Supplier Notes and Notepad Tabs

<mark>Andrew</mark>

"Hey Robert, this Supplier Invoice doesn't seem right… What should I do about it?"

<mark>Robert</mark>

"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.

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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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Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298