Browser and Tracker

While the POS component can be thought of as the front end of LightSpeed, the Main Browser is the primary screen of the back end, providing a central vantage point for all sales documents, Customers and Products, Jobs and Timesheets, and the Tracker.

		Customers	20 of 20 sh	own	Products with	Inventory			19 of 20 sho	0.00
		Q (2)	Name A	_	Q ipod	8		Desc	ription	_
Voil a		Cathy Wilt	(463) 417-7987	Å	MA079LL/A	iPod (20Gb)	299.00	Inventory	11 In Stock	
Xsilva		Cecil Anderson	(463) 786-8890	n	MA079NA/G	iPod Nano	29.00	Inventory	5 In Stock	
Light	Speed	Chin Lee	(780) 246-3362	U.	MA079NA/P	iPod Nano	29.00	Inventory	0 In Stock	-
Ŭ		Donaldson and Sons	(212) 909-8766	-11	MA079NA/R	iPod Nano	29.00	Inventory	4 In Stock 🕨	- 1
	Rory Filbot	Funk Salon	(780) 990-1243	-11	MA099LL/A	iPod nano (199.00	Inventory	6 In Stock 🕨	- 1
	_	Hailey Bix	(212) 898-5461	-11	MA107LL/A	iPod nano (249.00	Inventory	0 In Stock	5
		Jay's Limo Service	(463) 990-9945	¥	MA127LL/A	iPod U2	329.00	Inventory	–1 In Stock 🕨	5
Quotes	SROs	Orders Invoice	s Jobs Time	sheets	Tracker					
								Tracker Setu		
▼ All Calls t	Follow Up									
Cathy V						(463) 417-	7987	View Calls		
Sunny S	urf					(780) 458-	1584	View Calls		
TAll Quote	(Urgent)									
Q-2	10/11/2005	Donaldson and Sons	(212) 90	9-8766	(work)		243.96	View Quote		
Q-7	10/12/2005	Cathy Wilt	(463) 41	7-7987	(work)		522.16	View Quote		
Q-10	10/12/2005	Donaldson and Sons	(212) 90	9-8766	(work)		339.19	View Quote		
All Quote:	(None)									
Q-5	10/11/2005	Hailey Bix	(212) 89	8-5461	(work)		522.16	View Quote		
Q-8	10/12/2005	Cecil Anderson	(463) 78	6-8890	(work)		243.96	View Quote		
Q-9	10/12/2005	Chin Lee	(780) 24	6-3362	(work)		105.93	View Quote		
0-12	10/18/2005						285.69	View Quote		
Q 11	Ready)									
W All SROs (10/12/2005	Sunny Surf	(780) 45	8-1584	(work)		138.03	View SRO		
-										
▼ All SROs ((Requested)									

Each Customer, Product, and sales document can be accessed by double-clicking the line – a new window will open with the resulting document or profile. The Tracker also links to the referenced documents, using a pointer icon on each line:



Each section of the Main Browser also contains tools that allow you to perform advanced searches and filtering to quickly and easily find the information you need.

Customers

The top left section of the Main Browser is where you are able to search your Customers. If you click the All button, all Customers in your database will appear. To perform simple searches, type in a few characters of the Customer name, their telephone number, or their address. The results will appear in a list view below; doubleclick a name to open the Customer profile.



Using the pull-down menu in the Customer section, you are able to search on other criterion in the Customer profile:

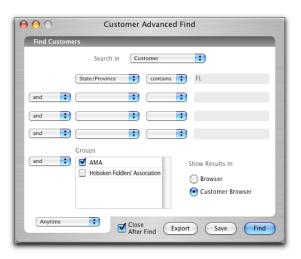


Choosing one of these menu items gives you the flexibility to quickly find the Customer(s) you are looking for. Using this basic search, you can locate all of your Customers in a particular area, belonging to a particular Customer Category, or assigned to a particular User. You can also search based on any customized fields you have created for Customers.

If you need to cross-reference several fields at once – finding all Customers in Florida who belong to the American Manufacturers Association, for instance – you can use the Advanced Find feature, accessible by clicking the magnifying glass icon in the Customer section of the Main Browser. The Customer Advanced Find window will open, giving you the option of searching up to four fields at a time, as well as any Customer Groups the Customer has been assigned to.

Type the criterion in the fields provided, selecting the types and conditions from the pull-down menus. You can further limit your search by choosing one or more of the groups to which your Customer(s) is assigned. You may also use the pull-down menu at the bottom of the window to filter your results in regards to when the Customer was created or modified.

You have the choice to display the results of your Find in a new Customer Browser, or in the Customer section of the Main Browser. Checking the Close After Find



checkbox will close the Customer Advanced Find window once the Find button has been clicked.

Export	Drag Fields to Export
Available Fields	Fields To Export
Customer ID	
Creation Date	
Modification Date	
Creation Datetime	
Modification Datetime	
First Name	
Last Name	
Company	
Type (C = Company/I = Individual)	
Main Name	
Main Phone	
Main Phone Type	
Phone 1	
Phone 1 Type	
Phone 7	I



If you click the Export button rather than Find, the Exporting Window will appear, allowing you the ability to select which fields from the Customer profile you wish to export to a tab-delimited file by dragging them from the first column to the second. Click Export to save the tab-delimited file.

If you want to search using the same criterion at a later date, click Save, and name the Find. Use the pull-down menu to indicate if you want the Saved Find visible to all stations or only to the one on which the Save is being done. This Saved Find will now appear in the pull-down menu in the Customer section of the Main Browser.

Products

Beside the Customer section is the section for Products. The Products displayed will include the Product Code, Description, Selling Price, and availability.

Products with I	nventory			25	Found	d
Q.	0		Descrip	otion 🛟 🌏	AII) (0
FREIGHT	Freight	0.00	Not Inventoried			Ċ
IWWO100	Work Order Labor	25.00	Not Inventoried			
MA004LL/A	iPod nano (2GB white)	199.00	Inventory	1 Total	D	-
MA005LL/A	iPod nano (4GB white)	249.00	Inventory	0 Available	D	L
MA079IH/BO	Head Phones – Bang & Olufsen	159.00	Inventory 0 In	Warehouses	D	L
MA079IH/NV	Head Phones - Nike Vapor	24.95	Inventory	4 Reserved	D	L
MA079IH/RE	iPod Head Phones – Remote & Earphones	39.00	0 Comi	ng For Stock	D	L
MA079IP/W2NGA	iPod Promotion - White 2Gig Nano + Green Arm band	215.00	0 Coming Fo	r Customers	D	1
MA079IS/I	iPod Screen – iPod	99.00	Inventory	1 Total	D	Ŧ

The availability information for each Product is color-coded to reflect its general status – by clicking the availability bubble, you can cycle through the various statuses of each Product.

Total – the total quantity of the Product currently in stock Available – the quantity of total stock currently available for sale Reserved – the quantity reserved on Customer Orders In Warehouses – the quantity in one of the virtual Warehouses Coming for Customers – the quantity coming on POs for Customer Orders Coming for Stock – the quantity coming on POs for Stock Orders

Non-inventoried Products will be indicated in the availability bubble.

The simple Find in the Products section of the Main Browser will allow you to find Products based on their Family and Class, as well as Products recently updated or imported. You are also able to search on any customized field you have added to the Product profile. Clicking All will call up all Products saved in your database, including any non-current Products. Clicking the magnifying glass icon will bring up the Advanced Find.





As with the Customer Advanced Find, you are able to crossreference several fields simultaneously, allowing you to search for very specific subsets of your Product database based on criterion you set using the drop-down menus.

Once you have entered your criterion, you can choose whether to perform the Find, save the search, or export the results, using the buttons at the bottom of the Advanced Find window. You can also filter your results according to their creation or modification dates.

Sales Documents and Tracker

The lower half of the Main Browser gives an overview of all sales documents in LightSpeed, as well as all saved Jobs and Timesheets.

Clicking on a tab will bring up a list view of the sales documents that meet the criteria of the filter chosen on the drop-down menus at the top right of the sales document section. For example, if you want to find all the invoices created for Donaldson and Sons, you would filter based on Customer Name for Invoices Created Anytime. Choosing other filters and date ranges will result in different results.

Quo	otes SRO	s Orders Ir	ivoices Jobs Tin	nesheets	Tracker				4 Invoices Created An
Q dor	nald	0						Customer Nan	ne 🔹 Created Anytime
ID	Date	Customer	Phone	PO	User	Status	Total	Created	Modified
I-3	10/5/2005	Donaldson and Sons	(212) 909-8766 (work)	None	Jason Hilltop	Paid	41.73	13:49:12 on 10/5/2005	15:23:08 on 10/12/2005
I-5	10/6/2005	Donaldson and Sons	(212) 909-8766 (work)	None	Cameron Lyndon	Paid	-41.73	14:42:42 on 10/6/2005	15:23:43 on 10/12/2005
I-6	10/6/2005	Donaldson and Sons	(212) 909-8766 (work)		Jason Hilltop	Paid	212.93	14:43:43 on 10/6/2005	15:53:51 on 9/15/2006
I-36	8/23/2006	Donaldson and Sons	(212) 909-8766 (work)	None	Jenifer Howe	Paid	83.46	14:39:40 on 8/23/2006	15:54:08 on 9/15/2006

Clicking on the header for any column will sort the diaplyed lines based on that criteria. Clicking it again will reverse the sort. The tab for each sales document offers different filters with which to search. While all sales documents allow you to search based on Customers and Products, criterion unique to each type will also be available. Type the data you're searching for in the search bar at the top left of the sales document section.

Quotes

Quote ID
Customer Name
Customer Phone
Customer PO
Product Code
Product Description
Product Class
Product Family
Status
User
Printed Notes
Internal Notes

S	ROs
	SRO ID
0	Customer Name
	Customer Phone
	Customer PO
	Model Checked In
	Serial Number Checked In 🦉
	Warranty
	Warranty Info
	Problem Description
	Work Performed
	Part Code
	Part Description
	Part Class
	Part Family
-	Status
	User
	Printed Notes
	Internal Notes

Orders









Any filter can also be further displayed by date; documents can be sorted that have been created or modified that day, the day before, within the last week/month/year, or within a certain date range. Each document will have its Customer info, ID number, date, User, Status, and Total displayed. Double-click any line to open the sales document.

In addition to sales documents, the Main Browser will display Jobs saved in LightSpeed, including the time spent on them, as well as User Timesheets. Timesheets are displayed including the Job and Task to which they are linked, their Status (Current or Completed), and the Total Time involved.

Tracker

Tracker is LightSpeed's unsung hero. Normally, when a message from a Customer is taken. Products are reserved for a User, or a repair is completed and ready for pickup, an email would have to be composed by a receptionist, an inventory controller, or a technician, and sent to the appropriate person who would then have to act on it. Tracker allows any User to decide which changes happening in LightSpeed are relevant to them, "install" them into their User profile, and be notified in real-time if any sales documents, calls, notes, Purchase Orders, and other information is changed in any way.

Quotes	SROs	Orders Invoices	Jobs Timesheets Tracker			
O-28	8/23/2006	Chin Lee	(780) 246-3362 (work)	383.06	View Order	>
0-29	8/23/2006	Cecil Anderson	(463) 786-8890 (work)	281.36	View Order	>
O-34	9/6/2006	Donaldson and Sons	(212) 909-8766 (work)	275.01	View Order	
O-35	9/7/2006	Sandra Higgins	(212) 895-6969 (work)	1176.26	View Order	
O-38	9/13/2006	Cecil Anderson	(463) 786-8890 (work)	450.11	View Order	
My Orders	Received) (4)					
0-31	8/30/2006	Chin Lee	(780) 246-3362 (work)	276.10	View Order	
0-32	8/30/2006	Chin Lee	(780) 246-3362 (work)	40.95	View Order	
0-44	9/20/2006	Cecil Anderson	(463) 786-8890 (work)	203.94	View Order	
O-48	9/20/2006	Hailey Bix	(212) 898-5461 (work)	103.00	View Order	
My Orders	Invoiced) (1)					
O-45	9/20/2006	Cathy Wilt	(463) 417-7987 (work)	77.25	View Order	
My Orders	Cancelled) (0)					
My Orders	with Received	Backorders to Reserve (8	5)			
0-25	1/9/2006	Sunny Surf	(780) 458-1584 (work)	564.91	View Order	>
0-28	8/23/2006	Chin Lee	(780) 246-3362 (work)	383.06	View Order	>
0-29	8/23/2006	Cecil Anderson	(463) 786-8890 (work)	281.36	View Order	>
0-31	8/30/2006	Chin Lee	(780) 246-3362 (work)	276.10	View Order	>
0-32	8/30/2006	Chin Lee	(780) 246-3362 (work)	40.95	View Order	>
0-34	9/6/2006	Donaldson and Sons	(212) 909-8766 (work)	275.01	View Order	>
O-35	9/7/2006	Sandra Higgins	(212) 895-6969 (work)	1176.26	View Order	>
0-44	9/20/2006	Cecil Anderson	(463) 786-8890 (work)	203.94	View Order	>

Installing a Tracker is done in the User Preferences window, accessible with the Tracker Setup button found in the upper right section of the Tracker tab. There are two columns – the left contains all possible Trackers, and the right displays the "installed" Trackers that each User wants to have displayed on the Main Browser.



$\Theta \Theta$	1	User Preferences	
Tracker		Drag Trackers	to Install
Available Trackers		Installed Trackers	
My Quotes (Urgent)	-	My Orders (Partially Received)	_
My Quotes (Invoiced)		My Orders (Invoiced)	_
My Quotes (None)	U	My Orders with Received Backorders to Reserve	
All Quotes (Urgent)		My Orders with Backorders not Invoiced or Cancelled	
All Quotes (Invoiced)		My Calls to Follow Up	
All Quotes (None)		My Customer Notes to Follow Up	
My SROs (Invoiced)			
My SROs (None)			
My SROs (Diagnosis)			
My SROs (On Bench)			
My SROs (Parts Ordered)			
My SROs (Ready)		N	
All SROs (Invoiced)			
All SROs (None)	* *		
All SPOs (Diagnosis)	Υ.		_
Satura of Salastad		in the last hour(s)	
Setup of Selected Ale	erted		
		contains	
Search			
Customer/Product Search Sty	vla	Use Company Default	
Customer/Froduct Search Sty	yre	ose company belauit	
			Com
			Save

To install a Tracker, drag it from the first column and drop it onto the second. You can further qualify its being displayed using the two pull-down menus below the columns. The first allows you to indicate the time-frame the document was created or modified, and the second allows you to filter it based on attributes of Products; class, family, description, etc.



If the Tracker is especially important, you can use the Alerted checkbox to have it appear in red in the Main Browser. At the bottom of the User Preferences window, you can use the pull-down menu to indicate the preference for Customer and Product searches in the Main Browser; whether to search as the User types, or once they press Return. Click Save to save any changes to the Tracker or to User Preferences. These changes will now be reflected in the Main Browser.

