What’s New 5.0 – Sales Order Entry

Worker: “Alright, time to get these orders in! …wait a minute... I need to add a note, ummm, where did that tab go?”

Narrator: “With the 5.0 update, we made some changes to the Sales Order Entry screens. Let’s walk you through it and you can see how much easier the process is now!”

Topics

- Layout update
- Navigation Update
- Function Update

Layout Update

- Header options removed.
- Tools dropdown menu added.
- Customer and Notes tab replaced with buttons.
- Order Lines visible in all tabs.
- Some fields moved to the Instructions Tab.

BisTrack 5.0 includes some layout changes designed to streamline the user interface. We changed some of the tabs to buttons and moved a few fields

We removed header options (File, Menu, Tools, etc.) from the top of the window and added a Tools menu to keep those functions handy.

Any Smart Objects that you’ve created for Order Entry will appear here.

The lines section now remains visible regardless of the header tab you selected.

We’ve removed the Notes and Customer tabs, replacing them with buttons.

Click the Customer Properties icon to access customer information.

You can click the Notes button, or press F9, to see any Notes related to this order.

We moved four fields from the General Tab to the Instructions tab. These include: Currency, Yard Book Ref, How Placed, and Date Requested.

These changes to Sales Order Entry keep more information and options readily accessible to you throughout the sales process.

Navigation Update

BisTrack 5.0 has some navigation shortcuts, and a few additions to the Other Options menu.

Keyboard and Button Shortcuts

Added Keyboard shortcuts to complete an order by pressing F12 or Alt+M.

Added Buttons to access Open Customer Notepad, Customer Properties, Add New Addresses, or Open Address Properties.

Notes and Other Options Buttons

Notes Tab has been replaced by Notes button.

Other Options Button added to access more functions.

Watch this video for a guided tour of new buttons and shortcuts.

Release 5.0 has some navigation enhancements to help you create BisTrack Sales Orders.

Now instead of pressing the Complete button, you can also press F12 to complete the order.

You can also use the key combination of [Alt + M] to perform the same function.

We added several icons next to the Customer and Deliver To information fields to make it easier for you to open Customer Notepad, Customer Properties, Add New Addresses, and Address properties.

We replaced the Customer *tab* with the Customer Properties *icon*.

We also replaced the Notes *tab* with a Notes *button* beneath the order lines viewer. When you add a note to an order, BisTrack puts an asterisk on the button.

When you select the Other Options button, BisTrack opens a window with a variety of functions.

Choose the one you want to perform by pressing the button, or the corresponding function key if one is available.

This update makes it easier for you to navigate the process of creating Sales Orders and keeps the functions you need right at your fingertips.

Functions Update

Explore the highlighted changes and review the associated text. Select the Show Me button for a video overview.

The Order Lines section will remain visible, even when you move to other tabs.

You can now select your Method of Entry by a dropdown next to your product lookup.

You can use the Form Designer in the File Menu to customize the section below the lines to show additional information on the selected lines.

BisTrack 5.0 includes several new features that help streamline the Sales Order Entry process.

You can now use the same interface for all Sales Entry Documents including Quotes, Reservations, Call Off Orders, and Template Orders.

The order lines remain visible when you change header tabs between General, Additional Cost/Charges, and Instructions.

The Method of Entry can be set by clicking the dropdown and selecting Quick Entry, Qty and Price or Qty Only.

With BisTrack 5.0 and higher you can customize this section with Form Designer. This lets you display additional information for a selected order line such as: Actual Stock, Standard buy price, or Standard margin.

These changes help streamline the Sales Order Entry process and keep information at your fingertips.

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