# Options and Notes Tabs

BisTrack gives you many options that simplify and control how you interact with Customers. In this course, you will learn about some of the more commonly used settings from the Options tab including credit controls, customer references, contact verification, and order controls. Then we'll show you how to set up special instructions using the Notes tab.

Four settings on the Options tab provide additional credit controls. Let's have a look. Select a customer to view their Properties and then open the Options tab. The default for each Credit Control option is zero or not set.

You can determine and enter a Maximum sales order value and sales order percentage as necessary. When a customer places an order that exceeds these values, the system puts their order on hold unless you get an instant release code from the Credit Controller or turn it into a cash sale.

The next two options provide some leniency on credit limits.  A credit limit extension allows a customer to exceed their limit by the percentage entered. BisTrack will not refer orders below the hold threshold amount to credit control, even if the customer is over their limit. Setting any of these Credit Control options for a customer overrides the System Option settings.

Typically, references contain your customer's purchase order number used to authorize and track the products they buy from you. The Reference required drop-down gives you two options. Select No if you don't require a reference, or Yes if you do. The Yes (warn if duplicate) option creates a warning message if the same reference is used twice.

When you choose Yes (select from list), you'll access the References option to enter purchase order details. This is helpful when a customer mandates the use of only certain PO numbers, and also to set a maximum amount per PO. A customer can have multiple References on file. Each reference gets a Description, Effective and Expiry Date, the Maximum PO, and Transaction Amount. You must pick the

Reference during order entry and the system ensures the order meets those guidelines.

When References are required, and your customer has a specific format that it must match, you can set the masking. Click the Click here for more information box to see how to do this. For example, when creating a mask for a customer whose purchase order numbers always begin with the number nine plus any four digits, you would enter nine and then four hashtags.

When you set the Line reference required option to Yes, BisTrack requires you to enter a reference for each line on a sales order. But how do you know that a Customer reference is required on a sales document? Look for a red dot shown beside the Customer ref field name.  Hovering the pointer over the field shows the mask setting. You can also click on the dot for instructions on how to enter a reference for this customer.

Now let's review the Order Options related to contact verification. This option determines if a contact is required. When you select No, you're not required to enter a contact. Choosing the Yes (contacts shown) option makes the Contact field mandatory. You can choose from the list of names available and view their ID.  The Yes (contacts hidden) option also makes the field mandatory. However, BisTrack does not show the list of contacts.

This setting forces the sales person to enter the correct name versus picking one from a list. When the Enforce entry of contact and telephone in order entry option is set to Yes, you must enter this information or you will not be able to complete the order. It's common to use this option as it forces the entry of contact details but does not require that they already be on file.

If the contact is not on file, you will be able to add them on the fly. This applies to all sale types except Quick Sales. BisTrack treats Quick Sales separately. This option allows you to enforce contact entry specifically on Quick Sale orders. It is often used in conjunction with the previous option, or used in its absence so that a contact is only required for in-person sales.

When contact information is required In sales entry, both the Contact name and telephone fields have a red dot adjacent to the field names to indicate that these fields are required. Select a contact from the drop-down. When the Contact has a phone number, the system displays it automatically.

Clicking the ID button displays the contact's photo and signature on file. If there are no contacts on file, but one is required, you can add one by clicking the new Contact icon.

Let's examine a few more frequently used order control Options. You can have orders automatically emailed and/or faxed on completion. The system uses the option Check for existing quotes and orders to provide a quick view of the order activity each time an order is entered. For this to work, you must also have the Operational, Orders – Behavior system option that checks for open orders and quotes set to Yes.

The system displays a pop-up window when you start a new order.  You can continue with the new document or open an existing one. This next option checks for existing open order lines when adding products.  This prevents duplicate orders of the same product for the same customer. The settings include checking at the customer Job level.

When a product is added that is already on an open order, the system displays a product warning message. Some customers prefer to see pricing per Each used for tallied and sheet products on their sale documents, rather than MSF or MBF. When this option is set to Yes, the system converts to Each pricing whenever possible, regardless of the UOM Sell settings.

Notes can be used to pre-set information you want automatically added to a sales order or to have a popup note displayed. From the Customer properties, open the Notes tab. Enter the text into a Special Instructions box that you want copied onto all sales documents. For example, a customer that wants you to use a certain delivery entrance or have a specific person sign for orders could be entered here.

Enter miscellaneous information about the customer in the Notes text box. This information remains on file until you change or erase it. Use the Popup Text option to enter a message or instructions that you want displayed when the customer is selected on a sales document. You may enter Popup text using HTML or Plain text.

For Plain text, enter the message in the box and then set the show dates. Click OK to save the note. Once you have added Notes to a customer's account, the tab is displayed with a special icon. Save and Close the customer.

We'll start a new order. The system displays the Popup Text immediately. After you read it, you can close the window. The system displays an asterisk on the Notes button indicating that there are instructions. Clicking the button or pressing F9 shows the pre-set text from the customer's account.

BisTrack provides many ways for you to specify how you and your customer will work together. We examined several settings on the Options tab including credit controls, customer references, contact verification, and order controls. Finally, we showed you how to add special instructions and popup text on the Notes tab.

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