System Manager Document Controls

BisTrack manages transaction documents printing, including sales orders, purchase orders, invoices, and credit notes, by document control settings. The key to setting the options efficiently starts with the Default Computer. This training course introduces you to document format choices along with the print and report options for the Default Computer. We also show you how these selections work when setting up additional computers.

BisTrack distinguishes document control settings by computer rather than user. The system requires that you establish the settings for the Default Computer first. Then you can refer all other Computers or Terminal Services Clients to the default settings, or you can customize the document controls for each as required. To review or change the document control settings for the Default Computer open the System Manager application. Select Computers from the General navigation pane and open the properties for the Default computer.

BisTrack lists all document types on the Document Control tab. Click the plus icon beside a document type to expand it. You can use multiple document formats with each type of transaction. This allows you to base your printing requirements on specific sale types, and whether it is cash or charge. For example, you could have the Sales Order Confirmation print automatically for a Delivered Cash Sales but for all other sales types, the system prompts you for printing.

Some reports may have less document formats assigned. For example, there are only two for a Cash Sale Invoice. One for printing an invoice to a standard printer and the other a cash register invoice to a slip printer. All others are shown with a red X indicating a document format has not been set. The number of formats available for each document type is controlled by a System Option setting; in this case 8.

All formats can be assigned a name. Unnamed formats are shown with the word "Format" and a number, as displayed here in the Cash Sale Invoice list. The name

is used in most BisTrack displays and drop down lists when selecting a document format.

Below the Format name field, you have Options indicating when you want this document format to print or be available as an option in a Print dialog box. Enabling the check box affirms the option selected. For example, the sales order confirmation is set to print when released, with the user confirming or cancelling the printing. It prints at the branch issuing the order, can be emailed or faxed and is for all sale types. Different document types have different options but the principles are basically all the same.

Refer to the documentation found in the course materials section of Training on Demand for more information on Document Format Options.

The next group are the Print Options. Most BisTrack users do not set up their systems to use Report Server from within Document Controls. We recommend that you leave this setting at Default (from General tab). The Destination selections specify the printer to use.

When you select Prompt for Printer, the system prompts you to choose a printer each time you print a document. When you select Use Default Windows Printer, the system uses the one identified as the default for the user's client machine. A best practice is to not select the Use Specific Printer option. The Use Specific Printer option allows you to choose a specific printer for every time this document prints. For example, you may set this to print all picking documents to the warehouse printer.

When you have multiple branches, set up document control to print certain formats to uniformly identified printers at every location. In this example, we will set a Counter Sales printer for each branch. Specify that all sales orders for all branches should print to the printer specified as Counter Sales in the Branch Printer settings. Refer to the documentation found in the course materials section of Training on Demand for more information on Branch Printers.

Filename is the primary setting of the Report Options. BisTrack uses it to reference the Crystal Report or document template when printing this document

format. For all existing formats, this is already populated with the correct format name. You can choose to print in either Portrait and Landscape Orientation.

You should leave the Parameters field blank; it's not necessary when using Crystal Report templates. The Watermark field is typically populated with the word "Training" in the training database so all documents printed from there are easily recognized. Once you set the Format, Print, and Report options for All Document Reports used by the Default Computer, click OK to save and close the properties.

You must specify any variations in printing specifications on separate Computer's Document Control settings. The more variations you want to use for a given document, the more Computers you'll need to set up in BisTrack. Once the settings are in place for the Default Computer, all other computers or Terminal Services Clients automatically default to the same specifications. You only need to change the Document Control options where you want alternate specifications.

With this scheme in place, we can begin by selecting a Computer. Open the Document Control tab. Expand a Document Report type to show all the formats available for that report. Select a format. Document format options automatically use the options from the Default Computer. To make changes to the options for this computer, remove the check from the box.

All fields are now available. You can disable the Confirm with user on release option and eliminate an extra keystroke when completing a sales order. These changes then apply for anyone that logs into this Computer. Repeat this process for any Document Formats that will be different then the Default Computer. When finished, click OK to save and close the Computer properties.

BisTrack uses Document Control settings to print the transaction documents you want, when and where you want them. In this course, we introduced you to the document Format, Print, and Report options. You should be confident using the preferences from the Default Computer when setting up additional computers.

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