

Catapult Queries & Watches - Course Outline

During this 45 min session, we will dive into the details of building and using Queries & Watches



1. Queries vs. Watches

2. Queries

- Review the Query List page and demonstrate how to add, edit and remove Queries.
- We will build a new Query together and review each filter section in detail, including:
 - Date Filters
 - Equipment Filters
 - Filing Filters
 - Buyer Filters
 - Geography Filters
 - Fleet Filters
 - Omissions Filters
 - Save Copy to User
- Discuss common applications

3. Watches

- Review the Watch List page and demonstrate how to add, edit, and remove Watches.
- Quickly discuss how your default "Time Frame" impacts the results and email alerts.
- Demonstrate how an Administrator can save copies of Watches to other users

- For each of the Watches, we will discuss common applications and build a sample together.
 - CustomerWATCH
 - LeaseWATCH
 - ProspectWATCH
 - ServiceWATCH
 - EventWATCH – uploading the list to be used in with the EventWATCH is not covered in this training session.

4. Export Options

- Once we use the Queries & Watches to get our desired results, we will quickly review the various export options that are available to analyze the results.
- Focus on the Export Options of
 - Finance Summary Reports
 - Google Mapping
 - Query Results – to be used with the Catapult Analytics Tools