

# How to Create and Place an Order in Shortcuts

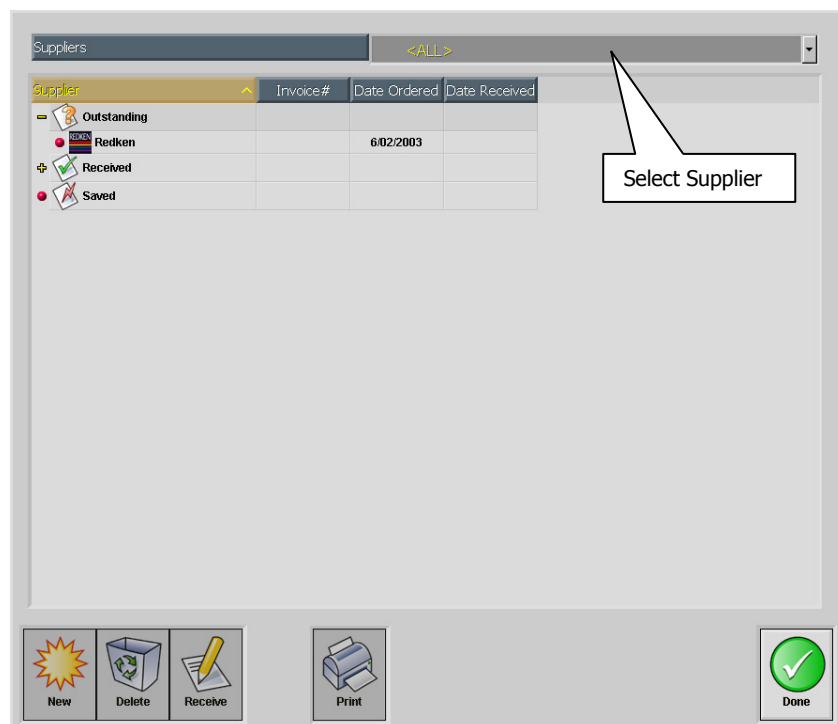
## Summary:

Shortcuts supports an advanced Stock Control feature which allows you to track the Ordering and Receiving of Products in one simple and easy to use area. Based on the stock levels setup in the Products screen and transactions processed at Point of Sale, Shortcuts will automatically generate required Product levels (by Supplier) and prepare Orders ready for processing. Shortcuts also provides the flexibility to add, edit and delete Products from these automatically generated orders before completing an Order.

**Article Applies to:** Shortcuts V7.2 / Shortcuts v7.3

**Related Articles:** How to Setup Products in Shortcuts  
How to Receive an Order in Shortcuts  
Performing a Manual Stocktake  
Performing an Automatic Stocktake (Handheld Scanners)

From the Navigation bar select the **Stock Menu**, select the **Ordering** icon, the Ordering screen will appear:



1. Click and scroll to select the relevant **Supplier** from the Supplier drop down list. Any Saved, Outstanding and/or Received Orders for the Supplier will be displayed.
2. Click the **New** button. All required Products for the Supplier will be automatically generated and displayed on the screen\*. An Order number will be created for this new Order.

Matrix Order# 45 Invoice#

Company	Line	Product	Otv.	Buy Price	GST	Total
Matrix Internati...	Amplify Champ...	Volumizing Shampoo 400ml	4	18.95	6.89	75.80
Matrix Internati...	Amplify Champ...	Volumizing Shampoo 1ltr	2	9.50	1.73	19.00
Matrix Internati...	Amplify Champ...	Colourcare XL Shampoo 400ml	1	12.00	1.09	12.00
Matrix Internati...	Amplify Champ...	Colourcare XL Shampoo1ltr	2	24.95	4.54	49.90
Matrix Internati...	Amplify Condi...	Instant Conditioner 236ml	48	2.95	12.87	141.60
Matrix Internati...	Amplify Condi...	Volumizing Conditioner 1 ltr	3	24.95	6.80	74.85
Matrix Internati...	Amplify Styling...	Volumizing Root Lifter 250ml	2	11.65	2.12	23.30
Matrix Internati...	Amplify Styling...	Liquid Style Gel 150ml	2	11.65	2.12	23.30
Matrix Internati...	Amplify Styling...	Volumizing Hair Spray 283gm	2	11.65	2.12	23.30
Matrix Internati...	Amplify Styling...	Foam Volumizer 250gm	1	11.65	1.06	11.65

Client <None>

GST \$41.34  
Total Order \$454.70  
Freight \$0.00

Buttons: Add, Delete, Save, Setup, Print, Order, Receive, Previous, Done

02:27 Sun, 24 May '09  
Main  
Tools  
Stock  
Products  
Ordering  
Stocktake  
Bundle  
Unbundle  
Setup  
Wendy Owner  
Log Off

**\*Note:** Required products are only automatically generated if you are entering Stock Level for products into the Product setup screen, for more information refer to article "How to Setup Products in Shortcuts"

- If there are no changes to be made to the Order, skip to Step 14.
- If you want to Add any additional Products to the Order, click the **Add\*\*** button. The Add Products window will appear displaying all Products grouped by Supplier. The Supplier you are currently Ordering from will be expanded listing all Products.

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Product Selection

Product	Buy	Sell
Matrix		
0 Volume 473ml	0.00	0.00
1 Black	0.00	0.00
1 Black	0.00	0.00
1 Black	0.00	0.00
1 Box 5+Protak(12x28g)	0.00	79.95
1A Ebony	0.00	0.00
1V Black	0.00	0.00
1V Black Violet	0.00	0.00
2 Dark Brown	0.00	0.00
2 Natural Black	0.00	0.00

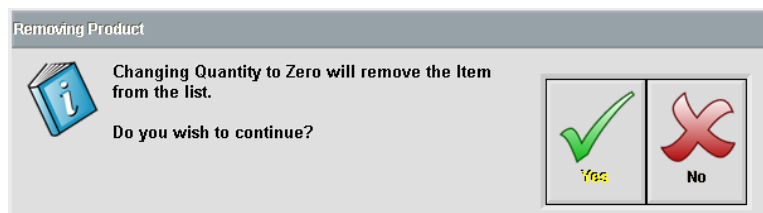
Sort By... Supplier

Buttons: Add, Details, Done

**\*\*Note:** All products must be linked to a supplier, otherwise they will not be available from the add products window when grouped by supplier. You can change the sort by order to company/line to view all products regardless of supplier. However if your products are not linked to a Supplier, it is best if you return to the product setup screen and associate all products with the relevant supplier refer to article "How to Setup Products in Shortcuts".

5. Usually you would Add products from the Supplier that you are currently Ordering from. However, if you want to Add products from another Supplier to the current Supplier's Order, double click to expand another Supplier to display the relevant Products.
6. If you want you can change the sort by order to either Company/Line or Category/Sub Category, choose the relevant option from the Sort By... drop down list.
7. Using the **Drag Bar**, click to **select the relevant Product(s)** you want to Add to the Order. The selected Product(s) will appear shaded. Without lifting your finger drag to move the selected Product(s) into the Ordering screen. Lift your finger to release and Add the Product(s) to the Order. Alternatively, click the Add button. All selected Products will be added to the current Order and, by default, the Order quantity will be set to 1.
8. Click the **Done** button in the Add Products window to return to the Ordering screen. Products can be sorted by clicking on the relevant column heading (e.g. Company, Line, Product etc).
9. If you want to Edit the **Quantity** for a Product, click to select the relevant Quantity field and then click again to edit. Using the keyboard, type in the new quantity. Products that have been manually Added to the Order can be sorted using the List Controls for easy viewing and editing.

If you change the qty to 0, the following message will appear on the screen, clicking **Yes** will remove the product from the order (this is the same as deleting the product off the list).



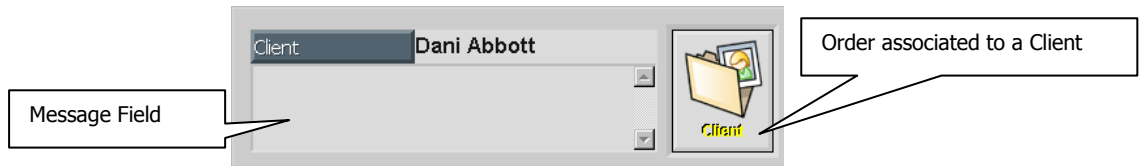
10. If you want to **Edit** the Buy Price for a Product, click to select the relevant Buy Price field and then click again to edit. Using the keyboard, type in the new buy price. Once you have entered the new price the following message will be displayed, clicking Yes will update the buy price for any future orders, No will only update the buy price for this order.



11. If you want to **Delete** any Products from the Order, click to select the relevant Product then click the **Delete** button. Alternatively you may hit the Delete key on the keyboard. To select multiple Products, hit and hold Ctrl on the keyboard and Click to select the relevant Products.

**\*\*\*Note:** If you wish to clear the entire order to start again, right mouse click within the order screen and select **Clear List**.

12. If you want to **Associate** this Order with a specific Client, click the **Card** button. The Select Client screen will appear. Search for and select the relevant Client. Click the **Done** button to return to the Ordering screen.



13. If you want to enter a **Message** for the Order, using the keyboard, type the relevant message in the Message field.
14. Click the **Order** button to proceed with the Order. A Confirm Order window will appear asking, "Do you wish to proceed with this order?"
15. Click the **Yes** button to continue or the No button to cancel this request.

If you have an email address setup for a supplier in the Supplier Details window, a message will appear asking if you would like to email your stock order. Click the **Yes** button to email your order. The order will be attached to the email in a PDF format or CSV file format depending on the details on the supplier.

16. The Print window will appear.
17. Select any relevant Printer options (printer, number of copies, etc).
18. Click the **Print** button.

## Clearing an Automatically Generated Order

If you want to Clear an Automatically Generated Order for a Supplier and add Products from scratch, you can clear the Ordering List.

1. Click any Product in the list and hold until the pop-up menu appears.
2. Scroll to select the **Clear List** option. A message window will appear asking "Are you sure you want to clear this order?"
3. Click the **Yes** button to continue or the No button to cancel this request. All products in the ordering screen will now be removed.
4. Click the **Add** button to add any Products to this Order. Continue to process the Order as usual.

**Note:** *Once this order is placed or saved, if you go to place another order for the same Supplier another automatic order will be generated depending on the stock levels for Products entered into Shortcuts.*

## Saving an Order

You may want to leave the Ordering screen for a period of time and Save any changes made to an Order.

If a change is made to an Order (Products added, edited or deleted) and you click either the Previous or Done buttons to leave the screen, a message will appear asking if you want to Save changes made to this Order. Click the **Yes** button to save any changes or the No button if you do not want to save changes. Saved Orders will be available in the Saved list on the main Ordering screen.

Saved Orders can be deleted if no longer required.

## Definitions:

The screenshot shows an ordering interface with a table of products. Callouts provide definitions for the columns: Qty (number of items), Buy Price (price per item), GST (total GST for product(s)), and Total (total cost of product(s), GST Inclusive).

Product	Qty.	Buy Price	GST	Total
01B Onyx	3	8.87	42	26.61
03NB Mocha Java	1	8.87	0.	8.87
03G Cinnamon			0.81	8.87
06R Rocket Fire				
06G St Tropez				
09N Cafe Au Lait				

**Qty:** This is the number of items you are ordering

**Buy Price:** This displays the Buy Price of a single item, regardless of Qty you are ordering.

**GST:** This is the total GST for product(s)

**Total:** This is the total cost of Product(s). **GST Inclusive**

Redken		Order#	43	Invoice#
Product	Oty.	Buy Price	GST	Total
(P)Solve Purifying Shampoo 250ml	1	9.22	0.84	9.22
(P)Undone 100ml	2		1.77	19.46
12AV 60g	1		0.89	9.75
Colour Extend Conditioner 250ml	3	9.89	2.70	29.67

**\$6.20      \$68.10**

<b>Freight:</b> This is the Freight amount. <b>GST Inclusive</b>	<b>Freight</b>		<b>\$0.00</b>
	Total GST		<b>\$6.19</b>
	Total Order		<b>\$68.10</b>

**Total GST:**  
This is the GST column (\$6.20) + GST on Freight (\$0.00). You may see a rounding difference.

**Total Order:**  
This is the Total Column (\$68.10) + Freight (\$0.00). You may see a rounding difference.

### Product Pop up menu

- Clear List – See Clearing an Automatically Generated Order
- Detail – This will display the Stock Levels, Buy, Sell price etc for a particular product
- Export

### Heading pop up menu

Right mouse click on one of the Headings eg Product a pop up menu will appear, this allows you to add additional columns eg Product Stock levels, Order Multiple (for barcode scanners, multiple scans will increase quantity), Buy Price, Sell Price, Company, Line etc.