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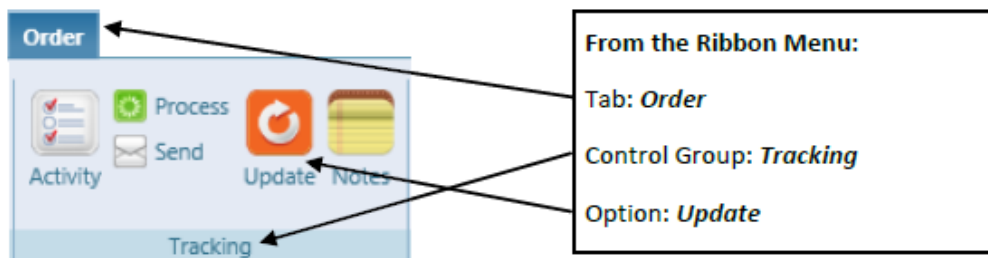
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## How Do You Use Order Tracking Update?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices


### How Do You Use Order Tracking Update?

Track the processes and activities for multiple orders using the Order Tracking Update. The Update grid allows viewing and updating of the activities for multiple orders on one screen.



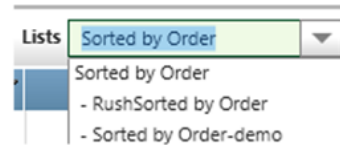
Using the Update icon, activities for orders, customers, and vendors can be added and merged into column form using the wrench tool. These Activities (columns), along with other information contained in an order, can be arranged to follow the flow of the order process your company follows. Activity records can be edited directly on the Tracking Update form using the control types assigned to each: checkbox, combo-box, date or text fields.

Multiple Lists can be created, named and saved, depending on the activities important to your company's departments or individuals who are using the Tracking Update. For example, the Purchasing Manager may have a List that displays Activities pertaining only to their involvement with each order named.

After designing a List, use the "Save View As" option under the Views Action within the  wrench.

Be certain to name the list using a description easily recognized by the

department or position who will use the list.



Order#	Bill To Name	Product Description	Product Code	Ordered	Invoiced	Complete	Product Ship Date	Product In hand Date	Vendor Name	PO/Reference	Customer Code
675	State Farm Insurance	Pique Polo	G1100	47	47	✓	09/15/2015		Alpha Shirt Company		4562
679	State Farm Insurance	Imprinting	ZIMP	47	47	✓	09/15/2015		Embroider and More		4562
677	Allied Insurance	68" Arc Vented, Windproof Umb	4039	100	0		09/15/2015		Hit Promotional Products		1230
676	State Farm Insurance	Pique Polo	G1100	47	47	✓	09/15/2015		Alpha Shirt Company		4562
676	State Farm Insurance	Imprinting	ZIMP	47	47	✓	09/15/2015		Embroider and More		4562
675	Community Motor Co Inc	Arizona Sketch Book	U1124	100	100	✓	09/12/2015		Castell		2100
674	Allied Insurance	6-Panel Structured Trucker Cap	BX019	50	50	✓	09/15/2015		Broder Bros, Co		1230

If you want to have the ability to update the activities on this list, you will need to add the activities to one of the default processes that are set up in System Preferences OR add the appropriate activities under Order Tracking.