Using Sales Orders

Andrew:

This Sales Order is asking for Cash payment, but I need to put it on their account's credit… Where's that option?

Robert:

Why don't we start from the top of the Sales Order, and make sure we get it all right!

Select a Topic to see it explained!

Topics:

- Customer Information
- Adding Items and Charges
- Completing the Order

Customer Information

Enter the customer information on the top half of the Sales Order. Press the arrow button to watch an overview on the next slide.

When you add a customer to the Sales Order, BisTrack automatically loads their default address.

Enter a contact name, or use the Properties button to enter detailed information.

Use the ID button to enter Loyalty Card information.

Every order requires you to enter customer information.

Start by selecting Order on the Home tab.

On the New Sales Order window, enter the customer's name in the Customer field and press Enter.

Then select the customer you want from the list and press OK.

If your customer has an account with your store, BisTrack adds the default address on file.

You can change this by selecting the Deliver to button.

This opens a Find function window that you can use to search for a different address.

It's also possible that your customer doesn't have and account or wants her purchase delivered to a location that's not in the records.

You can enter address information for non-account customers by selecting the Address Properties icon.

Type the information on the Properties window and select OK when finished.

You can also select the One-Time Address icon to enter a delivery address manually.

Select a Contact name from the drop-down menu or choose the Properties icon to enter the information.

Enter the contact's basic information: Name, Phone, and E-mail.

You can select the Show More button to expand the window and enter more comprehensive details across multiple tabs.

If the customer has a loyalty account, select the ID icon to enter the information.

You can view and edit the contact for this customer by selecting the Contact Properties icon.

This only works if there's a contact selected in the Contact name field.

When you've selected a customer contact, their phone number displays in the Contact number field. You can change it if necessary.

Adding Items and Charges

Sales Orders use the Quick Entry field to add products to the order.

Read More…

You can add additional charges using the Additional Cost / Charges tab. These charges are prorated across all items on the Sales Order.

Once you've entered the customer information on the order, it's time to add the items for purchase.

BisTrack defaults the Order Line Selection Method to Product, Qty, but you can select another option from the drop-down menu.

Scan the item or type it in the Quick Entry field and press Enter.

Once you've selected the product, the products quantity and price details display here.

The customer price profile and price rules determine the price automatically.

Sometimes you'll add items to the order that you sell in different units of measure such as lumber, which you can sell by the Each or Linear Foot.

Adjust the Unit of Measure and Quantity to reflect how much product you want to add to the Sales Order.

Change the Price Unit of Measure and amount to set how the price displays on the Sale Order.

Press enter to add the product to the order.

You can edit the Qty or Sell Price fields for a product already on the Sale Order.

When you manually change a line's price, BisTrack displays an M icon.

If the new price makes the margin percent lower than expected, a warning icon appears.

Use the Additional Cost / Charges tab to add fees like third party delivery.

Your store's policy determines if you use these, so verify this with your manager.

When you enter an amount here BisTrack prorates it across all items on the Sale Order.

Select the Add button to find the additional cost or charge using the Find function.

To set a Supplier, select the ellipsis button to open a Find function.

Assign the Cost value to your cost for the delivery, and the Charge Value to the price for the customer.

You can enter additional sale information such as Delivery and Invoicing details, and more on the Instructions tab.

Completing the Order

When you press the Complete button, BisTrack confirms payment, assigns a Sales Order number, and processes the order.

Read More…

Use the Cash Sale checkbox to change between credit and cash sales.

You can complete Sales Orders as either a credit sale or a Cash sale.

If you are processing a sale for an account customer, you can enable The Cash checkbox to treat it as a Cash sale instead.

When you set it as a cash sale, the credit limit disappears from the banner.

Choose Complete to process the order.

When you complete a cash sale, BisTrack prompts for the payment details with the Sales Order Completion window.

Enter the payment details, and select Finish.

BisTrack processes the sale, assigns a Sales Order number, and opens a new Sales Order window.

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