

Tag-n-Trak Notes Setup

There are several places in Tag-N-Trak that a user can setup notes. Except for system generated notes, they are for reference only, no actions are taken by the software based on notes. Below is a table of notes and their corresponding locations. These notes are discussed together, instead of separately, because of their potential interdependent relationships.

<u>Note</u>	<u>Program</u>	<u>Screen</u>
order noTes	Point of Sale	Order Heading screen
Sales notes	Point of Sale	Line Items screen
cust Notes	Point of Sale Accounts Receivable	Order Heading screen Customer Master screen
Inv notes	Point of Sale Inventory Inventory Purchasing	Line Items screen Item Master screen Create/Edit Line Item screen
Line notes	Inventory Purchasing	Create/Edit Line Item screen

These notes have several features in common, which will be discussed below, then the features that are unique will be addressed in the order shown above.

Common Features:

- All notes can be found in their respective screens by pressing the **[F12]** key to bring up the **Action** menu. Press the highlighted letter of the desired note, show in the above table, or use the **[↓]** key and press **[Enter]**.
- All notes are tracked by their **SEQ** number. The **SEQ** number increments by 10. Inserting new notes between existing ones can be done by entering an appropriate **SEQ** number. The **PRTF** column stands for Print Flags. The available options are shown below. They can be used in any combination, and in any order. If the note is to appear on the screen only, leaving the **PRTF** column blank is acceptable. The Print Flags only control where, or *if*, the note prints. Press **[Enter]** to leave the **PRTF** field.
 - P** Pick Ticket
 - I** Invoice
 - Q** Quote
 - L** Job Label (not available on order noTes)
- Type in the desired message in the **Information** field. If the message is longer than the line in the box, the text will wrap. Any print flags associated with the first

Tag-n-Trak Notes Setup

SEQ number copy automatically to the second **SEQ** number, even if the cursor moves down to a new **SEQ** number. The print flags can be changed if needed by **SEQ** number.

4. To delete a line of notes, place the cursor on the **SEQ** number that is to be deleted, and press **[F6]**. There is now a gap in the **SEQ** numbers of notes. When the note is called back up, the **SEQ** number will have a numeric gap. Manually adding a missing **SEQ** number is done by arrowing down to a blank **SEQ** number, arrowing up to the **SEQ** field, then typing in the missing **SEQ** number.

Order Heading Notes:

5. Order Heading Notes apply to the whole order. They print at the top of the body, before any item numbers. They can be a reminder to the electrician, a return policy, a package upgrade policy, etc. The word **NOTE** will appear on the Order Heading screen above the order type, indicating there is an Order Note associated with the order currently called up.

Sales Notes:

6. Sales Notes apply to one item number on one ticket. They can be a reminder to the electrician about this particular item, any unique feature of installation, like an extended down-rod, a special order return policy, etc. Sales Notes can optionally appear in the **Info** field in the POS Line Items screen.
7. Sales Notes have a **PO** flag that controls whether the note prints on the **PO**, the **Receiving** report, or **Both**. The flags are **P**, **R**, or **B**, respectively. Leaving the **PO** flag blank will cause nothing to print.
8. Sales Notes have a **C** flag that controls which Inventory Notes get copied over to the Sales Notes. Enter a **Y** into the field on a **SEQ** number by **SEQ** number basis to make it copy. If there are several Inventory Notes setup to cover several situations, then the salesperson can optionally choose which are applicable to this sale.
9. In the POS Line Items screen, when the note is complete, there are several options to save the Sales Note. Press **[F3]** to save the note and sell the associated item if it is not on the order yet. Press **[F10]** to save the note if the item is already on the order. Press **[F10]** to save changes to a previously existing note. The note on **SEQ** number **10** can optionally appear in the POS **Info** field, and is discussed later.
10. Sales Notes can be created from the POS Items screen by entering appropriate data into the **Info** field. The field to the right of **Info** is for the print flags. This note will be stored in **SEQ** number **10** and move any previously existing notes down.

Tag-n-Trak Notes Setup

Customer Notes:

11. Customer Notes can be setup in the Customer Master screen or the POS Order Heading screen. Customer Notes are associated with every order opened under this ID. Once setup, the word **NOTE** appears at the top of the Customer Master screen, and the POS Order Heading screen, and a **READ NOTES** message appears in POS when calling up an order under this ID if the salesperson has permission to read the note(s). Customer Notes do not have the ability to print anywhere.
12. Access to Customer Notes is controlled by permissions in the A/R Salesperson screen. There are nine levels of Customer Notes (1-9). Higher levels indicate higher information sensitivity. Salespeople can read notes up to and including the level indicated on their screen. Uses for Customer Notes include beeper and cell phone numbers, home phone numbers, collection information, etc. It is up to management to decide the sensitivity level of the information.
13. The **Msg** flag in Customer Notes allows the user to categorize their notes. It is an alpha-numeric field. Several notes under different categories can be created and scrolled through by pressing **[Page Down]**. They will appear in the order in which the notes were entered. Press **[F10]** to save a note.

Inventory Notes:

14. Inventory Notes can be found in the POS Line Items screen, the Item Master screen, and the Create/Edit Line Items screen in Inventory Purchasing. They apply every time this item number is sold on an order. They can be used for a reminder to the electrician or salesperson, or a feature that is specific to this item number. On the Main Inventory screen, the word **NOTE** appears on the top of the screen to indicate a Inventory Note exists for the item number called up. On the Create/Edit Line Items screen, an **INV NOTE** message appears at the bottom of the screen when a line item is called down.
15. Inventory Notes has a **D** flag that controls the display characteristics and how the note is automatically transferred to POS. The options for the **D** flag in Inventory Notes are shown below. The **D** and **M** options can be setup with several **SEQ** numbers, they can be scrolled through in the POS **Info** field by using **[Page Down]**. The current **SEQ** number called up will be the one automatically copied to the Sales Notes into **SEQ** number **10** when the item is either sold, using the **[F3]** key, or when the change to the existing item on the ticket is saved off using the **[F10]** key.

Tag-n-Trak Notes Setup

- D** Display in POS **Info** field, and auto-copy to Sales Notes, can optionally change or overwrite at any time.
 - A** Auto-copy to Sales Notes starting at **SEQ** number **20**, doesn't display in POS **Info** field, but can edit later.
 - M** Message only, displays in POS **Info** field, but doesn't auto-copy to Sales Notes.
 - blank** Notes don't display in POS **Info** field, still available for lookup and manual copy, but no automatic functions
- If there are multiple Sales and/or Inventory notes, they can be accessed from the **Info** field in the POS Items screen by pressing [**Page Down**]. This will scroll down through all **SEQ** numbers that have notes, and then go back to **SEQ** number **10**.

Line Notes:

16. Line Notes apply to a specific line on a specific PO. The system automatically generates Line Notes when a Customer Back Order from POS is picked up on a PO. The system generated Line Note has the POS information required to automatically fill the CBO at receiving time, like Customer ID, name, and order number. Manual Line Notes on a PO can be created, but they won't function like system generated ones.
17. The acceptable print flags under the **PRTF** columns are **P** for printing on the **PO**, and **R** for printing on the **Receiving** report. Use **P** and **R** to print on both the **PO** and **Receiving** report. The **B** for **Both** option is not available here, as in Sales Notes