Solution Note - Tracking Materials Needed

How to track materials with your Touchplan production plan using Touchplan Custom Fields

Problem Statement

While the total amount of needed materials is often known at the beginning of a project, coordinating how much of that material is needed at specific times can get tricky, especially when those materials are in high demand. As plans change, deliveries also need to be adjusted to ensure the work can be completed.

Solution

Create a Custom Field for "planned material needed" and include this information as activities are being planned out. Now the team can easily see what the demand for materials will be and get out in front of potential issues before they become real problems. As the plan is changed, the team will be able to see how that affects the timing of materials and adjust orders accordingly.

Related Materials

Object	Link	Description
Video	Intro Video	Introduction to Custom Fields
Video	Facilitating Material Deliveries	Using Custom Fields to Facilitate Material Deliveries
FAQ	Custom Fields Video	How to Use Custom Fields

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Step-by-step instructions

1. Go to the Custom Fields dialog box to add new fields.
2. Create custom field for "Planned *Material* Needed" and assign them to the desired roles. The *Material* field in the example would be replaced with the material you are looking to track. (ex. Concrete, Sheets of Drywall, Drain Pipe)
   a. The specifics on these fields will vary depending on what material is being tracked. The Type may be a "Number" field that can have an assigned Unit of Measure (ex. Cu. yds of Concrete) or a Text field that may not need a specific unit defined (ex. # of FE Cabinets)

Create and plan activities following your normal workflow and fill in the "Planned Material Needed" field where appropriate.

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4. To review and analyze these new fields, export a plan or project CSV. The data can then be sorted, filtered, or summarized to see how much is needed of certain materials and when they will be needed on site.

Note: Analysis can be done using spreadsheet software.

Help is available
For help with creating custom fields, visit the FAQ here:
Use Custom Fields | Touchplan.io Help Center

For help exporting a plan or project CSV, visit the FAQ here:
Export Reports | Touchplan.io Help Center

For live help, click on the "Support" drop down in the top right corner of your planning screen and click the "Live Chat" button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?
We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat

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