

Solution Note CF-04 - Quantity Tracking

How to input and track material in place on Touchplan tickets utilizing custom fields

Problem Statement

Project teams often have to spend time referencing multiple systems alongside Touchplan tickets to reconcile when material was used and calculate their progress.

Solution

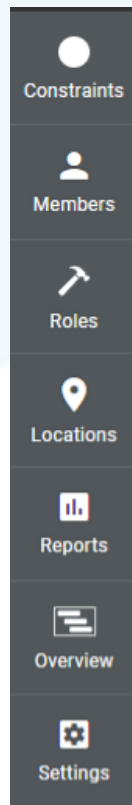
Touchplan has a solution for users to track material in place on tickets and view the data in a dashboard. A project admin can activate the Enable Quantity Tracking button to produce the needed custom fields in their Touchplan tickets. Any user can then access the Quantity Tracking dashboard where they can view and filter their material in place data on a per project basis.

Related Materials

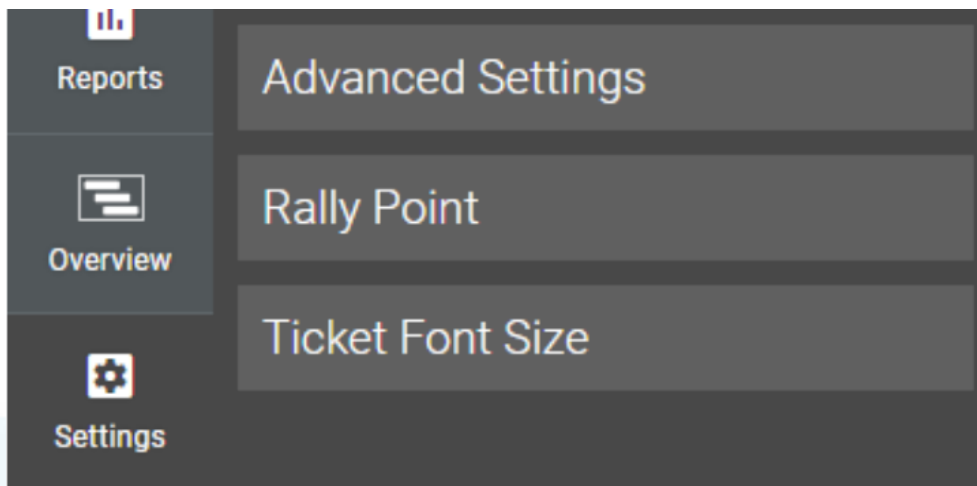
Object	Link	Description
Video	Intro Video	Introduction to Custom Fields
FAQ	Use Custom Fields	How to Use Custom Fields

Step-by-step instructions

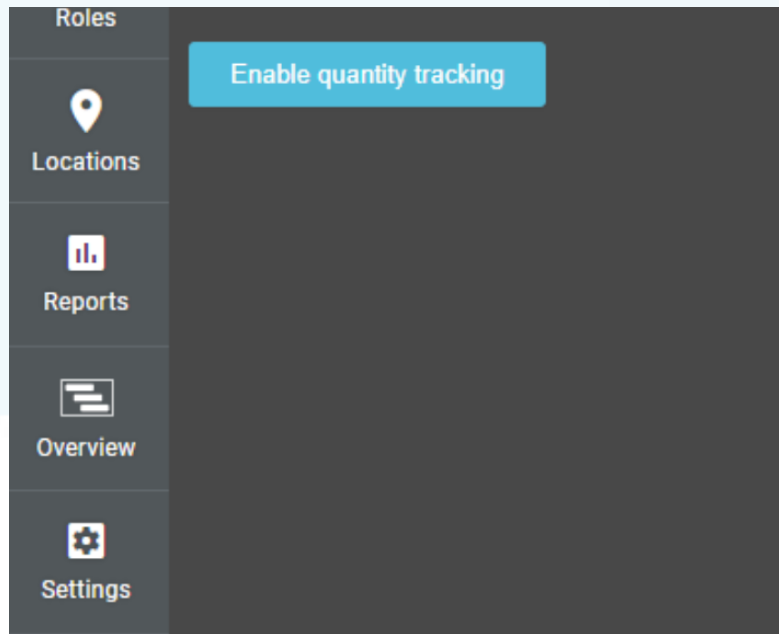
1. As a project admin, select the settings menu



2.. Select advanced settings

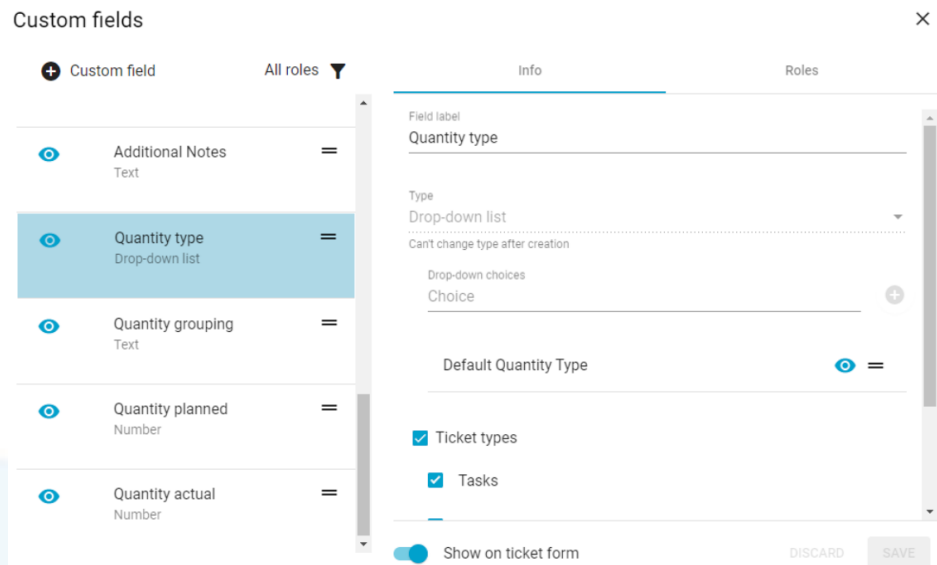


3. Click to the button to enable Quantity Tracking

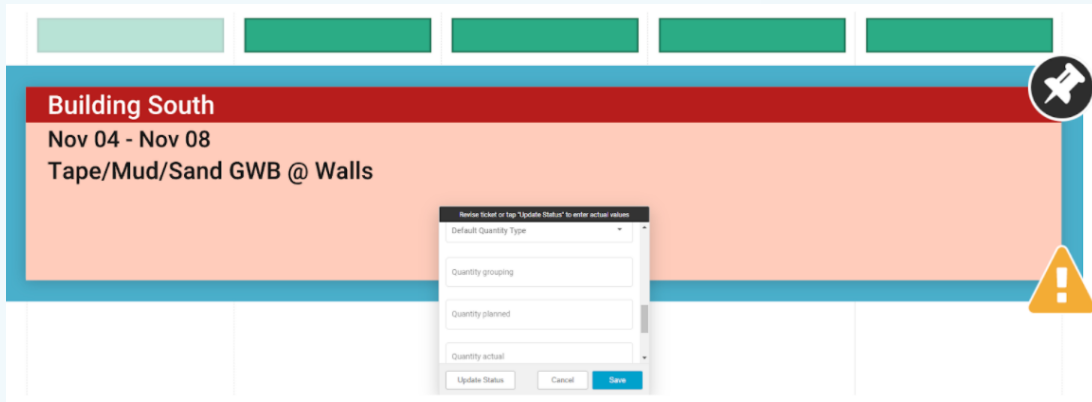


4. Go into the Custom Fields configuration

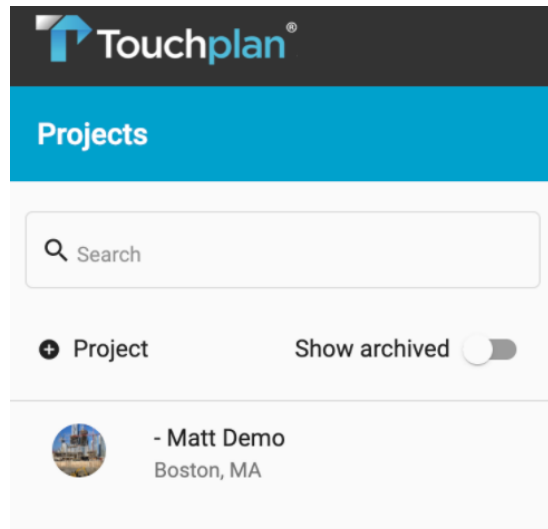
1. Select the 'Quantity Type' Custom Field
2. Add into the the drop-down choices what will be tracked
3. Optionally configure the roles that the 'Quantity Type', 'Quantity Grouping', 'Quantity Planned', and 'Quantity Actually' Custom Fields appear on



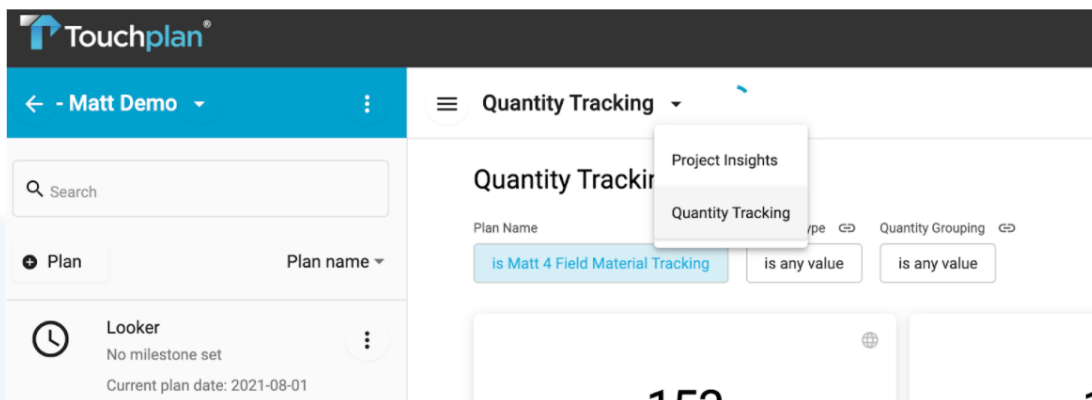
5. Begin tracking quantities on tickets



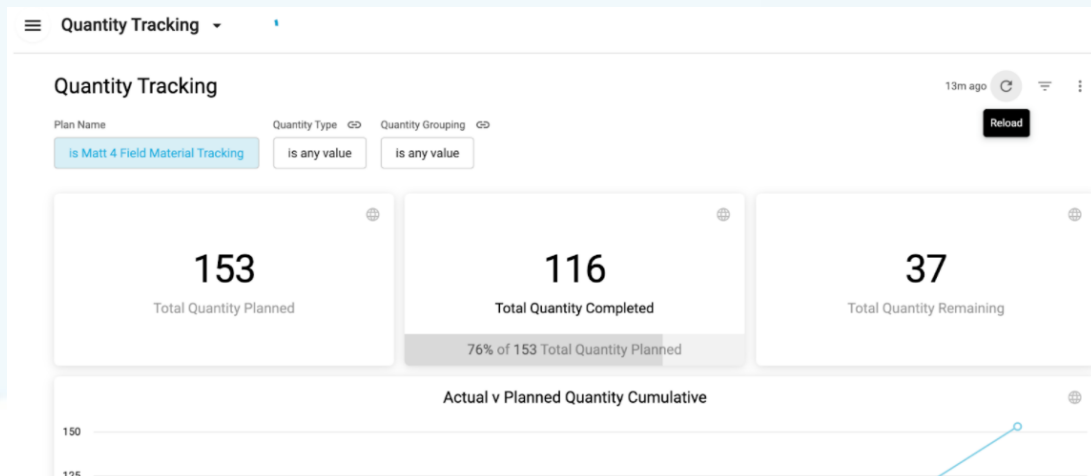
6. Select a Project from the Project List in Touchplan



7. To the right of Project Name, click the drop-down arrow and select **Quantity Tracking**



8. Input desired filters and click the reload icon on the right side of dashboard to apply the filters to the dashboard tiles



Note: The information found in this dashboard is updated daily

Help is available

For help with creating custom fields, visit the FAQ here:

[Use Image Attach | 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