

## What's New- Customer Delivery Notification Transcript

One of the methods that you can use to keep your customers informed of delivery status is by using email notifications. You can set up BisTrack to send them automatically when a delivery is marked in progress or delivered, and whenever the delivery ETA changes. To send these notices, you need to add Email Templates, perform the Report Server setup, and then set Customer and System Options. Let's examine how to complete these tasks and then we'll review the work processes that trigger when the system sends the notifications.

Each type of notification requires an Email Template that contains the message details. From System Manager, open the Reports view and then Email Templates. Right-click the blank area and select New from the menu. Begin by selecting the Delivery Notification Type from the drop-down list. Enter a Name and Subject for the Template. You can use the same text for both.

Set the formatting options as desired. Enter the message text. You can reference fields from the order and delivery documents by enclosing the fieldnames within percent sign symbols. A Best Practice is to include the Transaction number, ETA, and Delivery Date, as appropriate. Consult BisTrack Support for assistance using fieldname references.

When finished with this template, click Add. You'll need a separate template for each of the three notifications. Continue to add one for Orders Marked Delivered and for Delivery ETA Changed. When finished adding templates, click Close.

When you finish the templates, add them to the Report Server. Here's how. Open the General view and then the Options Taskpad. Select Report Server Setup.

On the Notifications tab, choose the Email template for the Delivery options from the corresponding drop down menus. To send a copy of the sales document with the email, select the Format from the dropdown list. The most commonly used formats include Sales Order Confirmation and Delivery Notification. Click OK to save the Report Server settings.

Let's begin with the Customer Option settings. With this setting, you're telling the system to send notifications to the Customer Contact chosen on each sales order. To ensure that you select a Contact, set the option Enforce entry of contact and telephone on Delivered orders, to Select existing contact.

Next choose the notifications that you want to send by Contact. Open the Contacts tab and select a Contact. Click the Properties button. Now, open the Notifications tab. Note that this tab is only available if the setting was changed to Select existing contact. There are three notifications that you can enable, including Delivery marked in progress, Order marked delivered, and Delivery ETA changed.

You should confirm that any Contacts you selected to receive notifications have a valid email address entered on the General tab. Enable the Notifications for each Contact that should receive them. When finished, click OK to close the Contact properties, then Save and Close the Customer.

There is one System Option that you need to set to use notifications. Expand the Operational section, and select Delivery. For the Automatically send delivery notifications by email option, select Yes. Click OK to save the changes and close the System Options.

The system automatically sends an email delivery notification to a Customer Contact when a delivery is marked In Progress, an order is marked Delivered, and when the Estimated Time of Arrival changes on a Delivery marked In Progress. This sales order has a Contact name selected. The red dot beside the name indicates that this is a mandatory field.

The order is now on a Dispatch Delivery. Select the Delivery Manifest, open the right-click menu, and choose the Mark In Progress option. Depending on your system set up, you can print the delivery documents at this time. Doing so marks the order as delivered.

Marking a delivery as In Progress and marking an order Delivered triggers the email notifications. Here we see a sample of the Customer Contact's Inbox with

the Subject from the Templates shown in the preview area. We'll open the Delivery in Progress email.

You can see the text from the Template with the references included in the body of the message. The Sales Order Confirmation is included as a PDF attachment. With the same manifest open, let's change the delivery time. We'll change the Start and Started at times and then click the Start button. Upon saving and closing the manifest, the system sends an email to the Customer Contact. The email message appears with the new estimated time of arrival and the sales order confirmation attached.

Notifications are a great way to keep customers informed of their order delivery status. With the Email Templates created and Report Server configured, Customer and System Options set, BisTrack sends email notifications automatically, without any additional effort on your part.

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