Using Notepad Cases

Notepad Cases allow you to group a collection of Notepad Notes and assign an overall status. They can be used to track any type of communication. However, they are commonly used for invoice dispute resolution, customer service issues, or quote follow up.

This course begins with the set up required to use cases, including Notepad Case Statuses and Reason Codes. Then we'll delve into adding a new case, raising a credit note on a case, and finally closing a case.

A key feature of a Notepad case is the use of a Status. These are user-defined in a System Manager table. From the General view, select Notepad Case Statuses. Each entry consists of a Name and a flag that indicates whether it is open or closed.

A closed status indicates that all communication for a case is complete. You can have a variety of statuses. In this example, we have three different selections for Closed.

To add a status, select New from the right-click menu. Then enter a Name and indicate if it is a closed status. Click Add to finish the entry. When done, click Close.

You may also assign Reason codes to Notepad cases. Create these in advance. From the General view in System Manager, select Reason Codes. With the codes grouped by Type, you can see the Notepad Cases listed together. To add one, right-click and then select New from the pop-up menu. Set the Type to Notepad Case. Enter a Code and descriptive Name for it. Click Add when finished. Add another Reason Code or Close the window.

For this example, we'll create a notepad for an invoice in dispute. Find the invoice and then open the associated notepad. Select the New Case button. Set the header details of the Case starting with the Case status. Select the Open status option from the drop-down.

BisTrack shows the Customer and Sales Invoice details. A Properties button is available for you to view the document details. BisTrack automatically sets the Owned by branch to the Invoice branch. You can change this if a different location will be responsible for the case.

Using the Reason for case dropdown, assign a Reason from the list. You can enter an additional description for the selected reason in the Other reason field, or select a previous entry from the dropdown. Next, add a note for the case.

Enter the details and when finished, click OK. BisTrack shows the note added to the case in the main body of the window. You may continue to add more notes as needed. When finished, click OK to close the New Note window.

Click OK to close the case. The system assigns a new case number. Click OK to clear the message. The Invoice Notepad shows the case in bold letters. It has an Open status and the folder icon flipped forward. As the situation progresses, you would enter all further communication under this case.

To resolve invoice disputes, you may choose to issue the customer a credit. It is possible to do so directly from within an Invoice Notepad Case. Access the case from either the Invoice or the Customer properties. Select the case and then open the Properties. To issue a Credit against the invoice, click the Credit button.

BisTrack starts a New Credit Note for the customer with the invoice details retrieved on the Lines tab. Select a Reason for the return and then open the Lines tab. The system automatically credits the entire invoice. Make any changes as needed, and then Complete the credit note. BisTrack links the credit note details with the invoice.

Once you resolve the case, you can close it. Let's continue with the disputed invoice example and change the case from an Open to a Closed status. Select OK to finish the entry. Choosing a closed status automatically generates a System type notepad entry. You can enter further text in the Subject or Note area as needed. When finished, click OK. The system shows the closed case on the customer's Notepad with a strike through and closed-file folder icon with a green check mark.

Notepad cases are an efficient method of entering and monitoring a collection of notes under a specific status. We reviewed the System Manager tables for Notepad Case Statuses and Reason Codes. Then you were shown how to add a new case, create a credit note and finally, close a case.

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