Using Sections and Summary Lines

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

The system gives you several ways to enhance the readability of your sales documents.

Select a topic and we'll show you some options.

Topics

- Insert Sections
- Add Summary Lines
- Consolidate Duplicate Lines

Insert Sections

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

Beyond that, sections provide additional functionality for more complex BisTrack processes.

To insert a section, pick the line where you want it to begin.

Select the Section button.

The system automatically selects the Section start option.

Enter a partial description to search for a section from the Order Sections table or select the ellipsis to open the Find Section window.

Choose a record from the list and then press the Select button to open the New Order Section screen.

Decide where to position the section start.

Your choices are: 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 content for the section below the section line.

Click OK when finished.

Now you'll want to identify where the section ends so move to the last line of the group.

Press the F3 key to reopen the New Order Section window.

The system automatically selects the Section end button with a suggested description.

You can change or add to the description.

The Add subtotal option is enabled by default. This adds a summary total to the section.

Now select an option to position the Section end and choose OK.

The system adds the description and a subtotal for the section.

Adding products to the section automatically updates the subtotal.

Select How to Insert Lines to review the topic.

When you're finished, select the right arrow icon to go to the next topic.

Add Summary Lines

Read each section and use the Next button to move to the image.

When you're finished, select the right arrow icon to go to the next topic.

Select the lines that you want to subtotal and then click the Other Options button.

Choose Add Summary Line.

Add a description to the Line text and click OK.

The system adds a Subtotal line for the lines you selected.

Select the right arrow icon to go to the next topic.

Consolidate Duplicate Lines

The system has a few approaches you can take to consolidate lines when adding the same product to a sales document multiple times.

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

The icon appears depressed when it is on.

Here's an example

Start by adding a product to the order.

Add the same product a second time.

Instead of adding the same product again, the system consolidates the two quantities and updates the Total Price.

If you enter sales documents with the Merge product lines toggle switch set to off, it is still possible to consolidate duplicate lines.

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

With the products added, select the Other Options button.

You have three options.

Consolidate All Lines, Consolidate All Within Sections, and Consolidate Within Selected Sections.

When the sales order does not have Sections, choose the Consolidate All Lines option.

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

To consolidate lines within a specific section, select the section start line.

You can choose multiple sections if needed.

Open the Other Options window.

Select Consolidate Within Selected Sections.

The system consolidates duplicate lines within the sections that you selected.

However, duplicate products remain within other sections.

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

Take caution using the consolidate Options.

When sections exist and you've chosen Consolidate All Lines, the system removes any section and subtotal lines entered for the merged product lines

It's important to note that you cannot undo the consolidation.

Also, the system will not consolidate lines if there is a different price on one of the duplicate lines.

This completes the information for this training on demand.

Select the right arrow icon when you're ready to take the quiz.

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