

## Using Sections and Summary Lines

Quotes and orders for large projects can be difficult for you and your customers to review.

BisTrack provides a number of ways for you to enhance the readability of your sales documents.

In this course, we demonstrate how to insert sections, add summary lines, and consolidate duplicate product lines so that you can organize your records effectively.

### **Insert Sections**

BisTrack uses sections to arrange products into logical groups within sales documents.

On this Quote for a new house project, sections are beneficial for organizing products by building phase.

Sections also provide functionality for more complex BisTrack processes such as call-off orders where you create sections to deliver materials to the customer in phases.

Now let's see how to add a section.

Pick the line where you want to begin the section.

Click the Section button or press the F3 key.

BisTrack opens the New Order Section window and enables the Section start option by default.

Next, you'll define the section by enabling a predefined Section Code from the Order Sections table. You can enter a partial description in the Section start field or click the ellipsis to open the Find Section window.

Since we entered 1st, BisTrack displays the matching records from the table.

Choose from the list displayed, and then click the Select button.

Now you'll need to identify where to start the section.

You have three choices. They include: At the end of the sales document, Before the selected line, or After the selected line.

We'll choose Before selected line so that it's easy to identify the section content below the section line.

Click OK.

BisTrack inserts the section description into the sales document at the line you selected.

You also need to show where the section ends. Find and select the last line of the group, and then press the Section button or F3 key.

BisTrack automatically enables the Section end option and includes a suggested description. You can change or add to the description if needed.

The system also enables the Add subtotal option by default, which adds a summary total to the section.

As with the section start, you'll need to indicate where to position the Section end.

Click OK when finished.

BisTrack inserts the description along with a subtotal for the section.

Any additional products you add to the section automatically update the subtotal.

### **Add Summary Lines**

Sometimes you may want to subtotal a group of lines without adding a section. Do this by adding a Summary Line.

First, select the range of lines to sub-total.

Then click the Other Options button or press the F11 key.

BisTrack opens the Other Options window.

Choose Add Summary Line.

Enter the text that you want to appear on the summary line.

BisTrack provides some pre-set text, but you can overwrite or add to it.

Click Ok when finished.

The system adds the summary line with the description and subtotal amount after the last product in the selection.

### Consolidate Duplicate Lines

Occasionally, products get duplicated on orders, creating multiple lines of the same item. This can make your sales documents inefficient.

BisTrack has several approaches for consolidating duplicate lines. Let's examine each.

A best practice to avoid duplicates is to enable the Merge product lines toggle switch.

The icon appears depressed when it is on.

Start by adding a product to the order.

Then add the same product a second time.

Instead of adding the same product again, BisTrack consolidates them into one and updates the Total Price.

With the Merge product lines toggle switch disabled, you can still consolidate duplicate lines.

With the products added, select the Other Options button.

BisTrack opens the Other Options window.

There are three options available for consolidating lines.

### Consolidate All Lines

### Consolidate All Within Sections

### Consolidate Within Selected Sections

Use the Consolidate All Lines option when the sales order does not have Sections.

The system finds and merges any duplicate product lines and updates the quantity.

When a document has sections, you can consolidate within sections.

Begin by selecting the section start line.

You can choose multiple sections if needed.

Press F11 to open the Other Options window.

Select Consolidate Within Selected Sections.

The system consolidates duplicate lines within the selected sections.

However, duplicate products will still exist within sections that you did not select.

To eliminate all duplicates, choose the Consolidate All Within Sections option.

Take caution when using the consolidate Options.

When sections exist and you choose Consolidate All Lines, the system removes any section and subtotal lines that you entered for the merged product lines.

Once you consolidate lines, you cannot undo the consolidation.

The system will not consolidate lines when there is a different price on one of the duplicate lines.

### **Closing**

It's helpful to both customers and staff when complex sales documents are organized and succinct.

You should now be able insert sections and summary lines.

Merging duplicate lines should also be easy using the consolidate options.

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### Corporate Office

804 Las Cimas Parkway  
Austin, TX 78746  
USA

Toll Free: +1.888.448.2636  
Direct: +1.512.328.2300  
Fax: +1.512.278.5590

### Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104  
Plaza Central, Col. Santa Maria  
Monterrey, Nuevo Leon, CP 64650  
Mexico

Phone: +52.81.1551.7100  
Fax: +52.81.1551.7117

### Europe, Middle East and Africa

No. 1 The Arena  
Downshire Way  
Bracknell, Berkshire RG12 1PU  
United Kingdom

Phone: +44.1344.468468  
Fax: +44.1344.468010

### Asia

238A Thomson Road #23-06  
Novena Square Tower A  
Singapore 307684

Singapore  
Phone: +65.6333.8121  
Fax: +65.6333.8131

### Australia and New Zealand

Suite 2 Level 8,  
100 Pacific Highway  
North Sydney, NSW 2060  
Australia

Phone: +61.2.9927.6200  
Fax: +61.2.9927.6298