Using Notes, Special Instructions, and Text Lines

Customer

"Call when you're on your way so we can make sure to have a spot clear for the delivery."

Andrew (clerk)

"Sounds good, I'll have the driver call when he leaves."

Robert

BisTrack makes it easy for you to keep track of vital notes.

Pick a topic and I'll show you how they work."

Topics

- Line Notes
- Order Notes
- Text Lines
- Documents

Line Notes

Select a line and press the Edit button to open Order Line Properties.

Use the Notes tab to enter notes. Remember that customers will see Line notes and Special instructions.

Enable Display Double-Height Rows to display Special Instructions below each line.

Line notes let you enter details that stay attached to a line item.

Select a line item on a Sales Order and press the Edit button.

Select the Notes tab.

Use the Line Notes section for general information about products.

Put notes intended for the customer or picking staff in the Special instructions field.

Both Line notes and Special instructions appear on printed documentation like Sales Orders or Invoices.

Be aware that customers see these notes.

Internal notes print on pick tickets so only the staff sees them.

Press OK to save your notes. BisTrack shows a note icon on the product line when you enter either line or internal notes.

You can view the special instructions right on the line by selecting the Display Double-Height Rows icon.

Order Notes

Use the Notes button to enter notes that apply to the whole order.

Read More…

Special Delivery instructions appear in the Special Instructions field.

Header Notes and Special instructions print on customer documents.

Internal Notes only print on internal documents like pick tickets.

Sales Order Header notes appear in the header section of printed documents.

Select the Notes button.

You commonly use the Special instructions tab for delivery information.

Notes you enter here appear on internal and external documents.

Use the Notes tab to enter Header and Internal notes.

Remember that Header notes appear on all printed documents, and Internal notes show on pick tickets, visible only to staff.

Select OK.

BisTrack adds an asterisk to the Notes button indicating that this Sales Order had attached notes.

Text Lines

Select the Text Line button to open the New Text Order Line window.

Enter your note in the New Text Order Line window.

Use the arrow buttons to move the Text Line on the order.

You can insert a text line in an order that doesn't connect to a product.

When you add a text line, BisTrack inserts it above the line you select.

Press the Text Line button.

Enter your text into the New Text Order Line window, and press OK.

Your text appears as a new line.

To change the line's position press the up or down buttons.

Documents

Notes appear on the printed Sales Order and Pick Ticket.

On the Sales Order, you can find the Order special instructions and Header notes near the top.

Each line displays their attached notes printed below them, and Text Line notes appear as their own entry.

Customers receive a copy of the Sales Order and can see all the notes that appear here.

The Pick Ticket contains all notes, including the internal only notes that customers won't see.

The Order notes print at the top and the Line notes appear with the corresponding order lines.

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