

Supplier Notes and Notepad Tabs

Andrew

“Hey Robert, this Supplier Invoice doesn’t seem right... What should I do about it?”

Robert

“You should give them a call, but first let’s open a Case in the Supplier Notepad.

BisTrack makes it easy for us to track Notes and Cases with our Suppliers.

Select a topic and we’ll get started.”

Topics

- Notes Tab
- Notepad Tab

Notes Tab

Use the Notes tab in Supplier Properties to manage notes that appear on Purchase Orders.

[Read More...](#)

You can also create Popup Text notes that display when you create a Purchase Order for the Supplier.

BisTrack allows you to store notes on Suppliers using the Notes tab in Supplier Properties.

Notes entered on this screen appear on the Purchase Order.

Use the icon under the field labels to insert the current Date or add both the Date and Time.

Use the Popup Text button to create a popup that appears when a Purchase Order is created for this supplier.

Choose Plain text or HTML to use for your Popup Note.

Enter your text in the box, or use the Clear button to remove any existing text.

The Preview button displays the Popup Text as currently entered.

Set a Popup show start and stop date to limit to show only during that date range.

Notepad Tab

Log Notes and Cases on the Notepad tab of Supplier Properties.

[Read More...](#)

Enable the Follow up option to have BisTrack send a reminder to a user.

You can connect Cases to Purchase Orders, Call Off POs, and Supplier invoices.

Use the Notepad tab to create Notes and Cases for your Supplier.

Logged Notes and Cases display here.

Select the Add button to enter a new Notepad Note.

Enter the Subject, Type, and Contact as needed.

You can tell BisTrack to send a reminder by enabling Follow up.

In the fields that appear, select a Date and User for BisTrack to notify.

Enter your text into the field, and use the Attachments tab to include related files.

Press OK to save.

The Notepad Note appears in the list.

You can also create and track Cases on the Notepad. Select the Add Case button.

Assign a Case status using the dropdown.

If there is a related Purchase Order, Call Off PO or Supplier Invoice, connect it to the Notepad Case using this button.

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