO Accepted	Comm Paid
Received	Closed
Scheduled	Paid
Delivered	Job Start Confirmed
Install Complete	

Rev Rec: % Comp. Comp. Contract All

Store:

Sales Person:

Line of Business:

Written Date Range: to

Job Start Date Range: to

Job Close Date Range: to

Paid Date Range: to

Budget:

Applied Filters

Save current filter:

Load a saved user filter:

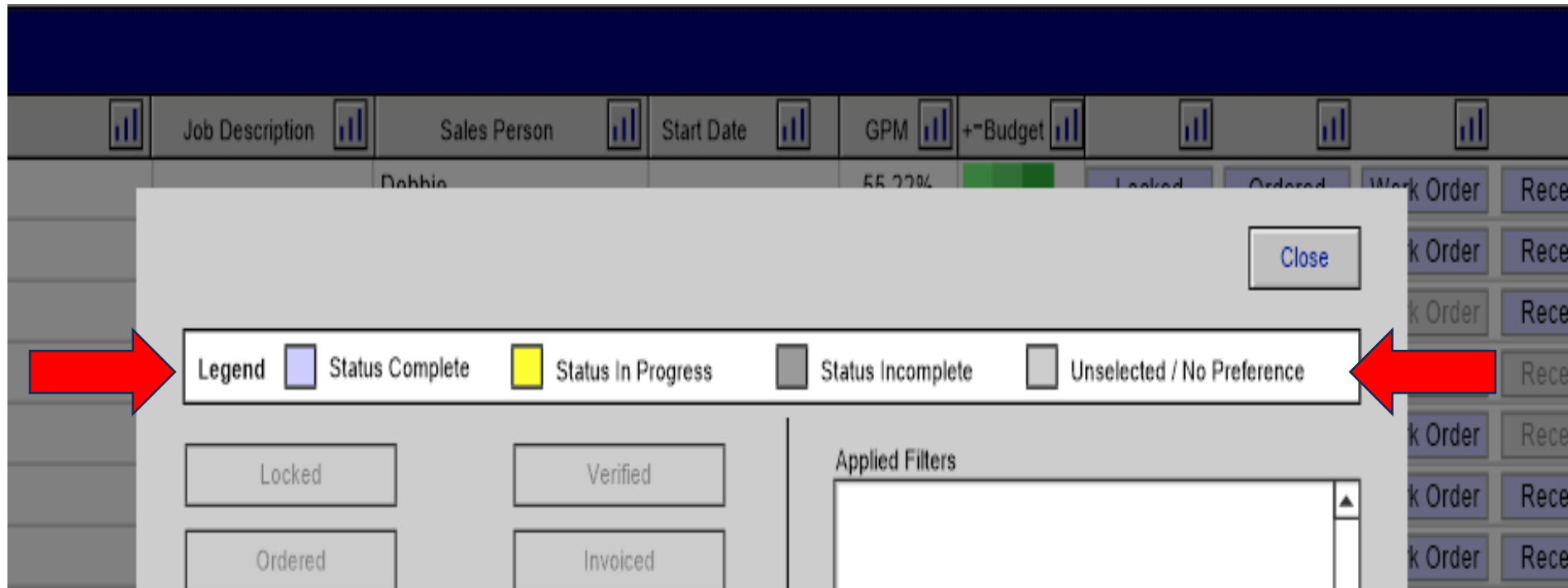
Load Month-End filter:

Enhancements in Mission Control Filters



- Intended to be toggled manually by the user
- Clicking on buttons to activate & deactivate filters
- Boxes have drop-downs or calendars
- Color changes
- Status Complete=Blue (Periwinkle)
- Status in Progress=Yellow
- Status Incomplete=Dark Grey
- Unselected/No Preference=Light Grey

View of Legend



Job Description Sales Person Start Date GPM +-Budget

Debbie 55.22%

Close

Legend Status Complete Status In Progress Status Incomplete Unselected / No Preference

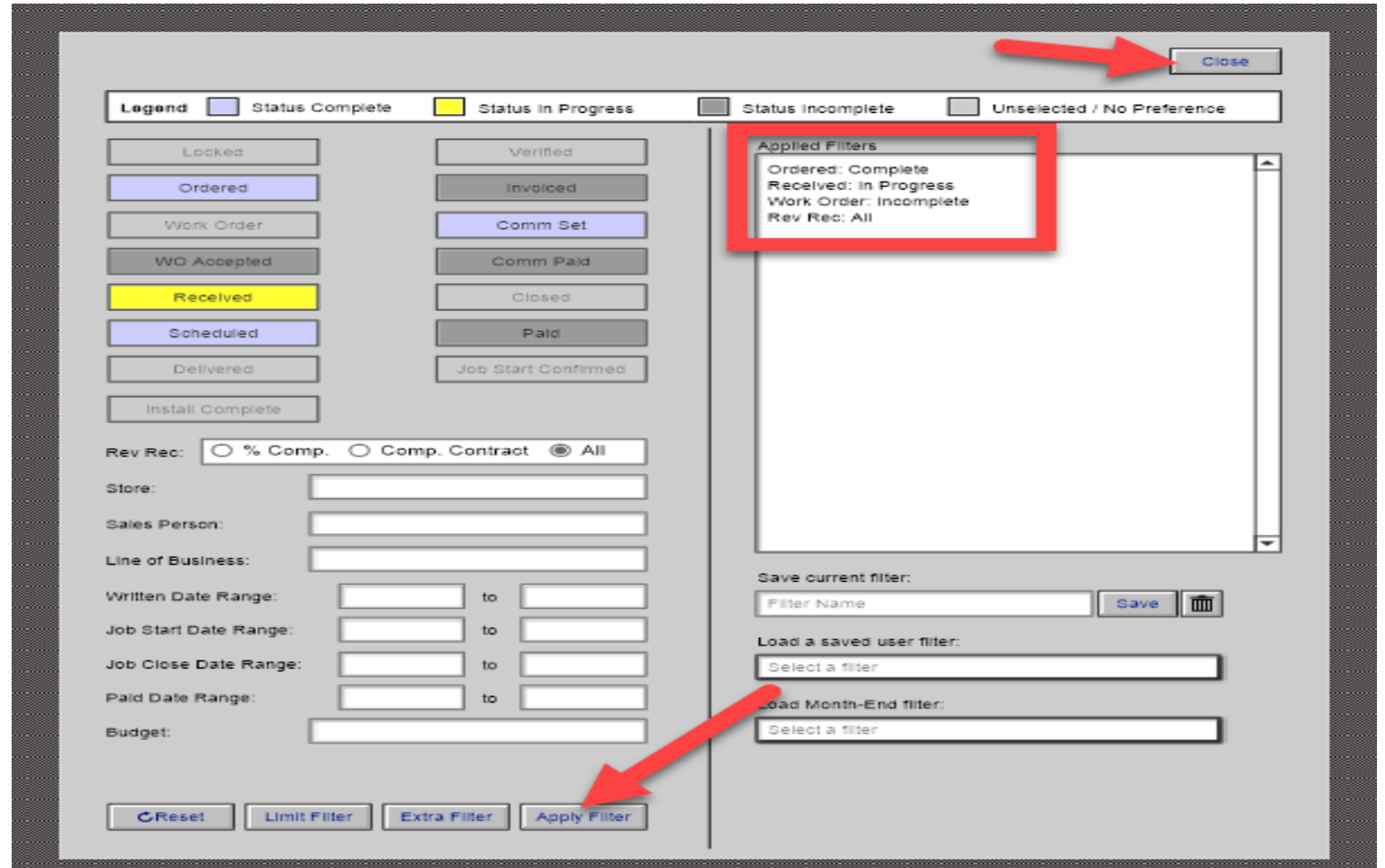
Locked Verified

Ordered Invoiced

Applied Filters

Setting Filters

- Choose filter options
- Apply Filter
- Use close to view filtered results



The screenshot shows a web-based filter configuration interface. At the top right, a red arrow points to a 'Close' button. Below the legend, a red box highlights the 'Applied Filters' section, which lists: 'Ordered: Complete', 'Received: In Progress', 'Work Order: Incomplete', and 'Rev Rec: All'. At the bottom, a red arrow points to the 'Apply Filter' button. The interface includes a legend with color-coded boxes for 'Status Complete' (blue), 'Status In Progress' (yellow), 'Status Incomplete' (grey), and 'Unselected / No Preference' (white). Below the legend are two columns of filter buttons: 'Locked', 'Ordered', 'Work Order', 'WO Accepted', 'Received', 'Scheduled', 'Delivered', 'Install Complete', 'Verified', 'Invoiced', 'Comm Set', 'Comm Paid', 'Closed', 'Paid', and 'Job Start Confirmed'. The 'Received' button is highlighted in yellow. Below the buttons are several input fields: 'Rev Rec' with radio buttons for '% Comp.', 'Comp. Contract', and 'All' (selected); 'Store'; 'Sales Person'; 'Line of Business'; 'Written Date Range'; 'Job Start Date Range'; 'Job Close Date Range'; 'Paid Date Range'; and 'Budget'. At the bottom, there are buttons for 'Reset', 'Limit Filter', 'Extra Filter', and 'Apply Filter'. On the right side, there are sections for 'Save current filter' (with a 'Filter Name' input, 'Save' button, and trash icon), 'Load a saved user filter' (with a 'Select a filter' dropdown), and 'Load Month-End filter' (with a 'Select a filter' dropdown).

Viewing Found Filtered Set

- Filter button illuminated red to indicate filters are activated
- Use the magnifying glass to activate the found set

File Edit View Insert Format Records Scripts Window Help

Return Show All Export **Filters** Refresh Statuses

Mission Control

Project #	Job #	Date	Job Name	Job Description	Sales Person	Start Date	GPM	+Budget	Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2140	2140	8/1/2017	Lumina		Davey Jones		35.33%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2156	2156	9/8/2017	Lumina		Tim Noe		25.00%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2159	2159	9/14/2017	Capitol Investments		Natalie Smith		20.64%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2162	2162	9/25/2017	JJJ Architects		Davey Jones		23.47%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2166	2166	9/29/2017	Turner		Davey Jones		22.08%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2172	10/5/2017			non classified		-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2173	2173	10/9/2017	Capitol Partners		Davey Jones		35.85%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2175	10/9/2017			Davey Jones		-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2188	2188	10/31/2018	Monterra West Ltd		Davey Jones		91.29%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2190	11/1/2018	Crymar Finishes		Davey Jones		32.03%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
18083	2190-1	11/1/2018	Crymar Finishes	Credit for not waxing	Davey Jones				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
18083	2190-2	11/1/2018	Crymar Finishes		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2206	12/7/2018			Davey Jones		-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2233	2233	1/24/2019	Fred Jones	Whole house opt	Tim Noe	1/25/2019	42.83%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
2243	2243	2/5/2019	Fred Jones		Davey Jones		37.50%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp
	2248	2/7/2019			Davey Jones		-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid	Closed	Paid	WO Accept	Install Comp

Found Set



File Edit View Insert Format Records Scripts Window Help

Navigation bar: Delete Find Find All Print Transfer List View Change Order Unlock Sessions

Job Status Bar: Locked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete Mission Control

Job: **One Point Floors**

Project # 2140

Job # 2140 Customer PO []

Date 8/1/2017 Plan Date []

Store 1 One Point Entry Person Davey Jones

Sales Person 1 Davey Jones 100%

Sales Person 2 []

Job Start Date []

Owner []

General Contractor []

Architect []

Designer []

Project Manager []

Accounting Manager []

Line Of Business []

Job Description []

Contact / Phone: Lumina, 701, 201 Folsom, San Francisco, CA 94197

Ship To: Lumina, 201 Folsom, San Francisco, CA 94197

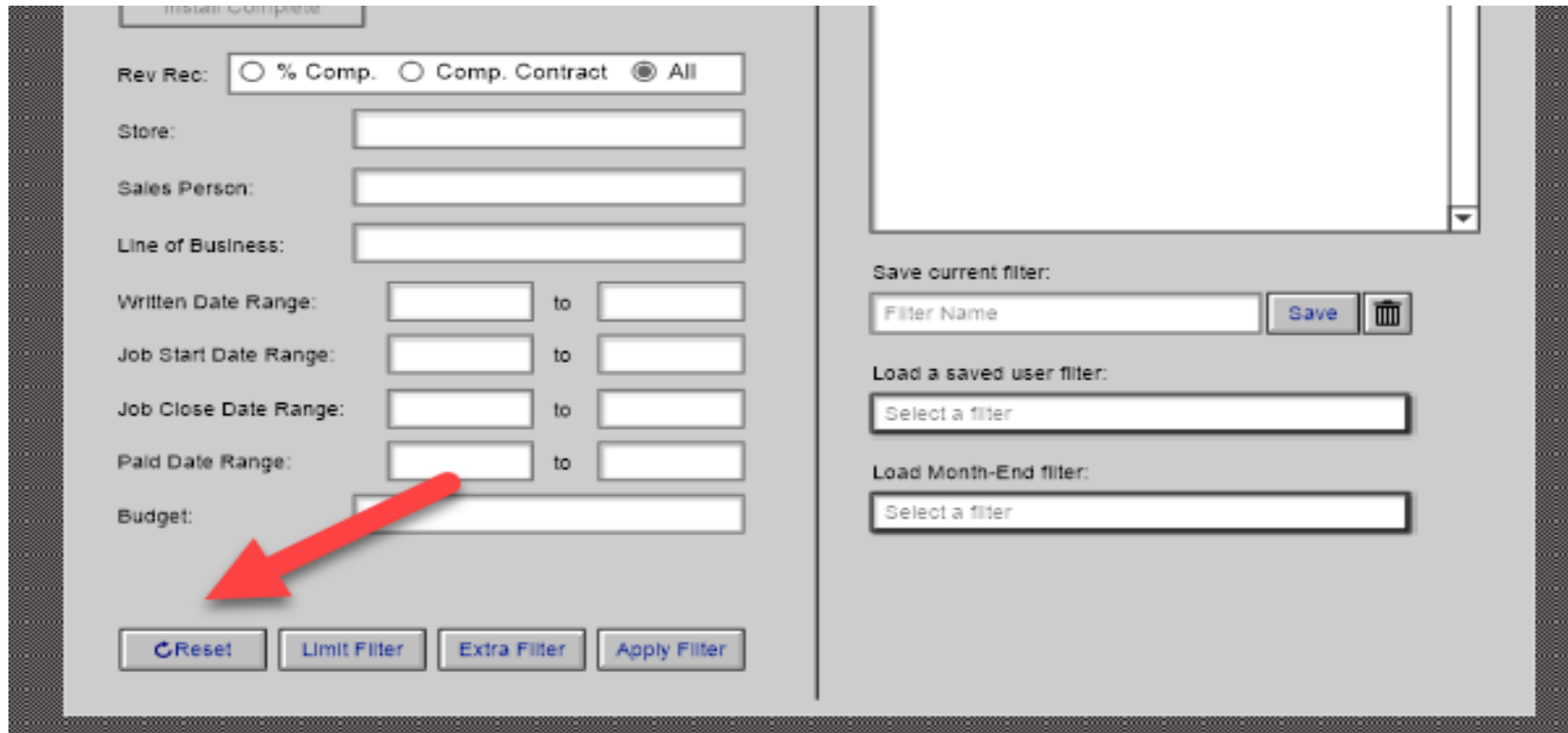
CRM Activity: Entry, Upgrades, Bundle, Status, Profits, Chg Orders, Job Mail, Pick Ticket, Forms, Project, Sitefotos

Filter Mat / Lab, Filter Product Type, Filter Procurement, Filter Job Progress, Filter Job Costs, Clear Filtering

Type	S.Quan	W.Quan	Unit	Length	ID#	Product Description	Color / Item Number
Carpet	1250		SqYd		2795	Bentley Kings Road 8kr420000t	880381 Marlgold
Line# 1	Labor	1250	SY			Carpet Install Carpet Glue Down	
Notes							
Customer							
Adhesive	4		Each		4530	Parabond 4 Gallon 4099 (60 Yrds Per Bucket)	4 Gallon
Line# 2	Labor				5		
Notes							
Customer							
Labor	1200		SY			Carpet Tile Install Carpet Tile - Ashlar	
Line# 3	Labor	1200	SY				
Notes							
Customer							

Clearing the Filter

- Use the Reset to Clear Filters



The screenshot shows a web application interface for filtering data. On the left side, there are several filter criteria with input fields and radio buttons:

- Rev Rec: % Comp. Comp. Contract All
- Store:
- Sales Person:
- Line of Business:
- Written Date Range: to
- Job Start Date Range: to
- Job Close Date Range: to
- Paid Date Range: to
- Budget:

At the bottom of the filter section, there are four buttons: **Reset**, **Limit Filter**, **Extra Filter**, and **Apply Filter**. A red arrow points to the **Reset** button.


On the right side of the interface, there are sections for saving and loading filters:


- Save current filter:
- Load a saved user filter:
- Load Month-End filter:

Other Features of Mission Control

Users' Restrictions, Default Filtered Settings, Setting Saved Filters

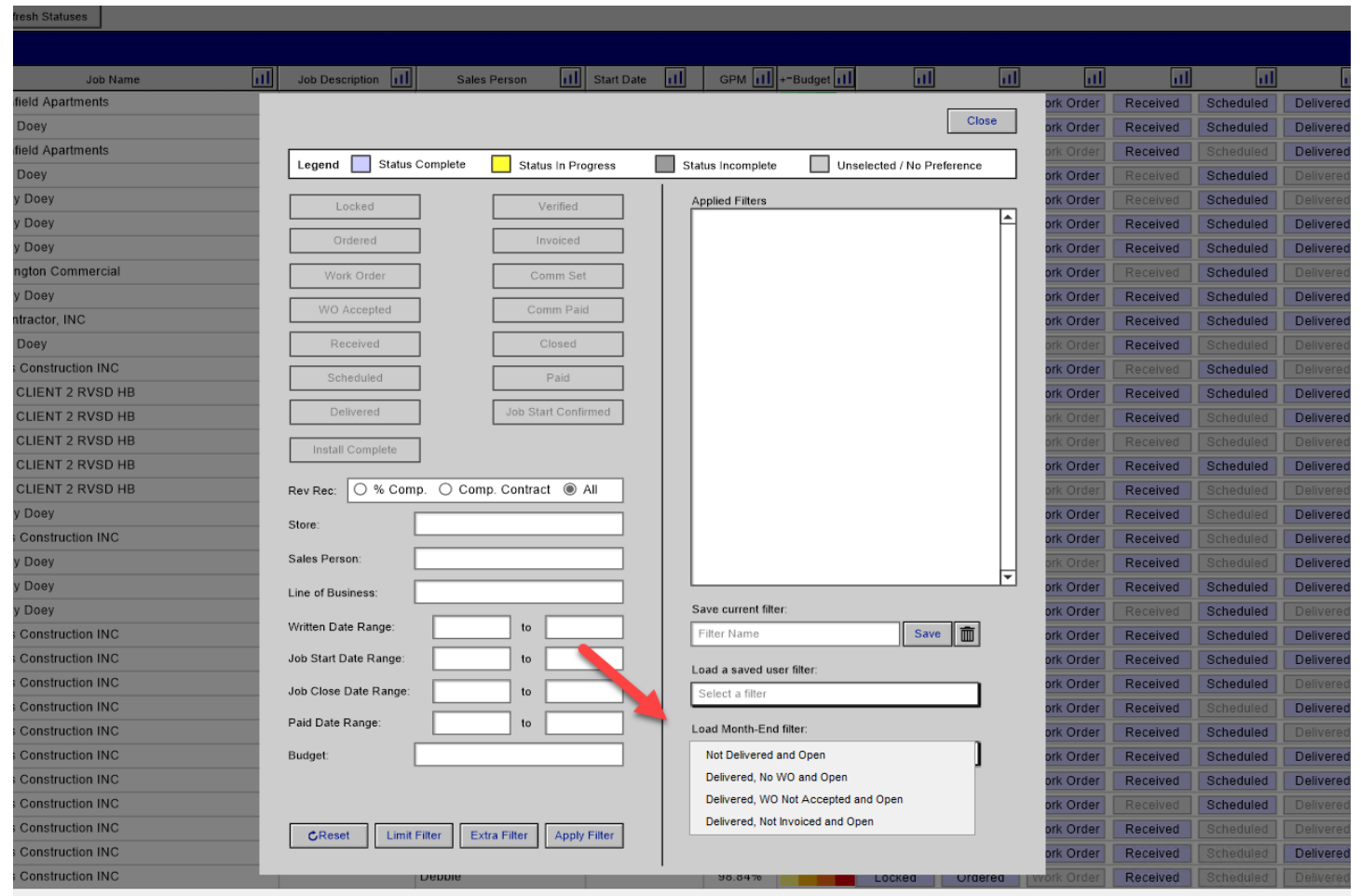
Mission Control Adheres to Users' Restrictions

Navigation Access	Closing Sales Requirements	Locking / Unlocking Job Options
Daily Calendar Access	<input checked="" type="checkbox"/> Close When Invoiced	<input checked="" type="checkbox"/> Allow Locking Sales
Bank Deposits	<input checked="" type="checkbox"/> Close When Delivered	<input checked="" type="checkbox"/> Allow Unlocking Sales
Quote Cost Access	<input checked="" type="checkbox"/> Close When Verified	<input checked="" type="checkbox"/> Allow Unlocking Closed Sales
Sales Est Cost Access	<input checked="" type="checkbox"/> Close When Commission's Set	<input checked="" type="checkbox"/> Restrict Unlocking Access (SP)
Sales Act Cost Access	<input checked="" type="checkbox"/> Close When Commission's Paid	
<u>Installer Cost Access</u>	<input checked="" type="checkbox"/> Close When Job's Paid	Enable Unlocked RR Job Modifications
Inventory Cost Access	<input checked="" type="checkbox"/> Close When COs Are Closed	<input type="checkbox"/> Allow Rev Rec Job Line Add / Delete
Inventory Tag Access	<input checked="" type="checkbox"/> Close When WO's Are Paid	<input type="checkbox"/> Allow Rev Rec Job Line Quan Mod
Payable Access		<input type="checkbox"/> Allow Rev Rec Job Line Budget Mod
Reconciliation Access	Restrictions	<input type="checkbox"/> Allow Rev Rec Job Line Sell Mod
Bank Deposit Access	<input type="checkbox"/> Restrict PO Access (SP)	<input type="checkbox"/> Allow Rev Rec Job Labor Line Lookups
Full Bank Account Access	<input type="checkbox"/> Restrict Quote Access (SP)	<input type="checkbox"/> Allow Job Line Date Editing
Limited Bank Account Access	<input type="checkbox"/> Restrict Quote Access (Branch)	<input type="checkbox"/> Allow Rev Rec Job GT Override
General Journal Entry Creation	<input type="checkbox"/> Restrict Quote Transfer (All)	<input type="checkbox"/> Allow Rev Rec GPM Changes
Purchase Order Access	<input type="checkbox"/> Restrict Transfers (Credit Issues)	<input type="checkbox"/> Allow Rev Rec Overhead Changes
DocuSign Requests	<input checked="" type="checkbox"/> Restrict Sale Access (SP) 	<input checked="" type="checkbox"/> Allow Budget Adjustments
Dashboard Access	<input type="checkbox"/> Restrict Sale Access (Branch)	<input checked="" type="checkbox"/> Allow Contract Adjustments
Dashboard on Login	<input type="checkbox"/> Restrict Customer Creation	
Dashboard	<input type="checkbox"/> Restrict Community Deletion	
	<input type="checkbox"/> Restrict Cust. Accounting Access	
	<input type="checkbox"/> Restrict Sale Date Change	
	<input type="checkbox"/> Restrict Inv Access (Warehouse)	

WO Accepted	Comm Paid	Received
Received	Closed	Received
Scheduled	Paid	Received
Delivered	Job Start Confirmed	Received
Install Complete		Received
Rev Rec: <input type="radio"/> % Comp. <input type="radio"/> Comp. Contract <input checked="" type="radio"/> All		Received
Store: <input type="text"/>		Received
Sales Person: No Access 		Received
Line of Business: <input type="text"/>		Received
Written Date Range: <input type="text"/> to <input type="text"/>		Received
Job Start Date Range: <input type="text"/> to <input type="text"/>		Received
Job Close Date Range: <input type="text"/> to <input type="text"/>		Received
Paid Date Range: <input type="text"/> to <input type="text"/>		Received
Budget: <input type="text"/>		Received
Save current filter:		Received
Filter Name: <input type="text"/> Save <input type="button" value="Save"/>		Received
Load a saved user filter:		Received
Select a filter: <input type="text"/>		Received
Load Month-End filter:		Received
Select a filter: <input type="text"/>		Received

Default Filtered Settings

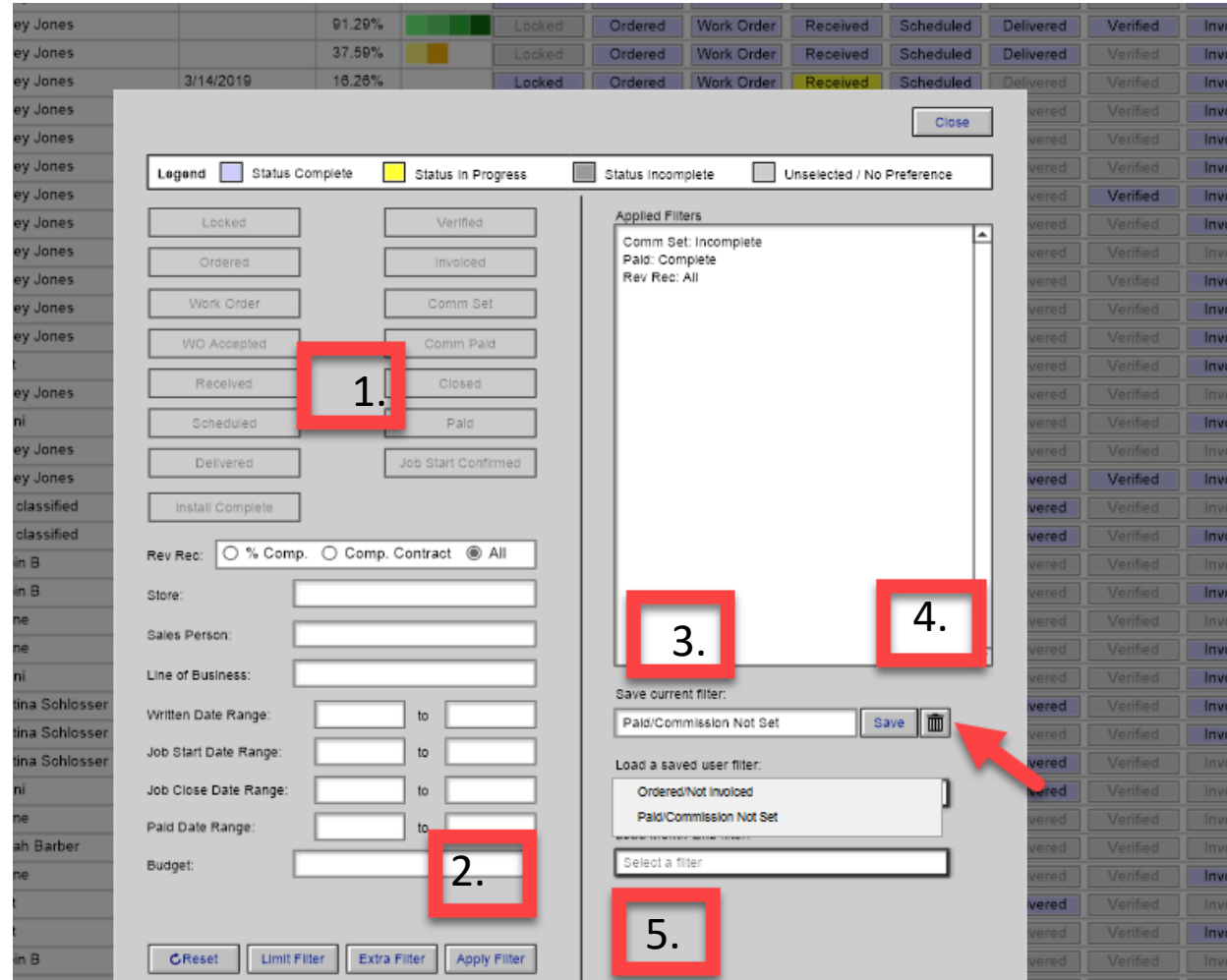
- Not Delivered and Open
- Delivered, No WO and Open
- Delivered, WO not Accepted, and Open
- Delivered, Not Invoiced and Open
- Previously referred to as Super 4 Reports



The screenshot shows a software interface with a filter dialog box. The dialog box has a legend with four categories: Status Complete (blue), Status In Progress (yellow), Status Incomplete (grey), and Unselected / No Preference (white). Below the legend is a grid of buttons representing various job statuses: Locked, Verified, Ordered, Invoiced, Work Order, Comm Set, WO Accepted, Comm Paid, Received, Closed, Scheduled, Paid, Delivered, and Job Start Confirmed. There is also an 'Install Complete' button. Below the grid are several input fields: Rev Rec (radio buttons for % Comp, Comp. Contract, All), Store, Sales Person, Line of Business, Written Date Range, Job Start Date Range, Job Close Date Range, Paid Date Range, and Budget. At the bottom of the dialog are buttons for 'Reset', 'Limit Filter', 'Extra Filter', and 'Apply Filter'. On the right side of the dialog, there is a section for 'Applied Filters' with a search box and a list of filters. A red arrow points to the 'Applied Filters' list, which contains the following items: 'Not Delivered and Open', 'Delivered, No WO and Open', 'Delivered, WO Not Accepted and Open', and 'Delivered, Not Invoiced and Open'. The background of the software interface shows a table with columns for Job Name, Job Description, Sales Person, Start Date, GPM, and Budget, and rows of job data.

Setting Saved Filters

1. Choose Filters
2. Apply the Filters
3. Name Filter
4. Use Save
5. Previously Saved Filters
6. Use the Trash Can to Delete Unwanted Saved Filters



Next Up: Afternoon Refreshments 2:30 – 2:50 pm

Followed by: Breakout #7
2:50 – 3:35 pm

- Warehouse Management Best Practices – Griffin Ballroom
- Flooring Financial – Belle Meade Room
- FloorRight in 3D – Arlington Room