BisTrack Cloud Signatures and Attachments

Enhancements to BisTrack Cloud functionality include capturing signatures and adding attachments during sales order or quote entry.

It is also now possible to add attachments to Customers, Contacts and Opportunities.

A paper clip icon is displayed in the 'Quick Order' toolbar.

Selecting it opens a new page for attachments.

The white boxes are similar to file folders that would be displayed in BisTrack.

Select 'Sales Order Attachments'.

Two options appear to 'Add attachment' and 'Add signature'.

To capture your customer's signature on the order document select 'Add signature'.

Your customer enters their signature in this window.

Once entered select 'Save' to complete the entry.

The signature is added as an attachment to the sales order.

From this page you can also attach other files such as material estimates, house plans, or contracts.

Selecting the 'Add Attachment' option displays the 'Choose File' button.

Click on it to find a file to attach to the order.

Once a file is chosen its name is displayed.

You can choose to add a 'Description' and 'Category' and then 'Upload' the file.

The file appears with the signature as an attachment to the order.

You can continue to add attachments as needed.

When finished select the 'Summary' icon to complete the order.

From the Home page select the 'Customers' tile.

Locate your customer.

A new 'Attachments' option is in the left pane. Select it.

Any folders previously set up in BisTrack are shown.

Select the folder where the attachment will be placed.

The options 'Add attachment' and 'Add signature' are available.

These work the same as was shown with sales order documents.

Attachments uploaded to the customer are listed as cards on the page.

You can also add an attachment to a Contact.

The 'Contacts' option is selected from the left pane and a Contact selected.

The Contact's page shows the details in the upper section and attachments below.

To add an 'Attachment', select the edit icon.

Select the '+' add icon in the Attachments bar.

Proceed through the steps to add an attachment or signature.

When finished select the checkmark to save the attachment.

It now appears on the Contact's page.

Use this same method to add attachments to Opportunities and other documents in BisTrack Cloud.

Adding signatures and attachments directly from within BisTrack Cloud provides sales people with further tools to secure sales and better serve their customers.

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