What's New 6.0

On BisTrack 6.0 and higher, we added System Options that help you control Deposits on Account Orders and manage days marked as full in Dispatch and Delivery.
Choose an option, and we'll give you the run-down.

Topics

- Entering a Deposit on an Account Order

- Advanced Journey Date Full Management

Entering a Deposit on an Account Order

With BisTrack 6.0 and higher, you can take deposits on orders that are not flagged as cash sales.
The deposit works like it would on a Cash sale, and BisTrack treats any Outstanding amount as an accounts receivable order.
In Customer Properties on the Financial tab, you see the On order amount for the completed order.
The amount entered as a deposit adjusts the Unapplied cash and credits, Net Balance, and Amount owing totals.
The Available credit reflects the amount outstanding from the order.
After you invoice the order during the Cash Matching process, the payment automatically matches the invoice when selected.
Enable this feature within System Options.
Select the BisTrack Accounts group under Financial.
Set the option Allow taking deposits on AR sales order to Yes.

Advanced Journey Date Full Management

BisTrack 6.0 and higher gives you advanced options for marking delivery dates as full in Dispatch and Delivery.
Read More…
Along with this, you can allow or prevent orders from being completed when the Required Date is marked as full.

With BisTrack 6.0 and higher, you can select an advanced option for marking a delivery date as full in Journey Planner.

You set this function in System Manager under the group Operational, and then Journey Planner.
The option defaults to Simple.
If you change it to Advanced, you can mark specific vehicles and times as full, and the Unmark Day Full right-click option no longer appears in Journey Planner.
To mark days as full, select a date in Journey Planner and open the right-click menu.
Choose the option Mark Day as Full to open the Mark Full list.
Use this screen to add, view, and edit items that have been marked as full.
Adjust the search criteria to narrow your search.
With the Advanced method enabled, you can use the Add button to select any combination of Date, Branch, Vehicle type, or time to Mark as full.
Press Close when you're finished.
BisTrack adds your selection to the Mark full list.

You can also set the option so that it prevents BisTrack from completing a Sales Order if the Date Required is Marked as Full in Journey Planner.
As before, you'll need to set this function in System Manager.
Under Operational: Orders – Behavior. It's the Allow completing delivered orders when date required is marked full in journey planner option.

If you set this to No, BisTrack presents a warning window that appears when you complete a Sales Order where the Date Required is Marked as Full.

The warning asks you to set the Date Required as the next available date.

Choosing No returns you to the previous screen where you must set a new Date Required before you can Complete the order.

When you set this option to Yes, BisTrack shows a warning that the date is marked as full, but allows you to complete the order.

Selecting Yes changes the Date Required to the suggested date.

Choosing No leaves everything as entered and completes the order, ignoring the Marked as Full option in Journey Planner.

Cancel returns you to the previous screen to make changes.

These advanced options give you more control in managing your delivery plans.

Assessment

Question 1

Select an answer and press Confirm.

Chris sets the Allow taking Deposits on AR sales order System Option to Yes.

The Deposits and Payments function appears where?

ANSWERS

- The Home tab Ribbon

- the Sales Order General tab

- the Sales Order Tools menu (CORRECT)

- the Other Options menu on a Sales Order

The Deposits and Payments function appears in the Tools Menu of a Sales Order.

Select an Answer and Press Confirm.

Question 2

Select the function for the System Option and press Confirm.

Jim set the System Option Allow mark Journey Dates full to Advanced.

How does this affect Sales Orders?

Answers:

- You cannot complete Sales Orders for a required date that is marked as full

- BisTrack Automatically assigns the next available Required By date for Sales Orders

- This System Option does not affect Sales Orders (CORRECT)

- You can schedule Sales Orders for days marked as full

Allow mark Journey Date full option enables additional controls in Dispatch and Delivery.

This option does not affect Sales Orders.

Select an answer and press Confirm.

Results

PASS: You passed the What's New 6.0 course. Good work.

FAIL: You missed something. Press the home button and pick a topic to review. When you're ready to try the quiz again, select Show Me What You Know.

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