SFG NEXUS - Microsoft Planner Workflow Mapping

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Overview

This document maps the top 10 critical workflows from the SFG NEXUS application to Microsoft Planner tasks, providing detailed configuration for automated task creation, assignment, and tracking.

Planner Board Structure

Recommended Plan Name

"SFG Operations Hub"

Buckets Configuration

Bucket Name	Purpose	Auto-Assign Rule	Typical Task Count
1. Sales Pipeline	New enquiries and quote preparation	Sales Team	10-30
2. Pending Approvals	Items requiring approval	Value-based routing	5-15
3. Customer Actions	Waiting for customer input/docs	Customer (external)	8-20
4. Technical Review	Technical and spec reviews	Technical Team (Tier2)	5-10
5. Production Planning	Materials and fabrication prep	Production Team (Tier3)	10-20
6. Procurement	Purchase order management	Operations + Finance	5-15
7. Fabrication	Active manufacturing work	Lead Fabricator	8-15
8. Installation Planning	Scheduling and logistics	Installation Manager	5-12
9. Quality & Completion	Final checks and close-out	Quality Team	3-8
10. Completed	Archive of finished tasks	N/A	Archive

Top 10 Workflow Mappings

1. New Enquiry Response

Workflow Description: Initial customer enquiry received, requires immediate response

Planner Task Configuration:
- **Task Title:** `Respond to Enquiry #{enquiryNumber} - {customerName}`
- **Bucket:** Sales Pipeline
- **Owner:** Sales Team (auto-assign to next available)
- **Priority:** High
- **Due Date:** `Creation DateTime + 2 hours (business hours)`
- **Start Date:** Creation DateTime

Task Description Template:

```
   NEW ENQUIRY ALERT

Customer: {customerName}
Contact: {contactName}
Email: {email}
Phone: {phone}
Company: {company}
Project: {projectName}
Description: {description}

  SLA TARGETS:
- Initial Response: 2 hours ⚠
- Full Assessment: 24 hours
- Quote Delivery: 7 days

  REQUIRED ACTIONS:
See checklist below
```

Checklist Items:

- [ ] Acknowledge receipt via email/phone (2 hour SLA)

- [ ] Log enquiry in system with all details

- [ ] Assess project requirements and complexity

- [ ] Determine if survey required

- [ ] Schedule survey if needed (Free for Manchester < £2k)

- [ ] Prepare initial quote estimate

- [ ] Send quote to customer (7 day SLA)

- [ ] Log quote number and link to enquiry

- [ ] Set follow-up reminder for 3 days

Automation Triggers:

- **Create:** When new record added to "Enquiries" SharePoint list

- **Reminder:** 1 hour before 2-hour SLA expires

- **Escalate:** If 24 hours pass with no response, notify Sales Manager

- **Complete:** When quote sent and logged

Labels/Tags:

- Survey Required (if applicable)

- High Value (if estimated > £10k)

- Manchester Local (if M-prefix postcode)

2. Quote Approval

Workflow Description: Quote prepared and requires approval before sending to customer

Planner Task Configuration:

- **Task Title:** `Approve Quote {quoteNumber} - {customerName} - £{value}`

- **Bucket:** Pending Approvals

- **Owner:** Auto-assigned based on value:

- < £5k: Self-approve (no task if canSelfApprove)

- £5k-£10k: Sales Manager

- £10k-£50k: Sales Manager + Finance Manager

- > £50k: Sales Manager + Finance Manager + CEO

- **Priority:** High
- **Due Date:** `Creation DateTime + 1 business day`
- **Start Date:** Creation DateTime

Task Description Template:

```
  QUOTE APPROVAL REQUEST

Quote: {quoteNumber} (Revision {revision})
Customer: {customerName}
Project: {projectName}
Product Type: {productType}
Quote Type: {quoteType}

  FINANCIAL DETAILS:
Base Value: £{baseValue}
Markup: {markup}%
Net Value: £{netValue}
VAT (20%): £{vatAmount}
Gross Value: £{grossValue}

  PROJECT DETAILS:
Complexity: {projectComplexity}
Timeline: {estimatedTimelineWeeks} weeks
Survey Required: {requiresSurvey}
Quoted By: {quotedBy}

  APPROVAL REQUIREMENTS:
{approvalRequirementsList}

  REVIEW CHECKLIST:
See checklist below
```

Checklist Items:
- [ ] Review quote value and pricing accuracy
- [ ] Verify markup percentage appropriate for project type
- [ ] Check customer credit status and history
- [ ] Confirm project complexity assessment
- [ ] Review survey requirements and costs
- [ ] Verify technical feasibility
- [ ] Check competitor pricing (if available)
- [ ] **APPROVE** or **REJECT** with detailed notes

Automation Triggers:
- **Create:** When quote status = "Pending Approval"
- **Assign:** Route to appropriate approver(s) based on value
- **Reminder:** Daily reminder if pending > 1 day
- **Escalate:** If pending > 3 days, notify next level manager
- **Complete:** When quote approval status = "Approved" or "Rejected"
- **Next Action:** If approved, move to "Send Quote" task

Labels/Tags:
- Awaiting First Approval
- Awaiting Second Approval (if dual approval required)

- High Value (> £10k)
- Complex Project
- Self-Approve Eligible (< £5k simple)

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3. Quote to Job Conversion

Workflow Description: Quote won, needs conversion to job and customer PO tracking

Planner Task Configuration:
- **Task Title:** `Convert Quote {quoteNumber} to Job - Await PO from {customerName}`
- **Bucket:** Active Jobs
- **Owner:** Operations Team
- **Priority:** High
- **Due Date:** `Quote Won Date + 14 days`
- **Start Date:** Quote Won Date

Task Description Template:

```
   QUOTE WON - CONVERSION TO JOB

Quote: {quoteNumber} (Revision {revision})
Customer: {customerName}
Project: {projectName}
Value: £{value}
Quote Date: {quoteDate}
Won Date: {wonDate}

⚠ AWAITING CUSTOMER PO
Due Date: {wonDate + 14 days}
Escalation: {wonDate + 21 days}

   CUSTOMER CONTACT:
Contact Name: {contactName}
Email: {email}
Phone: {phone}

   CONVERSION STEPS:
See checklist below
```

Checklist Items:
- [ ] Verify quote approval status = APPROVED
- [ ] Send "Quote Accepted" confirmation email to customer
- [ ] Request Purchase Order from customer
- [ ] Follow up after 7 days if no PO received
- [ ] Follow up after 14 days (urgent)
- [ ] **Escalate to Sales Manager** if PO not received by day 21
- [ ] Upon PO receipt: Record PO number and date in system
- [ ] Auto-create Job record with job number
- [ ] Link job to original quote
- [ ] Initiate Drawing Approval workflow (auto-create task)
- [ ] Notify Operations and Production teams
- [ ] Close this task and archive

Automation Triggers:

- **Create:** When quote status changes to "WON"
- **Reminder:** Day 7, 14 (gentle reminder to customer)
- **Escalate:** Day 21 if no PO received, notify Sales Manager
- **Complete:** When `poReceivedDate` is populated
- **Next Action:** Auto-create "Drawing Approval - Customer Upload" task

Labels/Tags:

- Awaiting PO
- PO Received (when applicable)
- Escalated (if day 21 passed)

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4. Drawing Approval - Customer Upload

Workflow Description: Customer needs to upload approved drawings for technical review

Planner Task Configuration:

- **Task Title:** `Drawing Upload Required - Job {jobNumber} - {customerName}`
- **Bucket:** Customer Actions
- **Owner:** Customer (external) + Sales Rep (facilitator)
- **Priority:** High
- **Due Date:** `Job Creation Date + 7 days`
- **Start Date:** Job Creation Date

Task Description Template:

```
☐ DRAWING UPLOAD REQUEST

Job: {jobNumber}
Customer: {customerName}
Project: {projectName}
PO: {orderNumber}
PO Date: {poReceivedDate}

☐ DRAWING REQUIREMENTS:
- Upload approved architectural/technical drawings
- Specify drawing type (Floor Plan, Elevation, Detail, etc.)
- Include version/revision number
- Add any special notes or requirements

☐ DUE DATE: {jobCreationDate + 7 days}
⚠ This is the first step in a 16-day drawing approval process

☐ CUSTOMER CONTACT:
{contactName} - {email} - {phone}

☐ UPLOAD PROCESS:
See checklist below
```

Checklist Items:

- [ ] Customer notified of drawing upload requirement
- [ ] Reminder sent at day 3 (if no upload)
- [ ] Reminder sent at day 5 (if no upload)

- [ ] Follow-up call at day 7 (if no upload)

- [ ] Drawing file(s) uploaded to portal

- [ ] Drawing type specified

- [ ] Version/revision number recorded

- [ ] Customer notes and requirements captured

- [ ] Automatic progression to "Customer Approval" stage

Automation Triggers:

- **Create:** When job created and `poReceivedDate` populated

- **Reminder:** Day 3, 5, 7 if no drawing uploaded

- **Complete:** When drawing file uploaded (status = "UPLOADED")

- **Next Action:** Auto-create "Drawing Approval - Customer Review" task

Labels/Tags:

- Awaiting Drawing

- Drawing Uploaded

- Late Upload (> 7 days)

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5. Drawing Approval - Technical Review

Workflow Description: Technical team reviews drawing for feasibility and specifications

Planner Task Configuration:

- **Task Title:** `Technical Review - Job {jobNumber} - {customerName}`

- **Bucket:** Technical Review

- **Owner:** Technical Team (Tier2) - Auto-assign to next available

- **Priority:** High

- **Due Date:** `Customer Approval Date + 2 days`

- **Start Date:** Customer Approval Date

Task Description Template:

```
   TECHNICAL DRAWING REVIEW


Job: {jobNumber}
Customer: {customerName}
Project: {projectName}
Drawing: {drawingName} v{drawingVersion}

   CUSTOMER APPROVED: {customerApprovedAt}
   AWAITING TECHNICAL REVIEW

   SLA: 2 business days
⚠ Stage 3 of 7 in drawing approval workflow

   REVIEW REQUIREMENTS:
- Technical feasibility assessment
- Specification verification
- Measurement accuracy check
- Material compatibility review
- Fabrication complexity assessment
- Lead time estimation

   REVIEW STEPS:
See checklist below
```

Checklist Items:

- [ ] Download and review drawing file

- [ ] Verify technical feasibility of design

- [ ] Check all specifications against standards

- [ ] Verify all measurements and dimensions

- [ ] Assess material requirements and availability

- [ ] Confirm fabrication capability

- [ ] Estimate fabrication complexity and timeline

- [ ] Document any concerns or required clarifications

- [ ] **APPROVE** or **REJECT** with detailed notes

- [ ] If rejected: Specify required changes and return to customer

- [ ] If approved: Progress to Production Review stage

Automation Triggers:

- **Create:** When drawing status = "CUSTOMER_APPROVED"

- **Reminder:** Day 1 (halfway through 2-day SLA)

- **Escalate:** If exceeds 2 days, notify Technical Manager

- **Complete:** When `technicalReviewed = true`

- **Next Action:** Auto-create "Drawing Approval - Production Review" task

Labels/Tags:

- In Review

- Approved

- Rejected (if applicable)

- Requires Clarification

6. Materials Analysis and Costing

Workflow Description: Production team extracts materials from drawing and calculates costs

Planner Task Configuration:
- **Task Title:** `Materials Analysis - Job {jobNumber} - {customerName}`
- **Bucket:** Production Planning
- **Owner:** Production Team (Tier3)
- **Priority:** High
- **Due Date:** `Final Drawing Approval Date + 2 days`
- **Start Date:** Final Drawing Approval Date

Task Description Template:

```
  MATERIALS ANALYSIS & COSTING

Job: {jobNumber}
Customer: {customerName}
Project: {projectName}
Drawing: {drawingName} v{drawingVersion}

  DRAWING FULLY APPROVED: {finalApprovedAt}

  ANALYSIS REQUIREMENTS:
- Extract all material requirements from drawing
- Calculate quantities and dimensions
- Match materials to supplier catalog
- Verify stock availability
- Calculate total material costs
- Estimate lead times
- Generate supplier recommendations

  SLA: 2 business days

  ANALYSIS STEPS:
See checklist below
```

Checklist Items:
- [ ] Review approved drawing and cutting list
- [ ] Extract all material line items (glass, aluminum, hardware, etc.)
- [ ] Calculate precise quantities for each material
- [ ] Verify specifications match drawing requirements
- [ ] Match materials to preferred supplier catalog
- [ ] Check current stock availability
- [ ] Get pricing quotes from suppliers (if not in system)
- [ ] Calculate total materials cost with breakdown
- [ ] Estimate delivery lead times for each item
- [ ] Document supplier recommendations with justification
- [ ] Generate materials analysis report
- [ ] **Submit for approval**
- [ ] Progress to Purchase Order creation

Automation Triggers:
- **Create:** When drawing `finalApproved = true`

- **Reminder:** Day 1 (halfway through SLA)
- **Escalate:** If exceeds 2 days, notify Production Manager
- **Complete:** When `materialsExtracted = true` and `costAnalyzed = true`
- **Next Action:** Auto-create "Purchase Order Creation" task(s) for each supplier

Labels/Tags:
- Analysis In Progress
- Awaiting Supplier Quotes
- Analysis Complete
- High Material Cost (> £5k)

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7. Purchase Order Creation and Submission

Workflow Description: Operations creates purchase orders from materials analysis

Planner Task Configuration:
- **Task Title:** `Create Purchase Order - Job {jobNumber} - {supplierName}`
- **Bucket:** Procurement
- **Owner:** Operations Team (Tier1/3)
- **Priority:** Medium-High (High if urgent project)
- **Due Date:** `Materials Analysis Complete Date + 1 day`
- **Start Date:** Materials Analysis Complete Date

Task Description Template:

```
  PURCHASE ORDER CREATION

Job: {jobNumber}
Customer: {customerName}
Supplier: {supplierName}

  MATERIALS ANALYSIS COMPLETE
Analysis ID: {analysisId}
Total Materials Cost: £{totalMaterialsCost}
Estimated Lead Time: {estimatedLeadTime} days

  ORDER DETAILS:
- Generate PO number: Auto (PO{year}-{sequence})
- Select order items from analysis
- Verify supplier details and contact
- Calculate order totals (subtotal, VAT, total)
- Set required delivery date
- Add delivery instructions

⚠ APPROVAL REQUIRED:
{approvalRequirementBasedOnValue}

  ORDER CREATION STEPS:
See checklist below
```

Checklist Items:
- [ ] Review materials analysis and approved items
- [ ] Verify supplier is active and preferred

- [ ] Generate unique PO number
- [ ] Add all order items with quantities and specs
- [ ] Verify unit prices against supplier catalog
- [ ] Calculate subtotal, VAT (20%), and total
- [ ] Set required delivery date (based on job timeline)
- [ ] Add delivery address (if not standard)
- [ ] Add special delivery instructions (if any)
- [ ] Save PO in DRAFT status
- [ ] **Submit for approval** (auto-route based on value)
- [ ] If < £100: Single approval
- [ ] If £100-£500: Ops + Finance approval
- [ ] If > £500: Finance team mandatory approval

Automation Triggers:
- **Create:** When materials analysis approved
- **Complete:** When PO status = "SUBMITTED_FOR_APPROVAL"
- **Next Action:** Auto-create "Purchase Order Approval" task(s)

Labels/Tags:
- Draft PO
- Submitted for Approval
- Urgent Order (if job priority = HIGH)

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8. Purchase Order Approval

Workflow Description: PO requires approval based on value thresholds before sending to supplier

Planner Task Configuration:
- **Task Title:** `Approve PO {orderNumber} - {supplierName} - £{orderValue}`
- **Bucket:** Pending Approvals
- **Owner:** Auto-assigned based on value:
- < £100: Any Operations staff
- £100-£500: First approval (Ops), Second approval (Finance)
- > £500: Finance Team (mandatory)
- **Priority:** High
- **Due Date:** `PO Submission Date + 1 business day`
- **Start Date:** PO Submission Date

Task Description Template:

```
   PURCHASE ORDER APPROVAL


PO Number: {orderNumber}
Job: {jobNumber}
Customer: {customerName}
Supplier: {supplierName}

   ORDER VALUE: £{orderValue}

   ORDER DETAILS:
Order Date: {orderDate}
Required Date: {requiredDate}
Delivery Address: {deliveryAddress}
Payment Terms: {paymentTerms}

   ORDER ITEMS:
{itemizedListWithPrices}

   COST BREAKDOWN:
Subtotal: £{subtotal}
VAT (20%): £{vatAmount}
**TOTAL: £{totalAmount}**

   APPROVAL REQUIREMENTS:
{approvalRequirementsList}

⚠ APPROVAL RULES:
- Under £100: Single approval (can auto-approve)
- £100-£500: Two approvals required (Ops + Finance)
- Over £500: Finance team mandatory approval

   APPROVAL STEPS:
See checklist below
```

Checklist Items:

- [ ] Review PO value and verify calculations
- [ ] Verify supplier details and payment terms
- [ ] Check order items match materials analysis
- [ ] Verify required delivery date is realistic
- [ ] Confirm budget availability for this job
- [ ] Review supplier performance history (if available)
- [ ] **First Approval** (Operations) - if value >= £100
- [ ] **Second Approval** (Finance) - if value >= £100
- [ ] **Override Approval** - if value < £100 (single approval only)
- [ ] Auto-send email to supplier after full approval
- [ ] Update PO status to "SENT_TO_SUPPLIER"
- [ ] Create MS Teams notification confirming approval
- [ ] Close approval task

Automation Triggers:
- **Create:** When PO `requiresApproval = true` and status = "SUBMITTED"
- **Assign:** Auto-route based on order value thresholds
- **Reminder:** Daily if pending > 1 day
- **Escalate:** If pending > 2 days, notify Finance Manager

- **Complete:** When `approved = true`
- **Next Action:** Auto-send supplier email, create activity log

Labels/Tags:
- Awaiting First Approval
- Awaiting Second Approval (if applicable)
- Finance Approval Required (if > £500)
- Approved & Sent

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9. Fabrication Workflow Execution

Workflow Description: Production team fabricates the job based on approved drawings and materials

Planner Task Configuration:
- **Task Title:** `Fabricate Job {jobNumber} - {customerName}`
- **Bucket:** Fabrication
- **Owner:** Lead Fabricator (assigned)
- **Priority:** Based on job priority (HIGH/MEDIUM/LOW)
- **Due Date:** `Fabrication Start Date + {estimatedDays} days`
- **Start Date:** Fabrication Start Date (when materials received)

Task Description Template:

```
☐ FABRICATION WORKFLOW

Job: {jobNumber}
Customer: {customerName}
Project: {projectName}

☐ JOB DETAILS:
Product Type: {productType}
Estimated Days: {estimatedDays}
Lead Fabricator: {leadFabricatorName}
Helper Assigned: {helperAssigned}

☐ DRAWING: {drawingName} v{drawingVersion}
☐ MATERIALS: All materials received and verified

☐ FABRICATION STAGES:
1. Drawing Review & Cutting List
2. Material Cutting
3. Component Preparation
4. Powder Coating (if required)
5. Assembly
6. Quality Check
7. Prepare for Installation

☐ ESTIMATED HOURS:
Without Helper: {estimatedHours} hours
With Helper: {estimatedHoursWithHelper} hours
Current Assignment: {assignmentType}

☐ FABRICATION STEPS:
See checklist below
```

Checklist Items:
- [ ] **Stage 1: Review drawings and cutting list** (Verify all dimensions)
- [ ] **Stage 2: Cut materials** (Cut glass, aluminum, frames)
- [ ] **Stage 3: Prepare components** (Clean, deburr, prep surfaces)
- [ ] **Stage 4: Powder coating** (If required, requires 2 operatives)
- [ ] **Stage 5: Assembly** (Assemble all components)
- [ ] **Stage 6: Quality check** (Primary checker + Secondary checker)
- [ ] Verify all dimensions match drawing
- [ ] Check glass quality and edges
- [ ] Test all moving parts (if applicable)
- [ ] Verify powder coating quality (if applicable)
- [ ] **Stage 7: Prepare for installation** (Package, label, load)
- [ ] Document any issues or deviations
- [ ] **Mark fabrication complete**
- [ ] Notify Installation Manager
- [ ] Progress to Installation Scheduling

Automation Triggers:
- **Create:** When all materials received and job status = "FABRICATION"
- **Assign:** Auto-assign to Lead Fabricator from schedule
- **Reminder:** Daily progress update required
- **Complete:** When all stages marked complete and quality checked
- **Next Action:** Auto-create "Installation Scheduling" task

Labels/Tags:
- In Fabrication
- Quality Check Pending
- Quality Check Passed/Failed
- Fabrication Complete
- Urgent Job (if priority = HIGH)

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10. Installation Scheduling and Execution

Workflow Description: Schedule and execute final installation at customer site

Planner Task Configuration:
- **Task Title:** `Schedule & Install - Job {jobNumber} - {customerName}`
- **Bucket:** Installation Planning
- **Owner:** Installation Manager
- **Priority:** Based on job priority + customer urgency
- **Due Date:** `Fabrication Complete Date + 7 days`
- **Start Date:** Fabrication Complete Date

Task Description Template:

```
   INSTALLATION SCHEDULING

Job: {jobNumber}
Customer: {customerName}
Site Address: {installationAddress}
Distance from Base: {distanceFromBase} miles

   JOB DETAILS:
Product Type: {productType}
Fabrication Complete: {fabricationCompletedDate}
Estimated Installation Time: {installationTime} hours

⚖ GLASS WEIGHT & STAFFING:
Total Glass Weight: {totalGlassWeight} kg
Max Panel Weight: {maxPanelWeight} kg
Recommended Staff: {recommendedStaff}
Requires Mechanical Aid: {requiresMechanicalAid}
{mechanicalAidType}

   SAFETY REQUIREMENTS:
Lifting Method: {liftingMethod}
Labor Complexity: {laborComplexity}
Safety Alerts: {safetyAlerts}
Access Requirements: {accessRequirements}

   INSTALLATION STEPS:
See checklist below
```

Checklist Items:
- [ ] **Coordinate with customer** for installation date/time
- [ ] **Assign installation team** (based on glass weight and complexity)
- [ ] **Assign van** (based on product size and team)
- [ ] **Schedule date** (confirm with customer)
- [ ] **Confirm access requirements** (parking, site access, keys)
- [ ] **Safety briefing** for installation team
- [ ] Verify mechanical aids available (if required)
- [ ] Load van with fabricated product
- [ ] Conduct pre-departure safety check
- [ ] **Travel to site**
- [ ] **Execute installation** (follow safety protocols)
- [ ] Conduct on-site quality check
- [ ] **Customer sign-off** (completion certificate)
- [ ] Clean up and site restoration
- [ ] Return to base
- [ ] **Mark job complete**
- [ ] Create completion report
- [ ] Archive job

Automation Triggers:
- **Create:** When fabrication complete and quality passed
- **Reminder:** 3 days before scheduled installation
- **Complete:** When installation complete and customer signed off
- **Next Action:** Move to "Quality & Completion" bucket for final review

Labels/Tags:

- Awaiting Schedule
- Scheduled (with date)
- In Progress (during installation)
- Complete - Pending Sign-Off
- Complete - Signed Off
- High Complexity Installation
- Mechanical Aid Required

Planner Automation Rules Summary

Auto-Create Tasks

1. New Enquiry → Create "Respond to Enquiry" task (Bucket: Sales Pipeline)
2. Quote Pending Approval → Create "Approve Quote" task (Bucket: Pending Approvals)
3. Quote Won → Create "Convert to Job" task (Bucket: Active Jobs)
4. Job Created → Create "Drawing Upload" task (Bucket: Customer Actions)
5. Drawing Approved → Create "Technical Review" task (Bucket: Technical Review)
6. Drawing Final Approved → Create "Materials Analysis" task (Bucket: Production Planning)
7. Materials Analysis Complete → Create "Create PO" task (Bucket: Procurement)
8. PO Submitted → Create "Approve PO" task (Bucket: Pending Approvals)
9. Materials Received → Create "Fabrication" task (Bucket: Fabrication)
10. Fabrication Complete → Create "Installation" task (Bucket: Installation Planning)

Auto-Assign Tasks

- **Value-based routing** for Quote and PO approvals
- **Role-based assignment** for Technical, Production, Fabrication teams
- **Workload balancing** for Sales and Installation teams (next available)

Auto-Calculate Due Dates

- Enquiry Response: Creation + 2 hours
- Quote Approval: Creation + 1 day
- Job Conversion: Won Date + 14 days
- Drawing Upload: Job Created + 7 days
- Technical Review: Customer Approval + 2 days
- Materials Analysis: Drawing Approved + 2 days
- PO Approval: Submission + 1 day
- Fabrication: Materials Received + Estimated Days
- Installation: Fabrication Complete + 7 days

Auto-Send Reminders

- **50% of SLA elapsed**: Gentle reminder
- **75% of SLA elapsed**: Urgent reminder
- **100% of SLA elapsed**: Escalation to manager

Auto-Escalate

- Enquiry no response after 24 hours → Sales Manager

• Quote approval pending > 3 days → Next level manager

• PO approval pending > 2 days → Finance Manager

• Drawing stage exceeds SLA by 50% → Project Manager

• Job PO not received after 21 days → Sales Manager

Integration with SharePoint

Data Flow: SharePoint ↔ Planner

New Enquiry

1. Record added to **"Enquiries" SharePoint list**
2. **Power Automate** triggers
3. Create task in **Planner** (Bucket: Sales Pipeline)
4. Assign to Sales Team member (round-robin)
5. Set due date (Creation + 2 hours)
6. Populate task description with enquiry details

Quote Approval

1. Quote status in **"Quotes" list** changes to "Pending Approval"
2. **Power Automate** evaluates quote value
3. Create task in **Planner** (Bucket: Pending Approvals)
4. Assign to appropriate approver(s) based on value threshold
5. Set due date (Creation + 1 day)
6. Populate task with quote financials (Tier1/Tier2 only)

Job Conversion

1. Quote status in **"Quotes" list** changes to "WON"
2. **Power Automate** creates new record in **"Jobs" list**
3. Auto-generate job number (J{year}-{sequence})
4. Link job to original quote
5. Create task in **Planner** (Bucket: Active Jobs)
6. Set due date (Won Date + 14 days for PO)
7. Monitor for PO received date update

PO Approval

1. Record added to **"Supplier Orders" list** with status "SUBMITTED"
2. **Power Automate** evaluates order value
3. Create task in **Planner** (Bucket: Pending Approvals)
4. Route to appropriate approver(s) based on value thresholds
5. Upon approval: Update SharePoint record, send supplier email
6. Complete Planner task

Bi-Directional Sync

• **Task completion in Planner** → Update status in SharePoint list

• **Status change in SharePoint** → Update task progress in Planner

• **Comments in Planner** → Sync to SharePoint "Notes" field

• **Checklist progress** → Update SharePoint workflow columns

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Labels and Tags Strategy

Priority Labels

- **Urgent** - SLA expiring within 4 hours
- **High Priority** - Customer critical or high-value job
- **Medium Priority** - Standard workflow
- **Low Priority** - Non-urgent tasks

Status Labels

- **Pending** - Awaiting action
- **In Progress** - Currently being worked on
- **Complete** - Finished and verified
- **Blocked** - Waiting on external dependency
- ⚠ **Escalated** - Requires management attention

Category Labels

- **High Value** - Quote/Job > £10k
- **Manchester Local** - M-prefix postcode
- **Complex** - High fabrication complexity
- **Safety Critical** - Heavy glass or mechanical aid required
- **Awaiting Drawing** - Customer action required
- **Awaiting PO** - Customer PO not yet received

Reporting and Dashboards

Key Metrics to Track (via Power BI or Planner Analytics)

1. **Average Time to Complete by Bucket** (identify bottlenecks)
2. **Tasks by Due Date** (upcoming deadlines)
3. **Tasks by Owner** (workload balancing)
4. **Overdue Tasks by SLA** (compliance monitoring)
5. **Escalated Tasks** (management attention required)
6. **Completed Tasks by Week** (productivity trends)

Weekly Status Report Template

```
☐ SFG NEXUS WEEKLY STATUS REPORT

Week Ending: {date}

☐ TASKS BY BUCKET:
- Sales Pipeline: {count} tasks
- Pending Approvals: {count} tasks
- Customer Actions: {count} tasks
- Technical Review: {count} tasks
- Production Planning: {count} tasks
- Procurement: {count} tasks
- Fabrication: {count} tasks
- Installation Planning: {count} tasks
- Completed: {count} tasks

⚠ OVERDUE TASKS:
{list of overdue tasks with owners and days overdue}

☐ ESCALATED TASKS:
{list of escalated tasks requiring management attention}

☐ COMPLETION RATE:
Total Created: {count}
Total Completed: {count}
Completion Rate: {percentage}%

☐ TOP BOTTLENECKS:
{identify buckets with longest average completion time}

☐ RECOMMENDATIONS:
{actionable insights based on data}
```

Next Steps

1. **Create "SFG Operations Hub" Plan** in Microsoft Planner
2. **Configure 10 Buckets** as specified above
3. **Build Power Automate Flows** for auto-task creation
4. **Configure SharePoint List Triggers** for workflow automation
5. **Set Up MS Teams Integration** for Planner notifications
6. **Train Team Members** on Planner task management
7. **Monitor and Adjust** bucket structure and automation rules
8. **Generate Weekly Reports** to identify bottlenecks
9. **Optimize Workflows** based on actual performance data

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Next Review: After 2 weeks of live usage