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Returns Tracker (fka Case Tracker)

Megan De Freitas - 2024-12-03 - Returns Tracker (fka Case Tracker)

Overview

The Returns Tracker (fka Case Tracker) module offers a solution for monitoring different customer-related issues in order to verify that each issue is resolved in a timely, appropriate fashion. Cases can be linked to customers and specific sales documents, and they can be managed from one central location.

Data entered in the Case Tracker module is only stored in SalesPad's SQL tables; it does not affect Microsoft Dynamics GP SQL tables. Case Tracker is available via a separate dll. For information on acquiring the Case Tracker dll, please contact your territory manager.

Usage

After installing the dll, the Case Tracker tab is available along the top of the screen. From this tab, you can access the Case Tracker modules.



New cases can be created on the Case Tracker Entries tabs on the either the Customer card or sales document. From either location, click the **New Case** button in the upper left-hand corner of the tab to create the new case. If a new case is created from the Customer card, it can be assigned to a sales document at any time.

🤱 Customer Search 🛛 ᠲ Sales Documents 🗴 🗋 (QUOTE) QB8018 🗵 🔒 Case Tracker Detail Search 🗵 🍺 Case Track Entry 🗴												
📑 Close 🛃 Save 🍪 Print 📳 🛛 👗 Delete 🗅 Copy 🏄 Dynamics GP 🔤 Z-US\$ 👻												
– Document Prop	perties											
Document #: QB8018										QUOTE		
Customer #:	AARONFITO	001										Aaron
Cust PO:												Sales Rej
Reg Ship:	8/28/2017										~	Sales Ter
Ship Method:	UPS GROUN	D									~	Pay Term
Whse:	WAREHOUS	E									\sim	Doc Date
Currency:	Z-US\$										\sim	Created
Line Items	Notes Ad	dresses	Holds	User Fiel	ds Audit	Related Docur	ments	Purchases	Quick	Report	FedEx	Quote
<mark>-</mark> New Case	💢 Delete	🔞 Refre	esh									
-	Case ID	Contact			Status		Assign	ed To		Ship To A	Addr	

Case information is entered in the Case Tracker Entry screen. The Customer Information and the Case Details sections of this screen are where customer and document-level information for the case is recorded.

 Customer Informa 	tion	
Customer Num:	AARONFIT0001	
Customer Name:	Aaron Fitz Electrical	
Ship To Addr:	WAREHOUSE	\sim
Customer Addr:	11403 45 St. South Chicago, IL 60603-0776 P: (312) 555-0102 F: (312) 555-0102	

Case Details			
Contact:		Sales Doc ID:	STDORD
Status:	New Case 🗸	Sales Doc Num:	ORDST2425
Queue:		Sales Doc Type:	ORDER
Assigned To:	sa 🗸	PO Number:	
Open Date:	10/9/2018 12:56:37 PM	Closed Date:	1/1/1900 12:00:00 AM
Entered By:	sa		

The tabs on the lower section of the Case Tracker Entry screen allow further definition of the case. Edit the details of the case (including the issue, cause, and resolution, which are defined in the Case Tracker Maintenance module) in the Details tab. Click **Add Detail** to start.

Details User Fields Resources Interactions Audit AR Transactions Reorders/Returns

Add Detail K Delete Detail										
Doc Type	Sales Doc Num	Comment	Resolution	Cause	Issue	Qty	Item Number			
Doc	Sales Doc Num	Comment	Resolution	Cause	Issue	Qty	Number			

Select the item associated with the case by clicking the **ellipses** in the Item Number column. The Sales Line Selector will appear with a list of items on the sales document. Select the desired item(s), then click **OK**.

=		Sales Line Selector				- 🗆 🗙
🛃 Select All	🗙 Select I	None				
 Sales Line Iten 	ns					
Selection	Item 📍	Description	Qty	UOfM	Price	Cost
	HD-120	120 Gig hard drive	50	EACH	0.00	0.00
	HD-40	40 Gig hard drive	50	EACH	41.00	10.00
× [Select	tion] = 'Ched	ked' And Starts with([Item], 'HD')				Edit Filter
				[ОК	Cancel

The Detail Properties section of the Details tab is used to define the Issue, Cause, and Resolution of lines added to the Case Details tab. Issues, Causes, and Resolutions are created in the Case Tracker Maintenance module.

– Detail Properti	25
Detail ID	3
Issue	
Issue	Broken merchandise V Issue ID 1
Description	Customer unsatisfied with quality of merchandise
Cause	
Cause	Bad packaging V Cause ID 2
Description	Insufficient or damaged packaging ····
Resolution	
Resolution	Reorder generated V Resolution ID 1
Decription	Items replaced ···

User fields created on the Case Tracker Case business object appear in the User Fields tab.

Documents and other files can be added to cases from the Resources tab. For more information on resources, see the documentation $\underline{here.}$

SalesPad Interactions can be added to cases from the Interactions tab. For more information of Interactions, see the documentation $\underline{here.}$

The Audit tab tracks changes made to the Customer Information and Case Details windows over the life cycle of a case.

AR Transactions can be added and linked to a Case Tracker case from the AR Transaction tab. For more information on AR transactions, see the documentation found <u>here.</u>

The Reorders/Returns tab allows addition and linking of multiple reorders and returns to a case .

Case Tracker Detail Search

The Case Tracker Detail Search screen allows you to sort through existing cases and quickly access any of these cases.

🤱 Customer Search 🖬 👦 Sales Documents 🖬 🗋 (QUOTE) Q88018 🖾 🚡 Case Tracker Detail Search 🖬 😥 Case Tracker Entry: 4 🖪 🚡 Case Tracker Entry: 4 🖪											
Close So Search Clear											
Search By											
Case Track ID:			Ship To:				Cause:				
Customer Num: Aa	Aaron										
Customer Name:			State:					:			
Assigned User:		~	Zip:				Status:				
- Search Results											
Case Trad	Case Track ID Customer Num Customer Name		Cause	2	Issue Re		Status		Contact		
	1 AARONFIT0001	Aaron Fitz Electrical						Open	Mark		

Case Tracker Setup

Case statuses are created in the Case Tracker Setup module. Statuses are created with the Add button and removed with the **Delete** button. Each status will have its own entry in the Case Tracker Monitor tree layout. \Box Case Tracker Status

Status	Description	Set Historical	Created By	Created On	Updated By	Updated On
New Case	Newly Entered		sa	5/17/2018	sa	5/17/2018
In Progress	Case undergoing evaluation		sa	10/9/2018	sa	10/9/2018
Resolved	Case has been completed. No further action needed.		sa	10/9/2018	sa	10/9/2018

Case Tracker Monitor

Case statuses can be quickly reviewed in the Case Tracker Monitor module. Each status entered in Case Tracker Setup will appear in Case Tracker Monitor, displaying the number of current cases assigned to the status.

	Case T	racker Monitor	×								
	Close 🗟 Refresh Refresh Refresh Manually 🝷 Assigned User: (all) 🔹										
Selec	t	Status 🔺	Count			Case ID	Customer Num	Contact	Assigned To	Case Tracker Statu	
4		In Progress		0	🔺 Case	Tracker Sta	atus: New Case				
	~	New Case		1		<u>4</u>	AARONFIT0001		sa	Newly Entered	
	~	Resolved		0							

Case Tracker Maintenance

Issues, Causes, and Resolutions entered in new cases are created in the Case Tracker Maintenance module. To create a new Cause, Issue, or Resolution, click on the relevant tab, then click the **New** button and enter an ID, name, and description. To make a selected line historical, and thereby remove it from the list, simply click the **Make Historical** button.

1	Case Tracker Cause, Iss	ue, and Resolution Maintenance	-	×
🛃 Save 🕴 🖶 New 🛛 🖊 N	Make Historical			
Cause Maintenance	intenance Resolution Maintenance			
Cause ID	Cause	Description		
2	Bad packaging	Insufficient or damaged packaging		
3	Bad packing slip	Packing slip contained errors		
			ОК	Cancel

Security

Case Tracker AR Transaction Entry - No description available.

Case Tracker AR Transactions - Grants access to the Case Tracker AR Transactions tab on the Case Tracker Entry screen.

Case Tracker Audit - Grants access to the audit tab on the Case Tracker Entry screen.

Case Tracker Detail Search - Find Case Tracker details based on various search parameters.

Case Tracker Details - Create new and modify existing Case Tracker details for the currently open case.

Case Tracker Entry - Create and edit Case Tracker information.

Case Tracker Interactions - Grants access to the Interactions tab on the Case Tracker Entry screen.

Case Tracker Maintenance - Add new and edit existing issues, causes, and resolutions.

Case Tracker Monitor - Grants access to the Case Tracker Monitor module.

Case Tracker Reorders/Returns - Grants access to the Reorders/Returns tab on the Case Tracker Entry screen.

Case Tracker Report - A report template that prints the details of a specific case. Copies of this template can be customized in the Report Designer module.

Case Tracker Resources - Grants access to the Resources tab on the Case Tracker Entry screen.

Case Tracker Setup - Grants access to the Case Tracker Setup module.

Case Tracker Status - Contols access to the Case Tracker Status window in the Case Tracker Setup module.

Case Tracker User Fields - Grants access to the User Fields tab on the Case Editor Entry screen.

Customer Case Tracker Entries - Find Case Tracker entries tied to the currently open customer.

Sales Document Case Tracker Entries - Find Case Tracker entries tied to the currently open sales document.