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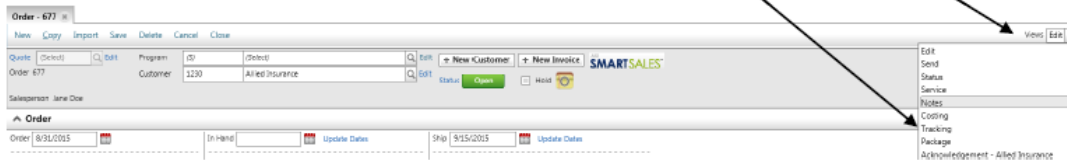
How Do You Use Order Tracking View?

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

How Do You Use Order Tracking View?

Add or Remove Activities and Processes for an order using the Order Tracking View.

When an Order is in the Edit View, select Tracking from the Views screen.



Order 677 Open

Customer

(Select template and update process)

Activities	+ Column
Allied Insurance	

Vendor(s)

(Select template and update process)

Activities	+ Column
Hit Promotional Products	

Order

(Select template and update process)

Activities	tracking number	shipped	ship date	+ Column
677		<input type="checkbox"/>	//	
	Remove	Remove	Remove	

In the Tracking View, you can review and update the process defaults previously assigned in System Preferences. Open the expander for each process type.

There is only one process for each type: Customers, Orders, and Vendors. Multi-vendor orders will have a process for **each** Vendor.

If an Activity is not assigned here through either the Order Processes Default, or added here manually, you will not be able to update the Activity on the Update list!

- An entire Process can be deleted by selecting the X next to the Process Template lookup.
- Selecting a different Process from the Templates when one already exists will replace the existing set of Activities with the Activities assigned in the selected Process.

