

Bundling/Unbundling

Bundling

The Bundling feature of Shortcuts allows you to combine two or more products into a single bundle package. This package is treated like any other product in Shortcuts, allowing you to set buy and sell prices, tax rates etc. for the bundle package and sell it at the Point of Sale as normal. This provides you greater flexibility at the Point of Sale and more accurate reporting!

There are two main steps involved in setting up bundles:

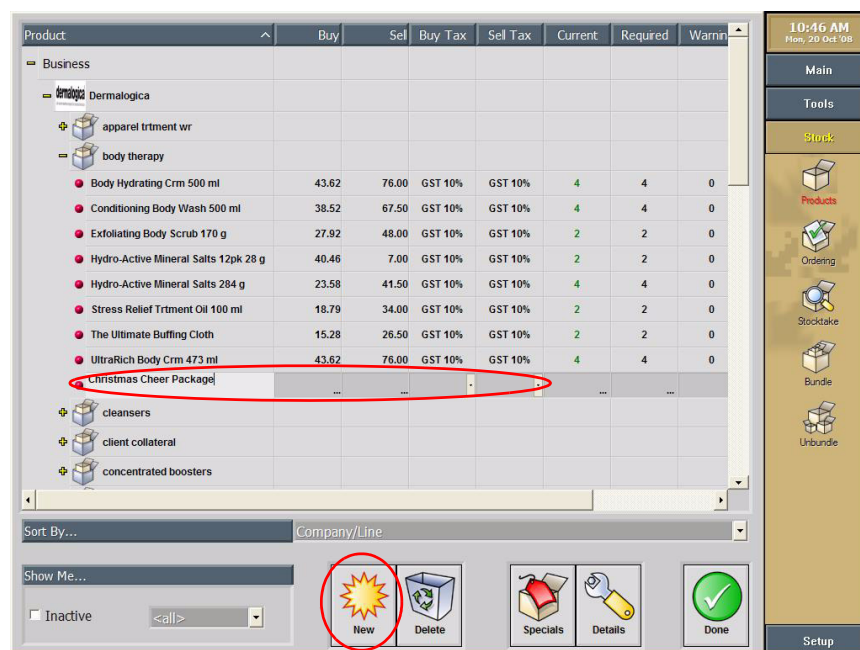
- **Creating the Bundle Package**
- **Assigning Products to the Bundle Package**

Each of these steps will be covered in further detail below.

Creating the Bundle Package Stock Menu (Navigation Bar) → Products Icon


Bundle packages are created like any other normal product:

1. In the Products screen, click and scroll to select Company/Line from the Sort By drop down list. The Product list will be sorted by companies.
2. Double-click on the relevant company. The lines within that company will be displayed.
3. Click to select the line you want to add the bundle package to.
4. Click the New button. A new entry will appear at the bottom of the Product list and the Name field (<New Product>) will be highlighted.

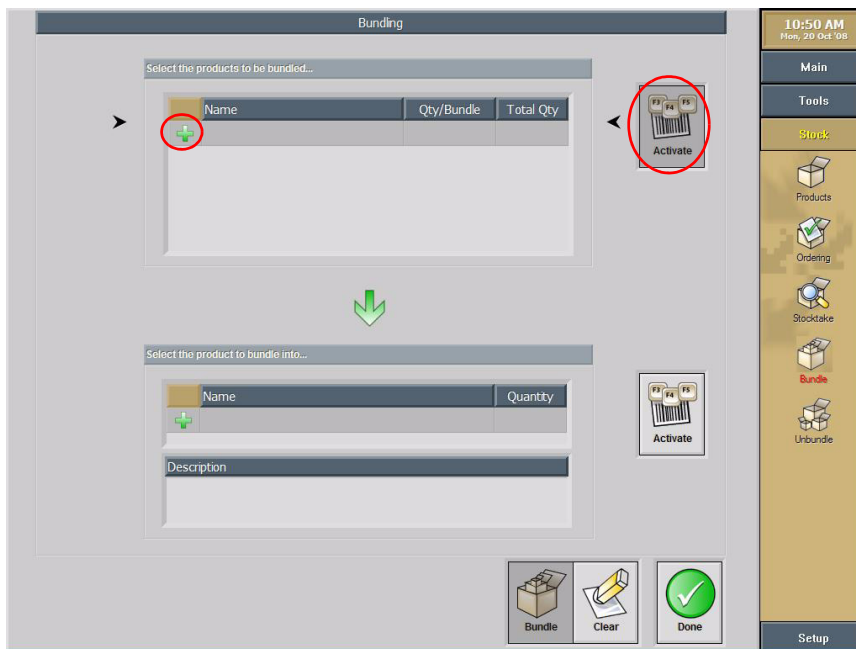


5. Using the keyboard, type in the new product name (e.g. Christmas Cheer Package).
6. Press Tab to move to the Buy field. Type in the Buy price for the bundle package (this may be 0 if you are creating the bundle package from other products).
7. Press Tab to move to the Sell field. Type in the Sell price for the bundle package.
8. Press Tab to move to the Buy Tax field. Click to select the appropriate tax rate from the drop down list.
9. Press Tab to move to the Sell Tax field. Click to select the appropriate tax rate from the drop down list.
10. You have finished creating your new bundle package! You now need to assign products to the bundle package.

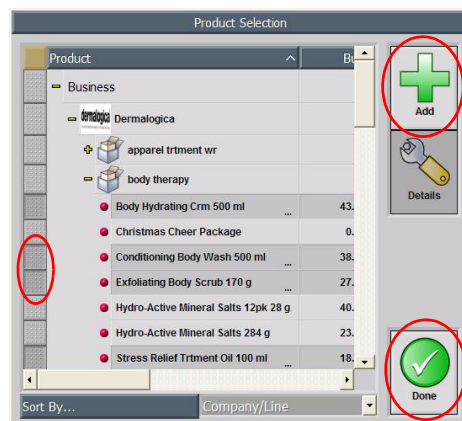
Assigning Products to the Bundle Package Stock Menu (Navigation Bar) → Bundle Icon

 Click the Clear button to remove all selected products from the screen.

1. In the Bundling screen, ensure that the top Activate button is selected (i.e. greyed out).



2. Click on the green '+' sign in the Select the products to be bundled... section. The Product Selection window will appear.

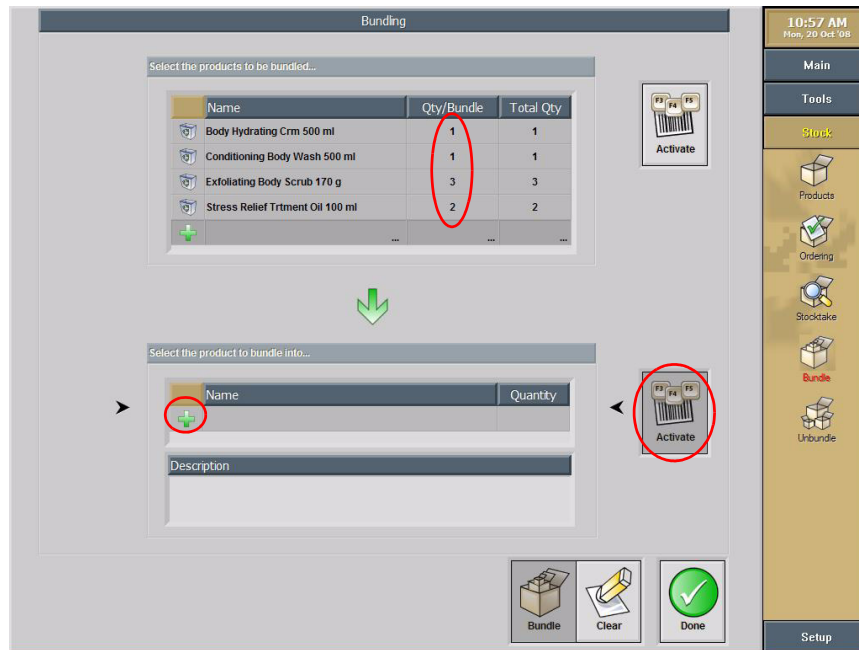


3. Click on the yellow '+' sign to expand the relevant Company and Line the relevant products belong to.

4. Using the drag bar, click to select the relevant products (they will be highlighted), then click the Add button.

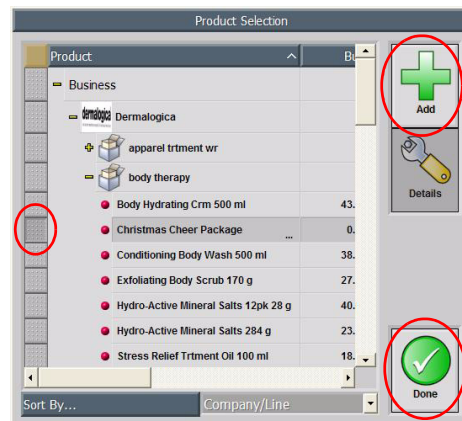
5. Click the Done button to return to the Bundling screen.

- To adjust the quantity of the product(s) put into each bundle, click to select the Qty/Bundle field beside the relevant product(s), then type in the new quantity.



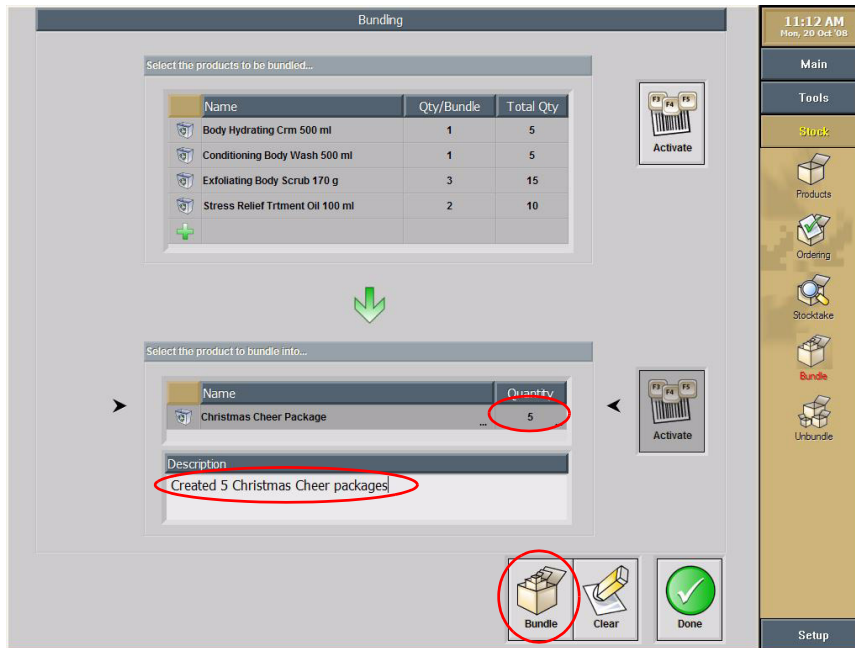
You can also use the Product Search feature to add products to the bundle, or just scan the product's barcode. Scan the barcode multiple times to increase the quantity of a particular product.

- Click on the bottom Activate button.
- Click on the green '+' sign in the Select the product to bundle into... section. The Product Selection window will appear.



- Click on the yellow '+' sign to expand the relevant Company and Line the relevant bundle package belongs to.
- Using the drag bar, click to select the relevant bundle package, then click the Add button. You will be automatically returned to the Bundling screen.

11. Click to select the Quantity field for the bundle package and type in the number of bundle packages you want to create. Depending on the figure entered here, the Total Qty fields for the individual products will also be updated.



12. If you want to enter a description for the creation of this new bundle package, click to select the Description field and type in a short note. This note will be displayed in the Stock Movement History report.

13. Click on the Bundle button to finish creating your Bundle package.

i *Stock levels for the products to be bundled will be adjusted automatically. For example, if you had 10 products in stock and put 1 product in each of three bundles, the product stock levels will be adjusted to 7.*

Unbundling

The Unbundling feature of Shortcuts allows you to split a single bundle package into two or more products for sale separately. The Unbundling feature is normally used when a supplier sends you a pack containing two or more products and you wish to sell each of the products separately (e.g. a product pack contains a shampoo, conditioner and colour, and you want to sell each separately). You can also use the Unbundling feature to unbundle packages you previously created if they are no longer needed.

There are two main steps involved in unbundling products:

- **Creating the Bundle Package (if required)**
- **Extracting Products from the Unbundle Package**

Each of these steps will be covered in further detail below.

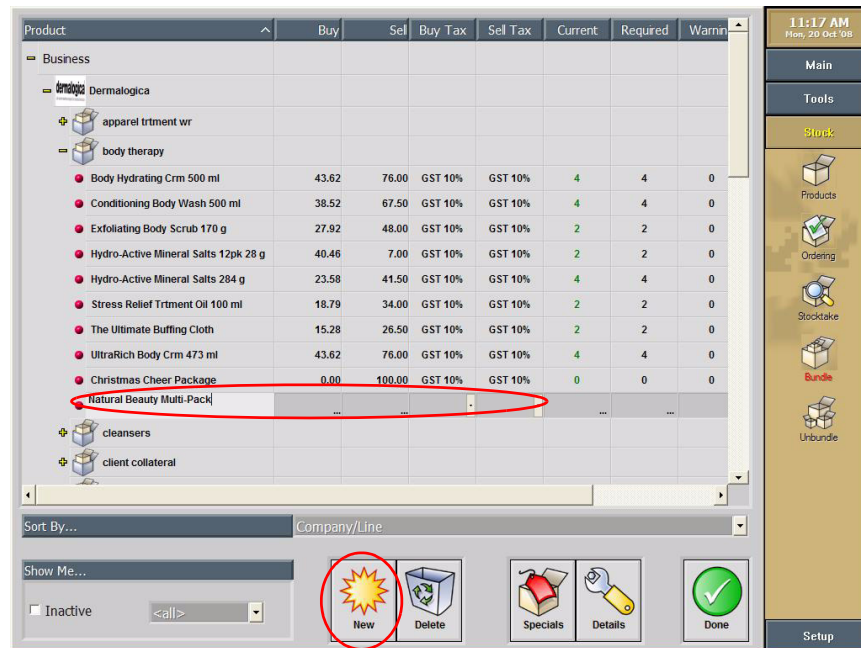
Creating the Bundle Package (if required)

Stock Menu (Navigation Bar) → Products Icon

Bundle packages are created like any other normal product. **Note that if you are unbundling a bundle package which you have created yourself, you may skip this procedure.**


1. In the Products screen, click and scroll to select Company/Line from the Sort By drop down list. The Product list will be sorted by companies.
2. Double-click on the relevant company. The lines within that company will be displayed.
3. Click to select the line you want to add the bundle package to.

- Click the New button. A new entry will appear at the bottom of the Product list and the Name field (<New Product>) will be highlighted.

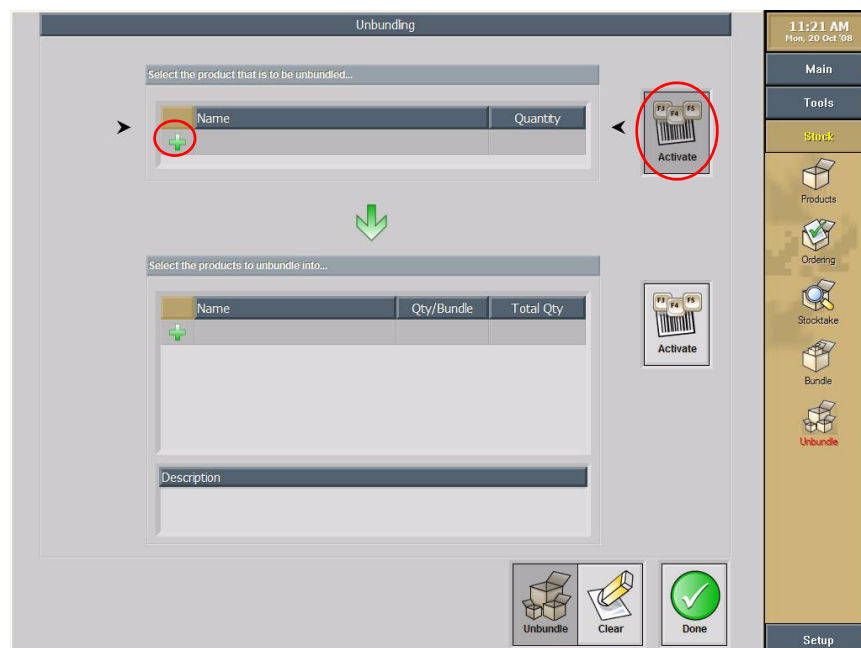


- Using the keyboard, type in the new product name (e.g. Natural Beauty Multi-Pack).
- Press Tab to move to the Buy field. Type in the Buy price for the bundle package.
- Press Tab to move to the Sell field. Type in the Sell price for the bundle package (this will usually be 0).
- Press Tab to move to the Buy Tax field. Click to select the appropriate tax rate from the drop down list.
- Press Tab to move to the Sell Tax field. Click to select the appropriate tax rate from the drop down list.
- You have finished creating your new bundle package! You are now ready to extract products from the bundle package.

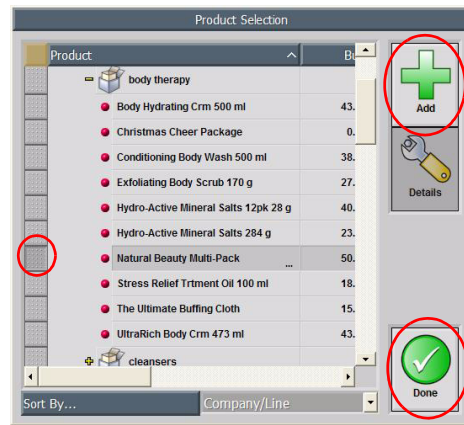
Extracting Products from the Bundle Package Stock Menu (Navigation Bar) → Unbundle Icon

 Click the Clear button to remove all selected products from the screen.

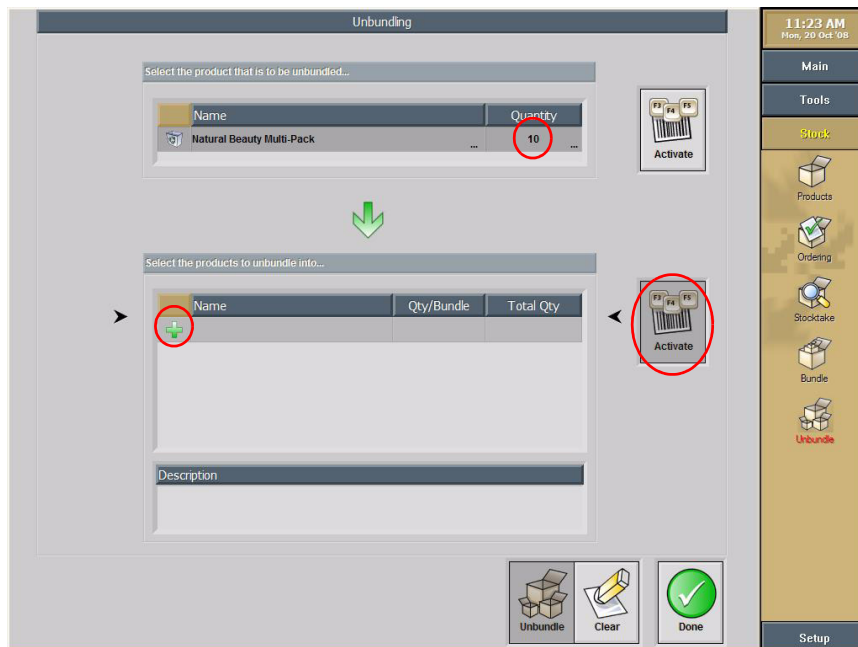
- In the Unbundling screen, ensure that the top Activate button is selected (i.e. greyed out).



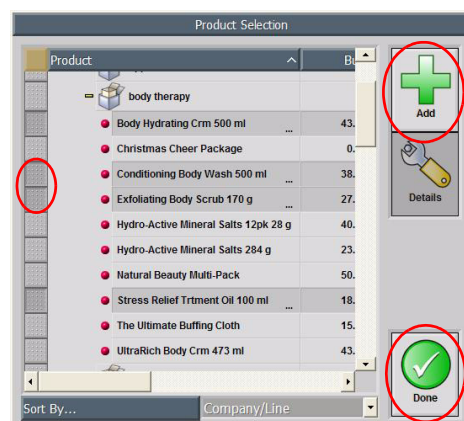
- Click on the green '+' sign in the Select the products that is to be unbundled... section. The Product Selection window will appear.



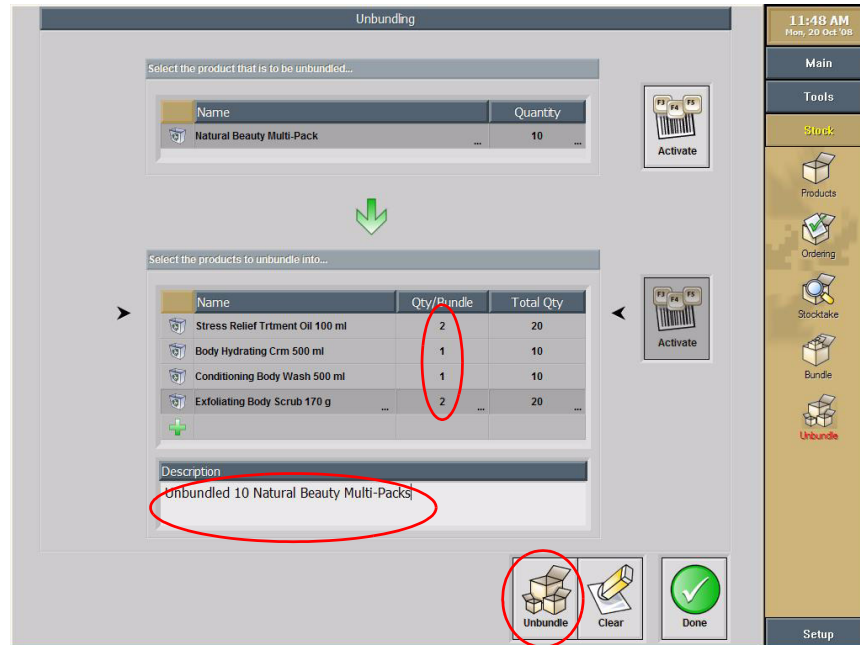
- Click on the yellow '+' sign to expand the relevant Company and Line the bundle package belongs to.
- Using the drag bar, click to select the bundle package (it will be highlighted), then click the Add button. You will be automatically returned to the Unbundling screen.
- Click to select the Quantity field for the bundle package and type in the number of packages you want to extract products from.



- Click on the bottom Activate button.
- Click on the green '+' sign in the Select the products to unbundle into... section. The Product Selection window will appear.



8. Click on the yellow '+' sign to expand the relevant Company and Line the relevant products to be unbundled belongs to.
9. Using the drag bar, click to select the relevant product(s), then click the Add button.
10. Click the Done button to return to the Bundling screen.
11. To adjust the quantity of the product(s) extracted into each bundle, click to select the Qty/Bundle field beside the relevant product(s), then type in the new quantity. Depending on the quantity of bundle products you are unbundling, the Total Qty fields for the individual products will also be updated.



You can also use the Product Search feature to select products to extract from the bundle, or just scan the product's barcode. Scan the barcode multiple times to increase the quantity of a particular product.

12. If you want to enter a description for the creation of this new unbundled package, click to select the Description field and type in a short note. This note will be displayed in the Stock Movement History report.
13. Click on the Unbundle button to finish unbundling your products.



Stock levels for the products that were unbundled will be adjusted automatically. For example, if you had 2 products in stock and unbundled 5 bundles (with each bundle containing 2 products), the product stock levels will be adjusted to 12.