

Using the Follow-Up Tools and Reports You Already Have

How to use the capabilities already available in your DMS, ERP, point-of-sale, CRM, service, accounting, and communication systems — then turn the right reports into working follow-up lists instead of another stack of information.

Start with what you already own

Many business systems already include useful follow-up capabilities. They may not be configured, employees may not know they exist, or the business may have stopped using them over time.

Before adding another tool, look through the Reports, CRM, Customer, Tasks, Activities, Service, Parts, Sales, Orders, Warranty, Rental, and Accounting areas of your current system. Search the help documentation for terms such as *follow-up*, *task*, *reminder*, *activity*, *customer contact*, *communication history*, *open order*, *open quote*, *special order*, *backorder*, *aging*, *status*, and *notification*.

Capability	What to look for	Why it matters
Visibility	Open-item reports, aging reports, status lists, customer-order lists	Shows what is still open or may need attention.
Follow-up management	Tasks, reminders, assigned activities, due dates, notes, owners	Turns an open item into a clear responsibility and next action.
Customer communication	Email and text tools, contact history, templates, service reminders	Helps you communicate consistently and preserve what happened.

If the system can give you visibility, help assign a next action, and preserve customer communication, it may already be able to support a strong follow-up process. Learn how to use what is available before assuming another application is necessary. The goal is not to collect tools. It is to manage open commitments reliably.

Use this guide as a menu, not a checklist. Start with two or three report areas where follow-up is most likely to fall through the cracks, build the habit there, and expand only when the process is working.

How to turn a report into a working follow-up list

WORKING A REPORT

DEFINE → FILTER → ORDER → READ → ACT → CLOSE → LEARN

- 1 **Define.** Start with the management question. Are you looking for customers waiting on you, missed promises, work that has stopped moving, open orders without a completion plan, or something else? The question determines the filter.
- 2 **Filter.** Decide what belongs in today's working list. Include records where someone needs to act, check, communicate, decide, or intervene. Leave out records that have a clear owner, a known next step, and a future review date that has not arrived.
- 3 **Order.** Once the list is narrowed, put the most important exceptions near the top. Missed customer commitments and delays you control usually come before simple age.
- 4 **Read.** Read across the useful fields. One column rarely tells the whole story. Order date, promised date, last activity, status, assigned employee, dollars, and customer communication often matter together.
- 5 **Act.** Put the item back under control. Make the status clear, assign an owner, define the next action, and set the review date. Record the decision somewhere dependable.
- 6 **Close.** When the item is finished, close it with a useful outcome so the active list stays clean.
- 7 **Learn.** If the same type of item keeps returning, ask whether the underlying process needs improvement rather than another reminder.

Do not work a report from top to bottom just because that is the order the system printed it in. Define the question, filter the list, then order the remaining exceptions by what deserves attention.

What keeps an open item under control

Once a report identifies something worth managing, preserve four pieces of information so it does not fall back into memory.

STATUS	OWNER	NEXT ACTION	REVIEW DATE
Where is it now, and what are we waiting on?	Who is responsible for making sure it moves?	What exactly needs to happen next?	When will we act or look again if nothing changes?

When there is a promised or expected event — a part arrival, an approval, a delivery, a payment, a manufacturer response, or a customer decision — record that date separately from the review date.

What “leave out” means

Leaving an item out of today's follow-up view does not mean deleting it, closing it, or forgetting it. The record remains in the operating system and should return to the review when its next date arrives or when something changes.

For example, a 26-day-old work order waiting on a factory backorder may be under control if the customer was updated yesterday, the part has a known ETA, and the next review is already scheduled. A six-day-old work order may deserve attention first if diagnosis was completed four days ago and nobody has contacted the customer for authorization.

Open and under control is different from open and needing intervention.

Make handoffs explicit

Many follow-up failures happen between departments. A note, email, or verbal message is not enough by itself. A handoff is complete when the next owner is clear, the open commitment is visible to that person, and the status, next action, and review date move with it.

Use saved views when your system allows it

If your system allows saved filters, favorites, scheduled reports, email delivery, alerts, or dashboards, use them. A manager should not have to rebuild the same filter every morning.

- Follow-Up — Waiting on Us
- Follow-Up — Due / Overdue
- Follow-Up — No Recent Activity
- Open Orders — Promised Date Passed
- Open Orders — Product Available / Not Completed
- Service — Jobs Not Moving
- Parts — Received / Customer Not Contacted
- Warranty — Dealer Action Required

Start with the symptom, not the list

You are not meant to set up all twelve. Find the line below that describes what is actually going wrong in your business, and start with those sections. Add another only once the first is working.

If this is what is happening	Start with
Customers call asking where their unit or repair stands	3, 5
You have collected money but units are not going out the door	1, 10

If this is what is happening	Start with
Parts arrive and stay on the shelf	6, 7
Quotes stall and nobody knows why	2
Repairs stall waiting on a customer decision	4
Warranty credits are late or missing	8
Promises get made and never recorded anywhere	9
Accounting keeps chasing the same accounts every month	11
Equipment does not come back when it should	12

Report-by-report setup guide

Twelve report areas follow. The exact fields and report names will vary by system — use the closest available field or view rather than looking for an exact match to the names below.

1 Open Sales Orders / Uncompleted Orders

Open sales orders are not the same as quotes. The customer may already have committed money, product, or a delivery expectation to the transaction.

INCLUDE	Sales orders that are still open and not fully invoiced or completed — especially orders with deposits or payments, allocated or ordered product, promised pickup or delivery dates, partially filled lines, or outstanding actions on your side.
LEAVE OUT OF TODAY'S VIEW	Orders that have a clear owner, a known next step, an informed customer, and a future action or review date that has not arrived. Do not close or remove them from the operating report.
ORDER THE REMAINING LIST BY	1) Promised pickup or delivery date missed; 2) customer waiting on you; 3) deposit or payment on file with no clear next step; 4) product available but order not completed; 5) longest time since meaningful activity; 6) order age or value as context.
READ ACROSS THESE FIELDS	Order date + customer + order value + deposit/payment + product availability/status + promised date + last meaningful activity + assigned employee + balance due.
REVIEW FOR	Orders that should be moving toward completion but are stalled; customers who may be waiting for product or information; paid or deposit orders without a completion plan; product allocated but not delivered; partially filled orders; orders that may simply need to be completed or closed correctly.
TYPICAL NEXT ACTIONS	Schedule delivery or pickup, finish setup or paperwork, check financing/title/trade status, contact the customer, resolve backordered lines, assign the next owner and date, or close and correct the order when appropriate.

2 Open Quotes / Outstanding Estimates

INCLUDE	Open quotes that still represent an active opportunity or customer decision.
LEAVE OUT OF TODAY'S VIEW	Sold, declined, canceled, expired, or closed items, and active quotes with a future follow-up already scheduled and nothing due yet.
ORDER THE REMAINING LIST BY	1) Promised follow-up overdue; 2) follow-up due today; 3) no next follow-up date; 4) oldest last-contact date; 5) quote value or customer impact as context.
READ ACROSS THESE FIELDS	Quote date + quote value + customer + assigned salesperson + last contact or activity + next follow-up date + status/outcome notes.
REVIEW FOR	Customers who need attention now; meaningful opportunities with no clear next step; quotes that have stalled; commitments the salesperson made but has not completed.
TYPICAL NEXT ACTIONS	Contact the customer, clarify decision or timing, update the quote, set the next follow-up, mark postponed/declined/sold, or close stale items after reasonable attempts.

3 Open Work Orders / Work Order Aging

INCLUDE	Open jobs that require monitoring because a promised date is due or past, you hold the next step, there has been no meaningful activity, the job has spent too long in one status, or the reason for waiting is unclear.
LEAVE OUT OF TODAY'S VIEW	Jobs actively in process on schedule, and jobs waiting on a known outside event with an informed customer and a scheduled review date.
ORDER THE REMAINING LIST BY	1) Promised completion date missed; 2) delay you control; 3) no recent activity; 4) time in the same status; 5) customer impact; 6) age or value as context.
READ ACROSS THESE FIELDS	Open date + current status + time in status + last activity + parts or authorization status + promised date + assigned technician and writer.
REVIEW FOR	Jobs that have stopped moving for reasons inside your control, unclear waiting statuses, and customers who have not been told where their unit stands.
TYPICAL NEXT ACTIONS	Clarify the status, assign the next action and owner, update the customer, escalate a parts or authorization block, or complete and close the job.

4 Awaiting Authorization / Estimates Pending Approval

INCLUDE	Diagnosed jobs or estimates that require customer authorization before work can continue.
LEAVE OUT OF TODAY'S VIEW	Jobs already authorized or declined, and jobs with a future callback or review date that is still on schedule and where the customer has been appropriately contacted.

ORDER THE REMAINING LIST BY	1) Customer not yet contacted; 2) promised callback overdue; 3) longest time waiting for approval; 4) customer or business impact as context.
READ ACROSS THESE FIELDS	Diagnosis or estimate date + customer contact attempts + last contact + estimated repair amount + next callback date + assigned service writer.
REVIEW FOR	Repairs held up because the customer has not been reached, the next contact was missed, or no one owns the next step.
TYPICAL NEXT ACTIONS	Contact the customer, document the attempt, set the next contact date, escalate unusual or high-impact cases, record the authorization or decline, or close if no longer active.

5 Completed Work / Not Picked Up

INCLUDE	Completed units still on site, especially when customer notification is incomplete, pickup was promised and missed, or the unit has remained unusually long after completion.
LEAVE OUT OF TODAY'S VIEW	Units already picked up or closed, and completed jobs with a clear pickup arrangement that is still on schedule.
ORDER THE REMAINING LIST BY	1) Customer not yet notified; 2) promised pickup missed; 3) days since completion; 4) space, value, or customer impact as context.
READ ACROSS THESE FIELDS	Completion date + customer notified date and method + promised pickup date + amount due + storage or space concerns if applicable.
REVIEW FOR	Completed work that still requires customer communication, pickup coordination, payment, or an escalation because it has been open too long.
TYPICAL NEXT ACTIONS	Notify the customer, confirm pickup and payment, schedule delivery if offered, document the contact, set the next review date, or close once picked up.

6 Parts Received / Not Picked Up

INCLUDE	Customer-order parts that have arrived and remain on hand.
LEAVE OUT OF TODAY'S VIEW	Parts already picked up, returned, or canceled, and parts with a clear future pickup arrangement that is still on schedule.
ORDER THE REMAINING LIST BY	1) Customer not yet notified; 2) promised pickup date missed; 3) days since receipt; 4) dollar value, space, or customer importance as context.
READ ACROSS THESE FIELDS	Receipt date + customer + part or order number + customer notification status + last contact + promised pickup + amount due or deposit.

REVIEW FOR	Parts waiting because the communication loop was never closed, pickup arrangements that were missed, and aging customer parts that need another decision.
TYPICAL NEXT ACTIONS	Notify the customer, confirm pickup, set another contact date, determine return or restocking options where appropriate, or close and cancel correctly.

7 Special Orders / Backorders

INCLUDE	Open customer orders that have not been completed, especially expected dates that have passed, orders with no current ETA, and customers who have not received a recent update.
LEAVE OUT OF TODAY'S VIEW	Orders with a confirmed future ETA, a recently informed customer, and a scheduled next review date that has not arrived.
ORDER THE REMAINING LIST BY	1) Promised or expected date missed; 2) no current ETA; 3) longest time since customer update or status check; 4) order age, value, or customer impact as context.
READ ACROSS THESE FIELDS	Order date + vendor or manufacturer + expected/ETA date + current status + last vendor check + last customer update + deposit/payment + next review date.
REVIEW FOR	Orders where the vendor or manufacturer needs another check, the customer needs an update, or an item has arrived but the customer or order has not been completed.
TYPICAL NEXT ACTIONS	Check vendor or manufacturer status, update the ETA, contact the customer even when there is no change, set the next review date, receive and complete the order, or resolve a cancellation or return.

8 Open Warranty Claims / Claims Aging

INCLUDE	Open claims not fully resolved or paid, especially claims requiring documentation or correction on your side, rejected or returned claims, and approved claims where the expected credit or payment has not arrived.
LEAVE OUT OF TODAY'S VIEW	Claims progressing normally with a known future milestone and no action due from you yet.
ORDER THE REMAINING LIST BY	1) Action required on your side; 2) returned or rejected claims needing correction; 3) longest time since status change; 4) dollar value; 5) overall age as context.
READ ACROSS THESE FIELDS	Claim date + current status + last status change + missing documentation or reason code + submitted amount + expected credit/payment + assigned owner.
REVIEW FOR	Claims you can actually move, repeated documentation problems, manufacturer decisions that need follow-up, and credits or payments that are late or missing.
TYPICAL NEXT ACTIONS	Correct and resubmit the claim, gather documents, contact the manufacturer, verify the credit, set the next review date, or close once resolved.

9 Customer Tasks / Activities / Scheduled Follow-Ups

INCLUDE	Open tasks that are overdue, due today, have no owner, have no next-action date, or relate to a customer commitment that needs action.
LEAVE OUT OF TODAY'S VIEW	Completed tasks and future-dated items that are not yet due and have a clear owner and next step.
ORDER THE REMAINING LIST BY	1) Overdue customer commitments; 2) due today; 3) no owner; 4) no next action or date; 5) oldest last activity.
READ ACROSS THESE FIELDS	Due date + customer + related transaction, order, quote, or work order + owner + last activity + next action + communication history.
REVIEW FOR	Promises most likely to fall through the cracks, tasks with unclear ownership, and activities that were recorded but did not create the next step.
TYPICAL NEXT ACTIONS	Complete the customer contact, assign an owner, set the next action and date, record the result, create a follow-on activity, or close with an outcome.

10 Customer / Equipment Orders and Incoming Units

Some systems combine this with Open Sales Orders; others keep incoming or ordered units in a separate screen. Use whichever view shows the customer commitment most clearly.

INCLUDE	Sold, reserved, or on-order units that have not been delivered, especially expected arrivals or promised delivery dates that have passed and customers without a recent update.
LEAVE OUT OF TODAY'S VIEW	Orders with a clear ETA, an informed customer, and a future contact or review date that has not arrived.
ORDER THE REMAINING LIST BY	1) Promised delivery date missed; 2) arrival delay or customer waiting on an update; 3) unit available but delivery not scheduled; 4) days since customer update; 5) customer or value impact.
READ ACROSS THESE FIELDS	Order date + unit or product + deposit/payment + ETA or arrival + setup and accessory status + paperwork, financing, or trade status + promised delivery + last customer update.
REVIEW FOR	Customers waiting for equipment or information; arrived units that are not moving to setup or delivery; orders stalled on accessories, financing, title, trade, or paperwork.
TYPICAL NEXT ACTIONS	Update the customer, complete setup or accessories, finish paperwork or financing, schedule delivery, set the next contact date, or resolve or cancel the order as appropriate.

11 AR Aging / Customer Account Issues

INCLUDE	Past-due balances, disputed invoices, promised payments that have passed, missing paperwork, or account issues where you still owe research or a correction.
LEAVE OUT OF TODAY'S VIEW	Current balances and items already on a documented payment or resolution plan that is still on schedule.
ORDER THE REMAINING LIST BY	1) Missed promised payment or resolution date; 2) action required on your side; 3) largest balances; 4) oldest balances as context.
READ ACROSS THESE FIELDS	Invoice or balance date + amount + customer + dispute or reason + last contact + promised payment date + action needed on your side + assigned owner.
REVIEW FOR	The difference between true collection activity and balances that remain open because you still owe an answer, correction, document, or credit.
TYPICAL NEXT ACTIONS	Contact the customer, research or correct the account, provide paperwork, apply the credit or payment, set the promised payment date, escalate, or close the resolved issue.

12 Rental Reservations / Returns / Holds

INCLUDE	Overdue returns, future reservations at risk, equipment unavailable or damaged, unresolved customer issues, and commitments that could affect the next rental.
LEAVE OUT OF TODAY'S VIEW	Normal future reservations and current rentals proceeding according to plan with no customer or operational issue due today.
ORDER THE REMAINING LIST BY	1) Immediate next-reservation or customer impact; 2) overdue return; 3) customer commitment missed; 4) equipment or repair availability; 5) dollar or operational impact.
READ ACROSS THESE FIELDS	Return due date + next reservation + equipment status + damage or repair hold + customer contact + payment or deposit + assigned employee.
REVIEW FOR	Issues that can disrupt today's or tomorrow's rental commitments, overdue equipment, unresolved damage or payment questions, and items needing customer communication.
TYPICAL NEXT ACTIONS	Contact the customer, adjust the reservation, arrange substitute equipment, inspect or repair the unit, resolve the payment or damage issue, or close the return.

How to read across columns instead of down one column

A useful report review rarely depends on one field. The relationship between fields is often what tells the story.

Report	Do not read only	Read across
Open sales orders	Order age	Order date + deposit/payment + product status + promised date + last activity + owner
Work orders	Open date	Open date + status + time in status + last activity + parts/authorization + promised date
Quotes	Quote date	Quote date + value + last contact + next follow-up + customer timing + owner
Special orders	Order date	Order date + ETA + last vendor check + last customer update + next review
Warranty	Claim age	Status + action required + last change + missing docs + amount + expected credit

Questions to ask your system provider or administrator

- Can we assign a task or follow-up directly from a quote, sales order, work order, customer record, claim, or special order?
- Can we record a next-action date and a separate expected date?
- Can a manager see open, due, overdue, or unassigned tasks across employees or departments?
- Can we save custom filters or views and schedule them to run automatically?
- Can we see the last meaningful activity or status change?
- Can we see who recorded a note or contact, not only who was logged in when it was saved?
- Can the system send or queue customer email and text messages and preserve communication history?
- Can we create service reminders or customer communication triggered by an event?
- Can we record the customer's preferred communication method and applicable permissions?
- Can we close items with an outcome or reason so we can learn from patterns later?
- Can we export the report if the system does not support the management view we need?

Automation: useful when it supports the relationship

Automatic communication can be very helpful for routine, predictable messages: appointment confirmations, service reminders, parts-arrival notices, or simple status notifications. It can make communication more dependable and take repetitive work off the team.

Use more judgment for situations that are important, unusual, emotional, high-value, or commercially sensitive. A customer with a serious service problem may need a person, not only a system-generated message.

Whatever tools you use, follow the communication permissions, provider guidance, and requirements that apply to email, text, or other customer communication channels.

A practical 30-day implementation approach

- 1 **Week 1 — Inventory the tools.** Identify available reports, tasks, reminders, communication features, saved views, and scheduled reports in the systems you already use.
- 2 **Week 1 — Draw a line under the backlog.** The first filter you run will return years of open items. Pick a date, roughly ninety days back. Everything newer enters the new process; everything older is closed in one pass — after pulling out anything with a deposit, payment, or customer property attached, and anything where a customer is plainly still waiting. Working the old pile will exhaust the team before the habit takes hold.
- 3 **Week 2 — Choose two or three lists.** For example Open Sales Orders, Open Work Orders, and Parts Received / Not Picked Up. Define what belongs in today's working list and what is under control.
- 4 **Week 3 — Start the huddle.** Use the five questions, close every discussion with status, owner, next action, and review date, and keep the meeting short.
- 5 **Week 4 — Review the pattern.** Look at what became overdue, where work repeatedly stalled, which reports were useful, which filters need adjustment, and what process should be improved upstream.

A simple place to start tomorrow morning

- Run Open Sales Orders and identify orders with deposits or payments, missed promised dates, product available but not completed, or no recent activity.
- Run Open Work Orders and identify jobs where you owe the next action, a promise is overdue, or there has been no meaningful movement.
- Run Parts Received / Not Picked Up and identify customers who have not been notified or pickup commitments that were missed.
- For every item you keep on the working list, make the status clear and assign an owner, next action, and review date.

Do not work a report from top to bottom just because that is the order the system printed it in. Filter it to answer the question you are trying to manage.

This guide is designed to work with the systems your business already uses. The companion **ProfitEdge Follow-Up Huddle Playbook** covers the manager routine that turns these lists into a short daily meeting.

ProfitEdge Systems helps independent retailers and dealers improve profitability and operating performance through consulting, training, and intelligence tools.