

How to Receive 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.

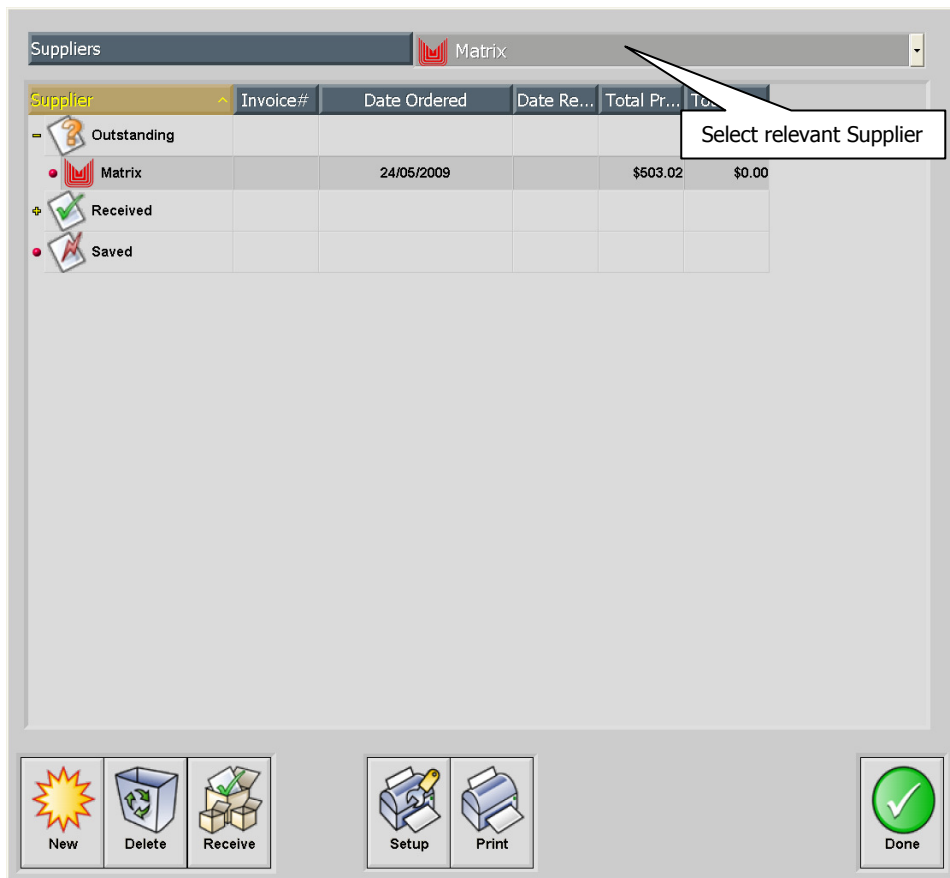
Outstanding Orders can also be viewed at any time and adjustments made before receiving the relevant Products. New stock levels are automatically updated when Orders are received.

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

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

Receiving an Order

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 to select the **Outstanding Order** you want to Receive.
3. Click the **Receive** button. The Product information for that Order will be displayed.

Matrix Order# 45 Invoice#

Company	Line	Product	Qty.	Buy Price	GST	Total
Matrix Internati...	Amplify Condi...	Instant Conditioner 236ml	48	2.95	14.16	155.76
Matrix Internati...	Amplify Condi...	Volumizing Conditioner 1 ltr	3	24.95	7.48	82.33
Matrix Internati...	Amplify Shamp...	Colourcare XL Shampoo 400ml	1	12.00	1.20	13.20
Matrix Internati...	Amplify Shamp...	Colourcare XL Shampoo1tr	2	24.95	4.99	54.89
Matrix Internati...	Amplify Shamp...	Volumizing Shampoo 1ltr	2	9.50	1.90	20.90
Matrix Internati...	Amplify Shamp...	Volumizing Shampoo 400ml	4	19.95	7.58	83.38
Matrix Internati...	Amplify Styling...	Foam Volumizer 250gm	1	11.65	1.16	12.81
Matrix Internati...	Amplify Styling...	Liquid Style Gel 150ml	2	12.95	2.59	28.49
Matrix Internati...	Amplify Styling...	Volumizing Hair Spray 283gm	2	11.65	2.33	25.63
Matrix Internati...	Amplify Styling...	Volumizing Root Lifter 250ml	2	11.65	2.33	25.63

Client <None>

GST \$45.72
Total Order \$503.02
Freight \$0.00

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

- Verify that the Products you have physically received match the Products Ordered in Shortcuts (use the Shortcuts Printed Order to check this). If there are no changes to be made to the Order before Receiving, skip to Step 11.
- If you need to **Add** any additional Products to the Order before Receiving, 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.

Matrix Order# 45 Invoice#

Company	Line	Product	Qty.	Buy Price	GST	Total
Matrix Internati...	Amplify Condi...	Instant Cond...	48	2.95	14.16	155.76
Matrix Internati...	Amplify Condi...	Volumizing C...	3	24.95	7.48	82.33
Matrix Internati...	Amplify Shamp...	Colourcare)	1	12.00	1.20	13.20
Matrix Internati...	Amplify Shamp...	Colourcare)	2	24.95	4.99	54.89
Matrix Internati...	Amplify Shamp...	Volumizing S	2	9.50	1.90	20.90
Matrix Internati...	Amplify Shamp...	Volumizing S	4	19.95	7.58	83.38
Matrix Internati...	Amplify Styling...	Foam Volumi	1	11.65	1.16	12.81
Matrix Internati...	Amplify Styling...	Liquid Style (2	12.95	2.59	28.49
Matrix Internati...	Amplify Styling...	Volumizing H	2	11.65	2.33	25.63
Matrix Internati...	Amplify Styling...	Volumizing R	2	11.65	2.33	25.63

Client <None>

Product Selection

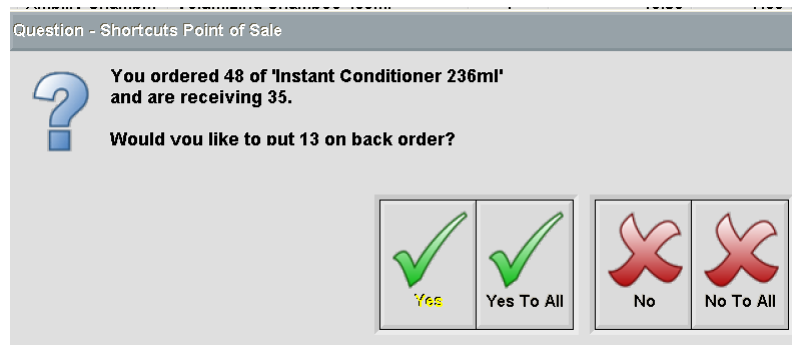
Product	Buy	Sell
Matrix		
0 Volume 473ml	0.00	0.00
1 Black	0.00	0.00
1 Black	0.00	0.00
1 Black	0.00	0.00
1 Box 5+Protak(12x28g)	0.00	79.95
1A Ebony	0.00	0.00
1V Black	0.00	0.00
1V Black Violet	0.00	0.00
2 Dark Brown	0.00	0.00
2 Natural Black	0.00	0.00

Sort By... Supplier

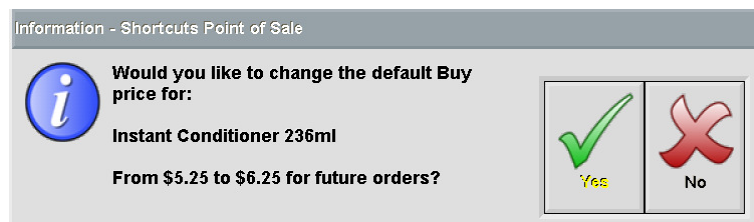
Freight \$0.00

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

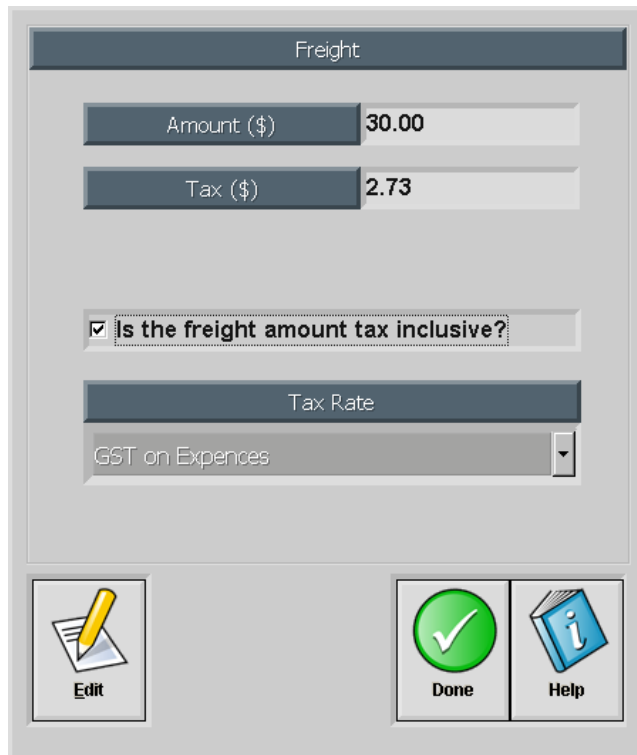
6. Using the Drag Bar, click to **select the relevant Product(s)** you need to Add to the Order. The selected Product(s) will appear shaded. Without lifting your finger drag to move the selected Product(s) into the Ordering screen. Lift your finger to release and Add the Product(s) to the Order. Alternatively, 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.
7. Click the **Done** button in the Add Products window to return to the Ordering screen.
8. If you need 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. You will receive the follow message – Clicking the Yes button will automatically create a new Order (and generate a new Order number) for these Back Ordered Products. Clicking the No button, will cancel the Order for these Products assuming you do not expect delivery. Yes to All will automatically place any product for this order that has the received quantity altered on backorder, No To All means you will not be prompted if you change a quantity on this order and nothing will be placed on backorder.



9. If you need 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 enter the new buy price the following message will be displayed, clicking Yes will update the buy price for any future order, No will only update the buy price for this order.



10. If you need 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.
11. If you want to you can allocate an **Invoice Number** for the Order before Receiving. Click to select the Invoice # field (at the top of the screen), and using the keyboard type the relevant invoice number.
12. If you want to add a **Freight cost** to the Order before Receiving, click the **Freight** button. The Freight window will appear:



13. Click the **Edit** button. The Enter Freight window will appear. Using the keypad on the screen enter the Freight amount, and then click the **Done** button. If relevant, remove the tick from the 'Is the freight amount tax inclusive' option*. Select the appropriate Tax Schedule from the Tax Rate drop down list. Click the **Done** button to close the Freight window and return to the Ordering screen.

*If the amount entered includes GST, tick the check box "Is the freight amount tax inclusive", the system will work out the GST portion and add it into the Tax(\$ field (eg \$2.73 based on 10% tax). If this option is not ticked the system will work out the GST and enter it into the Tax(\$ field (eg \$3.00 based on 10% tax).

No GST will be worked out if the Tax Rate field is set to Exempt.

14. Once you are satisfied that the Order to be Received is correct (e.g. correct Products, Quantities and Prices, etc) click the **Receive** button to complete the Order. A message will appear asking, "Are you sure you want to proceed?"
15. Click the **Yes** button to proceed or the No button to cancel this request. Once you click the Yes button, Shortcuts will instantly update your current stock levels for all Products Received. This process cannot be reversed.

Note: If you receive products that have **not been ordered**, Shortcuts allows you to update current stock levels without actually placing an order. To do this, prepare the order as usual and simply click the receive button. Shortcuts will generate an order and receive the products instantly.

Note: If you want Shortcuts to automatically update the buy price for products received to reflect the order price, ensure that the '**always**' or '**ask**' option is ticked in the 'update buy price from orders' field in the stock configuration screen (Setup Menu – Configuration icon – General Menu – Stock icon)

Note: If any products in the order are associated with barcode label type, the **Barcode Wizard** will appear when you receive the order allowing you to print out barcode labels for any relevant products.

Definitions:

Product	Qty.	Buy Price	GST	Total
01B Onyx	3	8.87	2.61	26.61
03NB Mocha Java	1	8.87	0.81	8.87
03G Cinnamon			0.8	
06R Rocket Fire			0.8	
06G St Tropez			0.8	
09N Cafe Au Lait			0.8	

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.

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

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

Company	Line	Product	Qty.	Buy Price	GST	Total
Matrix Internati...	Amplify Condi...	Instant Conditioner 236ml	1	9.22	0.84	9.22
Matrix Internati...	Amplify Condi...	Volumizing Conditioner 1 ltr		19.46	1.77	19.46
Matrix Internati...	Amplify Shamp...	Colourcare XL Shampoo 400ml		9.75	0.89	9.75
Matrix Internati...	Amplify Shamp...	Colourcare XL Shampoo 1ltr	3	9.89	2.70	29.67

GST Column = **\$6.20**

Total Column = **\$68.10**

\$6.20 \$68.10

Total GST: This is the GST column (\$6.20) + GST on Freight (\$2.73). You may see a rounding difference.

GST	\$8.93
Total Order	\$98.10
Freight	\$30.00

Freight: This is the Freight amount. **GST Inclusive**

Total Order: This is the Total Column (\$68.10) + Freight (\$30.00). You may see a rounding difference.