Using Trackers to View Information

Are you looking for the most efficient ways to find detailed information about a record? Trackers are your answer.

This system has a lot of trackers. And in addition to being extremely informative, they also have features to protect your data, so don't be shy about exploring the trackers!

Objectives

During this course, you'll review different types of trackers.
Then you'll learn how to use tracker features to find the information you want to see.

- Types of Trackers
- Displaying and Navigating Data

Types of Trackers

There are several kinds of trackers. Many of them are read only versions of entry programs, like the *Customer Tracker, Part Tracker, Job Tracker, and many more. These are nearly identical to the **corresponding Maintenance or Entry programs but there are two important differences.

First, they are read-only. This makes them ideal for looking up data when you don't need to change or add anything. It also eliminates the risk of accidently changing data in scenarios when you want to make certain that doesn't occur.

Second, you can pull in a record and then browse data related to that record. The Customer Tracker is a prime example. We'll explore this more in the next section.

Another type of Tracker is those that display specific information. Choose a part and select Activity. The Part Advisor answers several basic questions about a part, so you only need to search in one place and don't need to run a bunch of reports. As you quote parts or prepare for production of a part, reviewing information about how you have worked with a part in the past is helpful. Part DCD-100-SP is a manufactured part. Using either the nav tree or the cards you can see - we've quoted it, sold it, and produced it many times. You can drill down into one these jobs for even more information about that. And if you want to see if we have any in stock, take a look at On Hand.

And yet another type of Tracker displays targeted transactions. The Time Phase Inquiry shows you future data - when a specific part quantity is needed to satisfy demand on jobs and sales orders, future expected Receipts and future Usage.

And here is current data - your On-Hand Quantity and current Days of Supply.

Displaying and Navigating Data

Let's back go back to the Customer Tracker.

The tracker landing pages retrieves an initial set of records when the form launches. In this case it is a list of Customers.

As you scroll down through the grid, it will continue to add records to the list.

To focus on a Customer, you can either *select from the list, **type in the customer ID, or ***search.

When you search you can select one, or ****several records. If you select several you get a filtered Landing page that you can come back to and save time if you have a few records you will be working with for a while.

If we want to see the open invoices for one of these customers, we ^select the customer, and then use the Activity tab, nav tree, and cards to look at Invoices >Open. While we're here let's look at Orders – use the dropdown to filter for Open orders, Closed orders and more. And just look at all these options in the Activity > nav tree. One-stop-shopping for everything related to this customer!

If somebody makes a change while the tracker is open, no problem. Go to the card overflow and tap Refresh. The display updates with current information.

While you can't change the record, you can add related records. Your options here will differ, depending on the Tracker. In most you can add a memo, or add an attachment, and in the Customer Tracker you can start a Call Log.

Once you're done looking at one record, tap Customer in the crumb bar and choose the next record in your filtered list.

If you want the entire list of records again, tap the overflow and Refresh.

Recap

Let's do a quick recap.

During this course, we looked at different types of trackers and their features

Then we used the Customer Tracker to select and navigate the information.

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