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# How to Setup Products in Shortcuts

## Summary:

The Products screen is where Products are entered and relevant information is stored, including Stock Levels, Codes and Pricing details etc. The Products screen is displayed using Shortcuts' standard Tree Controls, which provide added flexibility for adding, viewing and editing Product information.

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

**Related Articles:** How to Perform a Manual Stocktake  
How to Perform an Automated Stocktake (Handheld Scanners)  
How to Create and Place an Order in Shortcuts  
How to Receive an Order in Shortcuts

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## Definitions

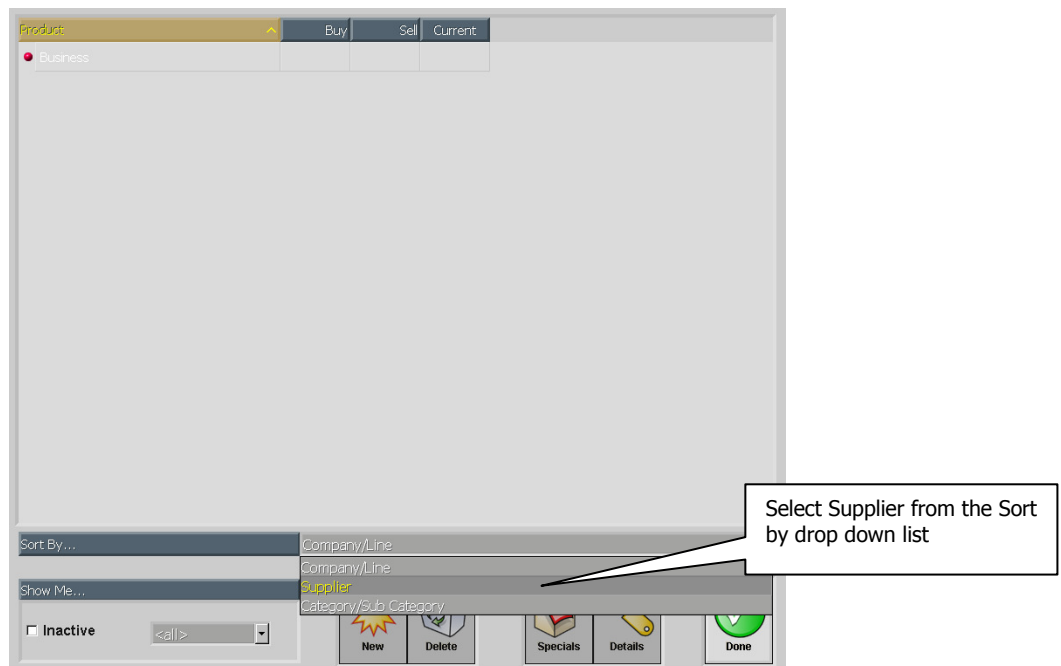
- **Products**  
A Product refers to single item of merchandise (e.g. Fudge Gum 250gm). In Shortcuts, a Product must belong to a Line that in turn belongs to a Company.
- **Lines/Companies**  
A Line refers to range of Products from a particular Company (e.g. Fudge). A Company refers to the manufacture of the Lines of Products (e.g. Joico/Sabre Corporation manufacturers the range of Fudge Products).
- **Suppliers**  
A Supplier refers to an organisation that distributes (supplies) Products to your business. The Supplier for a Particular Product may or may not be the same as the Company who manufactures the Products (e.g. you may purchase Fudge Gum directly from Joico/Sabre corporation or you may purchase it from another distributor).
- **Sub Categories/Categories**  
Categories and Sub Categories are used to group similar Products together for easy searching at Point of Sale and for reporting purposes. A Category is generally a broad grouping of similar Products (e.g. Shampoos, Brushes, Paper etc....) A Sub Category is a more defined grouping of similar Products within a Category (e.g. Dandruff Shampoos, Round Brushes, Recycled Paper, etc). Categories and Sub Categories are generally not related to Suppliers and/or Companies/Lines (e.g. you may purchase some Products in the Paper Category from one supplier and some from another).

## Steps for Setting up Products:

- Step 1 – Adding Suppliers and Setup Supplier Details
- Step 2 – Add Categories
- Step 3 – Sub Categories
- Step 4 – Add Companies and Setup Company Details
- Step 5 – Add Lines for Companies
- Step 6 – Add Products
- Step 7 – Setup Product Details
- Step 8 – Associate Products with Supplier and /or Categories/Sub Categories

## Step 1: Adding a New Supplier

From the Navigation bar select the **Stock Menu** then the **Products** icon, the product screen will appear:



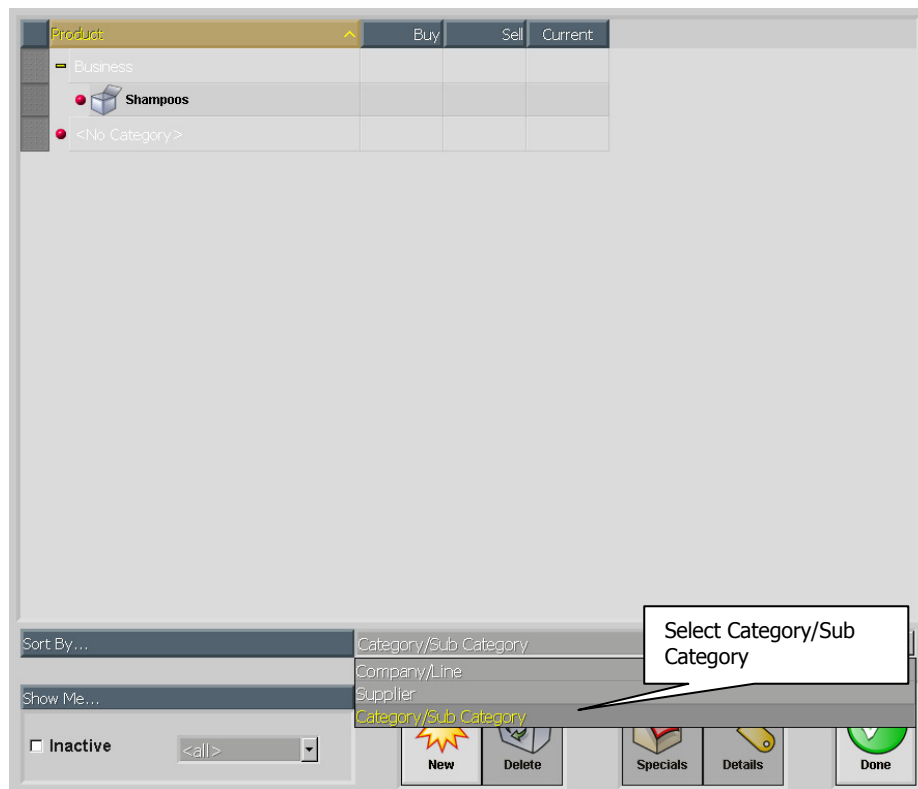
1. Click and scroll to **select Supplier** from the Sort by... drop down list. The Product list will be sorted by Suppliers.
2. Select **Business** at the top of the screen.
3. Click the **New** button. A new entry will appear at the bottom of the Supplier list and the Name field (<New Supplier>) will be highlighted.
4. Using the keyboard, type in a **name** for the new Supplier (e.g. Matrix).
5. Click the **Details** button. The Supplier window will appear.
6. Using the keyboard, type in all relevant details. Hit the Tab key on the keyboard to move through the fields.

A screenshot of the 'Joico' Supplier Details form. The form is divided into two main sections: 'Supplier Details' and 'Ordering'. The 'Supplier Details' section includes fields for Address (15A Golden Street), Suburb (Spring Hill), State (QLD), PCode (4000), Phone (07 7654 6778), Fax (07 7654 6779), Web (WWW.joico.com), and Email (Orders@joico.com). The 'Ordering' section includes fields for Account Number (123456), Shipping Ref., and checkboxes for 'Email stock orders in PDF format' (checked) and 'Email stock orders in CSV format' (unchecked). Below the 'Ordering' section is the 'Rep. Details' section, which includes fields for Name (Paul Smith), Phone, Fax, Mobile (0499 123456), and Email (Paulsmith@joico.com). A 'Done' button with a green checkmark is located at the bottom right of the form.

7. Click the **Done** button to save changes and return to the Products screen.

## Step 2: Adding a New Category

1. Click and scroll to select **Category/Sub Category** from the Sort by... drop down list. The Product list will be sorted by Categories.



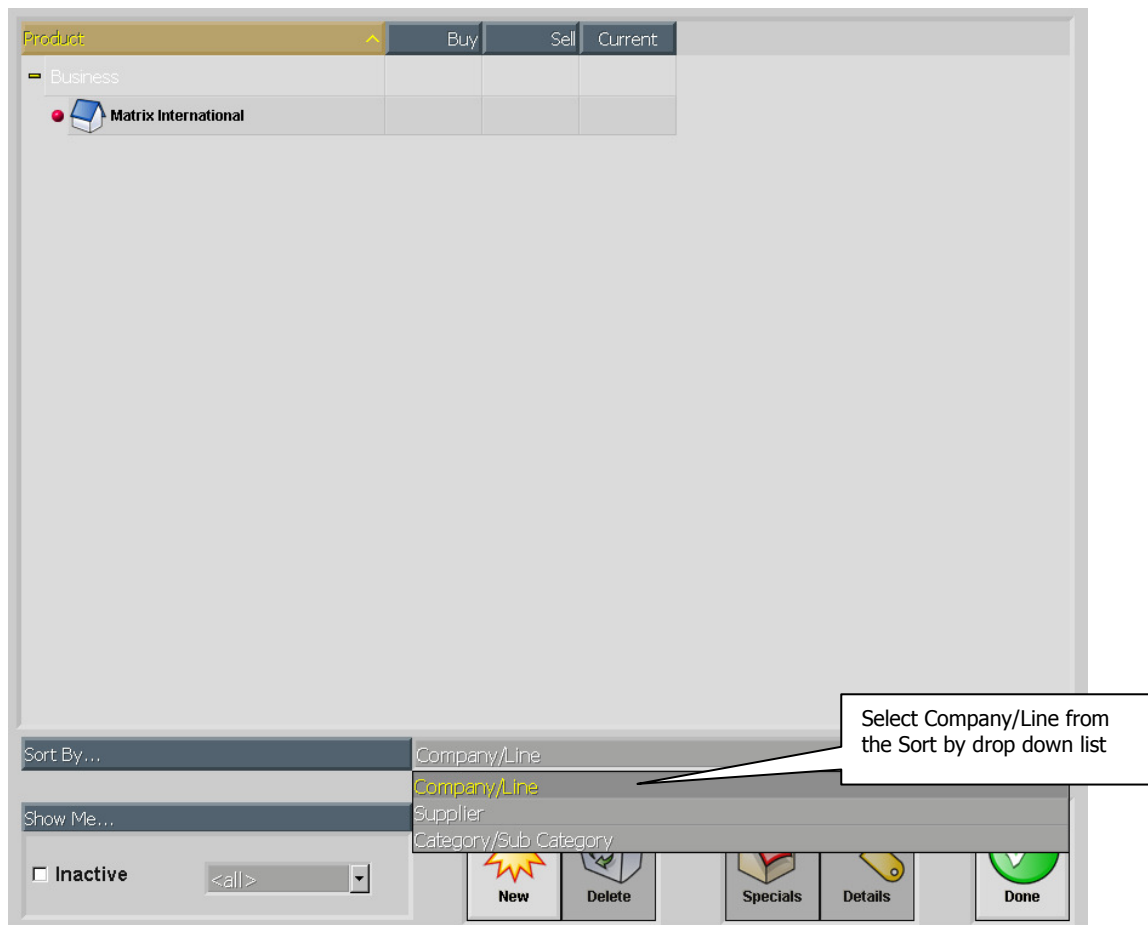
2. Select **Business** at the top of the screen.
3. Click the **New** button. A new entry will appear at the bottom of the Product list and the Name field (<New Category>) will be highlighted.
4. Using the keyboard, type in a name for the new Category (e.g. Shampoos).

## Step 3: Adding a New Sub Category

1. Click and scroll to select **Category/Sub Category** from the Sort by... drop down list. The Product list will be sorted by Categories.
2. Click to select the **Category** (e.g. Shampoos) you want to add the new Sub Category to.
3. Click the **New** button. A new entry will appear at the bottom of the Product list and the Name field (<New Sub Category>) will be highlighted.
4. Using the keyboard, type in a name for the new Sub Category (e.g. Dandruff Shampoos).

## Step 4: Adding a New Company

From the Navigation bar select the **Stock Menu** then the **Products** icon, the product screen will appear:



1. Click and scroll to select **Company/Line** from the Sort by... drop down list. The Product list will be sorted by Companies.
2. Select **Business** at the top of the screen.
3. Click the **New** button. A new entry will appear at the bottom of the Company list and the Name field (<New Company>) will be highlighted.
4. Using the keyboard, type in a name for the new Company (e.g. Matrix International).
5. Click the **Details** button. The Company window will appear.
6. Using the keyboard, type in all relevant details. Hit the Tab key on the keyboard to move through the fields.
7. Click and scroll to select the relevant **Supplier** from the Default Supplier drop down list. All Products that are entered for this Company will, by default, be associated with this Supplier. This can be changed for individual Products if required.
8. Click and scroll to select the relevant **Category/Sub Category** from the Default Category/Sub Category drop down list. All Products that are entered for this Company will, by default, be associated with this Category/Sub Category. This can be changed for individual Products if required.

Matrix International	
<b>Company Details</b>	
Company Name	Matrix International
Default Supplier	 Joico
Default Category	<None>
Account Number	123456
Address	
15A Golden Street	
Suburb	
Spring Hill	
State	PCode
Qld	4000
Phone	Fax
07 7654 6778	07 7654 6779
<b>Rep Details</b>	
Full Name	
Paul Smith	
Phone	
Mobile	
0499 123456	
Fax	
<input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Retail	
<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">               Done           </div> <div style="text-align: center;">               Cancel           </div> </div>	
Sort By... Company/Line	

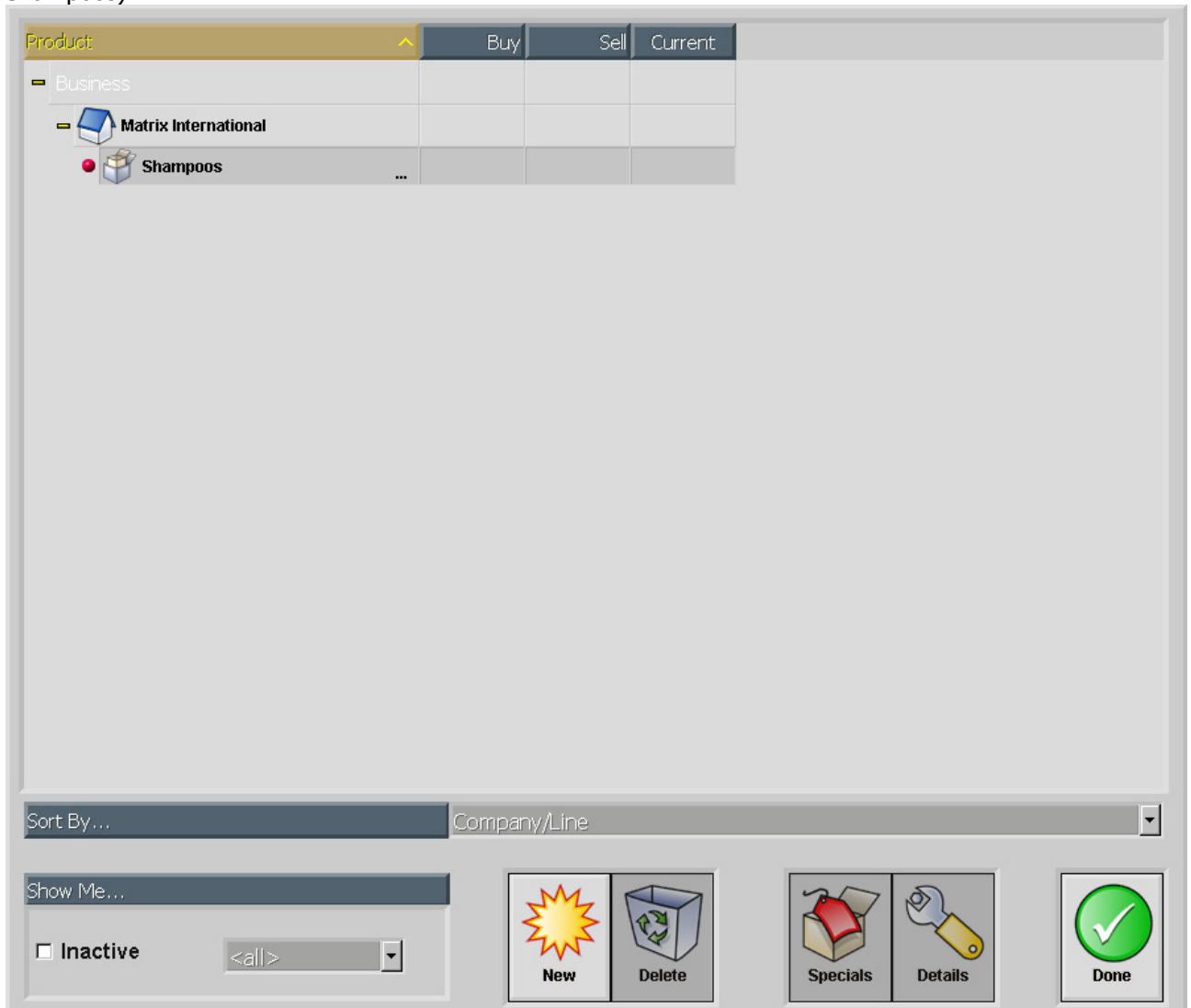
9. Select Retail if the product range is retail or untick if a professional range. A Retail product refers to a product that is sold at point of sale. A professional product refers to a product that is used in the business (consumable) and is not sold at point of sale.

10. Click the **Done** button to save changes and return to the Product screen

## Step 5: Adding a New Line

From the Navigation bar select the **Stock Menu** then the **Products** icon, the product screen will appear.

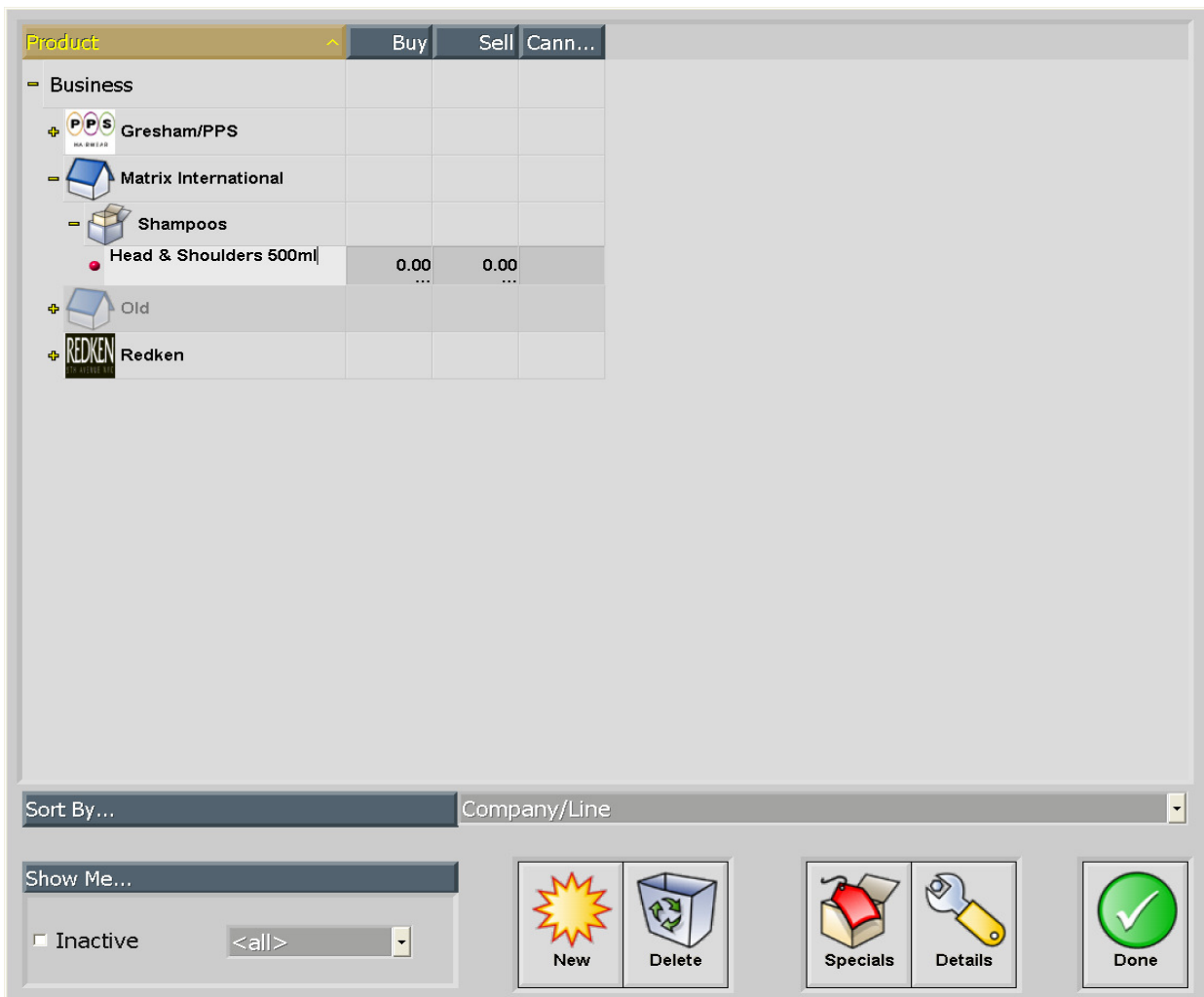
1. Click and scroll to select **Company/Line** from the Sort by... drop down list. The Product list will be sorted by Companies.
2. Click to select the **Company** you want to add the new Line to (eg Matrix International).
3. Click the **New** button. A new entry will appear at the bottom of the Product list and the Name field (<New Line>) will be highlighted.
4. Using the keyboard, type in a name for the new Line (e.g. Shampoos).



## Step 6: Adding a New Product

From the Navigation bar select the **Stock Menu** then the **Products** icon, the product screen will appear:

1. 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 new Product 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 Head & Shoulders 500ml). Now you will need to Setup the Details (Prices, Stock Levels, Codes, etc) for this Product.



Product	Buy	Sell	Cann...
Business			
+ PPS Gresham/PPS			
- Matrix International			
- Shampoos			
Head & Shoulders 500ml	0.00	0.00	
+ Old			
+ Redken			

Sort By... Company/Line

Show Me... Inactive <all>

New Delete Specials Details Done

# Step 7: Setup Product Details

## Entering Product Details Using the Details Button

Clicking the Details Button on the Products screen will open the Details window, allowing you to add, view and update relevant product details for the selected product. This window is separated into four sections, prices, properties, history and barcodes, represented by icons on the left hand side of the Details window. Click the relevant icon to view the section.

**Prices and Levels**  
The prices and levels section displays all prices, tax schedules and stock levels for the selected product. These fields can be added, viewed and updated here as required.

**Properties**  
The properties section displays the status, codes, label types and unit measure information for the selected product. These fields can be added, viewed and updated as required.

**History**  
The history section records all stock level changes/actions for the selected product. This section will display a list of sales, orders, manual adjustments, stocktakes and refunds associated with the selected product. The date and time for each action will also be displayed here.

**Barcodes**  
Allows you to assign barcodes to a product.

Buy	3.45
Buy Tax	GST on Products Purchase
Sell	7.50
Sell Tax	GST on Product Sales
RRP	7.25

Current	2
On Order	0
Required	5
Warning	0
Min. Reorder	3
Cannot Order After	

## Entering Product Details Using Tree Controls

The main Products screen is displayed using Shortcuts' standard Tree Controls. Product Details are contained in fields and grouped by columns. By default the Buy, Sell, Required and Current fields will be displayed.

If you want to use Tree Controls to enter Product details, you must first select the fields that you want to edit in the Products screen. Click and hold (or right click using the mouse) on a Column heading until the Pop-up menu appears, and then scroll to select any fields you want to be displayed. Fields are grouped into 5 Sub-menus; Prices; Levels; Properties; Groups; and Calculated. All fields that have been selected for display in the Products screen will be ticked in the Pop-up menu. Columns can also be sorted into a convenient order if required.

To enter Product Details, click to select the relevant field, then click again to add or update the field. Using the keyboard, type the relevant information into the field. Hit the Tab key to move from left to right through the available fields. Hit the Enter key to move down the Rows within a Column.

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## Prices Fields

- **Buy Price** - The Buy Price refers to the Business' unit purchase price for the selected Product. Using the keyboard, type in the Buy Price for the selected Product. The Buy Price can be entered to either include or exclude any Tax. The Tax component will be added/calculated at Point of Sale to reflect the 'Does Product Buy Price include Tax?' option set in the Tax Setup screen
- **Sell Price** - The Sell Price refers to the price the Customer is to pay for the selected Product at Point of Sale. Using the keyboard, type in the Sell Price for the selected Product. The Sell Price can be entered to either include or exclude any Tax. The Tax component will be added/calculated at Point of Sale to reflect the 'Does the Sell Price include Tax?' option set in the Tax Setup screen.
- **RRP** - RRP refers to the manufacturer's Recommended Retail Price. Using the keyboard, type in the RRP Price for the selected Product. This field is stored for your reference only.
- **Buy Tax** - If you have set a Default Tax Schedule for Product Buy Tax, whenever a new Product is entered the Tax Schedule will automatically be set. If you need to change this, select the relevant Tax Schedule from the drop down list. If the Product is tax exempt, choose the <Exempt> option. Tax Schedules and Defaults are setup in the Tax Setup screen.
- **Sell Tax** - If you have set a Default Tax Schedule for Product Sell Tax, whenever a new Product is entered the Tax Schedule will automatically be set. If you need to change this, select the relevant Tax Schedule from the drop down list. If the Product is tax exempt, choose the <Exempt> option. Tax Schedules and Defaults are setup in the Tax Setup screen.
- **GP** - The GP field displays the Gross Profit in monetary value for the Product. The Gross Profit is calculated on the difference between the current buy price and the current sell price as setup in the Products screen (i.e. sell price minus buy price).
- **%GP** - The %GP field displays the Gross Profit as a percentage for the Product. The Gross Profit % is calculated on the difference between the current buy and sell price as setup in the Products screen (i.e. sell price minus cost price divided by sell price X 100).
- **%Markup** - The %Markup field displays the Markup as a percentage for the Product. The %Markup is calculated on the difference between the current buy and sell price as setup in the Products screen (i.e. sell price minus cost price divided by cost price X 100).
- **Avg. Cost** – Average cost tracks the cost of each product as it is received into stock. Shortcuts does not store a historical purchase cost against each individual item or shipment of a product. Instead when a new shipment of Product A is received, all items of Product A are assigned a value that is averaged across stock on hand and stock from the new shipment.
- **Avg. Cost Inc Tax** – The average cost of the product including tax.
- **Avg. Sell** - The Avg. Sell field displays the Average Sell Price for the Product calculated on all sales of that product over the last 12 months.

## Levels Fields

- **Current** - The Current level refers to the physical current stock count for the selected Product. Using the keyboard, type in the Current level for the selected Product.
- **On Order** - The On Order field displays the number of the selected Product that has been ordered but not yet received. This field is also displayed in the Products Details window.
- **Required** - The Required level refers to the optimal number you want to carry in stock for the selected Product. Using the keyboard, type in the Required level for the selected Product. If you set the Required level to zero (0) Shortcuts will not automatically include this Product when generating stock orders. However, the Product can still be added manually to stock orders when required.
- **Min. Reorder** - The Min. Reorder level refers to the minimum number that can be reordered for the selected Product. Using the keyboard, type in the Min. Reorder level for the selected Product. Shortcuts will not automatically order the relevant Product until the number required reaches this Min Reorder

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level. However, the Product can still be added manually to stock orders when required (eg Required is 7, Min Reorder is set to 3, when the current level falls below 3 then the order will be created for 4).

- **Order Multiple** - The Order Multiple level refers to an order multiple which you may be required to order from your supplier for the selected product. If you set the Order Multiple level to two then Shortcuts will always order in multiples of two. If shortcuts required 3 to be ordered the order quantity would be updated to 4 to order in multiples of 2.
- **Warning** - The Warning refers to the minimum number you want to hold in stock for the selected product. When you are below that quantity, the on hand quantity will turn red to warn you that you are below your minimum stock holding.

## Properties Fields

- **PLU** - PLU refers to Product Look Up number. PLU numbers are numeric only and can store up to 6 characters. If you are using PLU numbers at Point of Sale, type in the relevant PLU number in the PLU field for the selected Product. The PLU Number will appear on the stock order when printed or faxed to the relevant supplier. The PLU option for Point of Sale Mode is set up in Workshop.
- **Barcode** - When you add a new Product in the Products screen Shortcuts will automatically assign a barcode. If you wish to enter a different barcode for the selected Product, double click to highlight the barcode field and using the keyboard, type or scan the barcode characters. Barcodes can be alpha numeric and can store up to 15 characters. You can assign multiple barcodes to a product in Shortcuts. To assign multiple barcodes to a product, select the product, click details and then the barcode option. To add another barcode select New and then either scan or enter the barcode. You can only have one primary barcode which should be the main barcode.

Scanning a Product barcode in the Products screen will select the Product from the list.

- **Purchase Unit** – The Purchase Unit field allows you to specify the purchase unit of measure for the selected product (eg grams, litres, ounces etc). If you are using the Visit Details feature you must specify the purchase unit to match quantities used for a client when entering visit details. For example if you use peroxide in units of millilitres (ml), then make sure you choose millilitres (ml) as the purchase unit rather than litres (L).
- **Purchase Size** – The Purchase Size field refers to the number of purchase units that make up a full product (eg if a tube of colour is 80grams the purchase size is 80 and the purchase unit is grams).
- **Label Type** - If you are printing barcodes, click and scroll to select the relevant barcode label size for the selected Product from the drop down list. The Label Types default to the standard Avery Label Sizes; Small - L7656; Medium - L7651; Large - L7159.
- **Product Code** - The Product Code field refers to the Supplier's identification code for the selected product. Using the keyboard, type in the Product Code for the selected Product. Product Codes will appear on stock orders when printed or faxed to the relevant Supplier for Product reference. Product Codes can be alpha numeric and can store up to 15 characters.
- **Active** - When a tick is placed in the Active tick box this indicates the selected Company/Line/Product is Active (being used). If there is no tick this will indicate the Company/Line/Product is Not Active (not being used).
- **Retail** – A Retail product refers to a product that is sold at point of sale. A professional product refers to a product that is used in the business (consumable) and is not sold at point of sale. Select either retail or professional from the drop down list for the selected company/line/product. A warning message will appear asking you to confirm your request. Professional products will appear in italics for visual distinction. You can choose to view retail, professional or all products see the show me section in the Product screen.

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## Group Fields

- **Company** - The Company field displays the associated Company for the selected Product.
- **Line** - The Line field displays the associated Line for the selected Product.
- **Supplier** - The Supplier field displays the associated default Supplier for the selected Product.
- **Category** - The Category field displays the associated Category for the selected Product.
- **Sub Category** - The Sub Category field displays the associated Sub Category for the selected Product.

## Calculated Fields

Calculated fields contain analysis information for the selected Product. Calculated Fields are automatically generated and cannot be edited.

- **Last Stocktake** -The Last Stocktake field displays the date on which the Product was last included in a stocktake.
- **Last Sold** -The Last Sold field displays the date the last time the product was sold
- **Last Stocktake** -The Last Stocktake displays the date the product was last updated in a stocktake.
- **#Last Week** - The # Last Week field displays the number sold in the Last Week for the Product. The Last Week is defined by the 'End of Week Day' specified in the Business Setup screen.
- **#Last Month** - The # Last Month field displays the number sold in the Current Month for the Product. The Last Month is defined by the Default Date Range (Calendar or Business) set in the General Setup screen.
- **\$Last Week** -The \$ Last Week field displays the total dollar value sold in the Last Week for the Product. The Last Week is defined by the 'End of Week Day' specified in the Business Setup screen.
- **\$Last Month** - The \$ Last Month field displays the total dollar value sold in the Last Month for the Product. The Last Month is defined by the Default Date Range (Calendar or Business) set in the General Setup screen.

## Show Me...

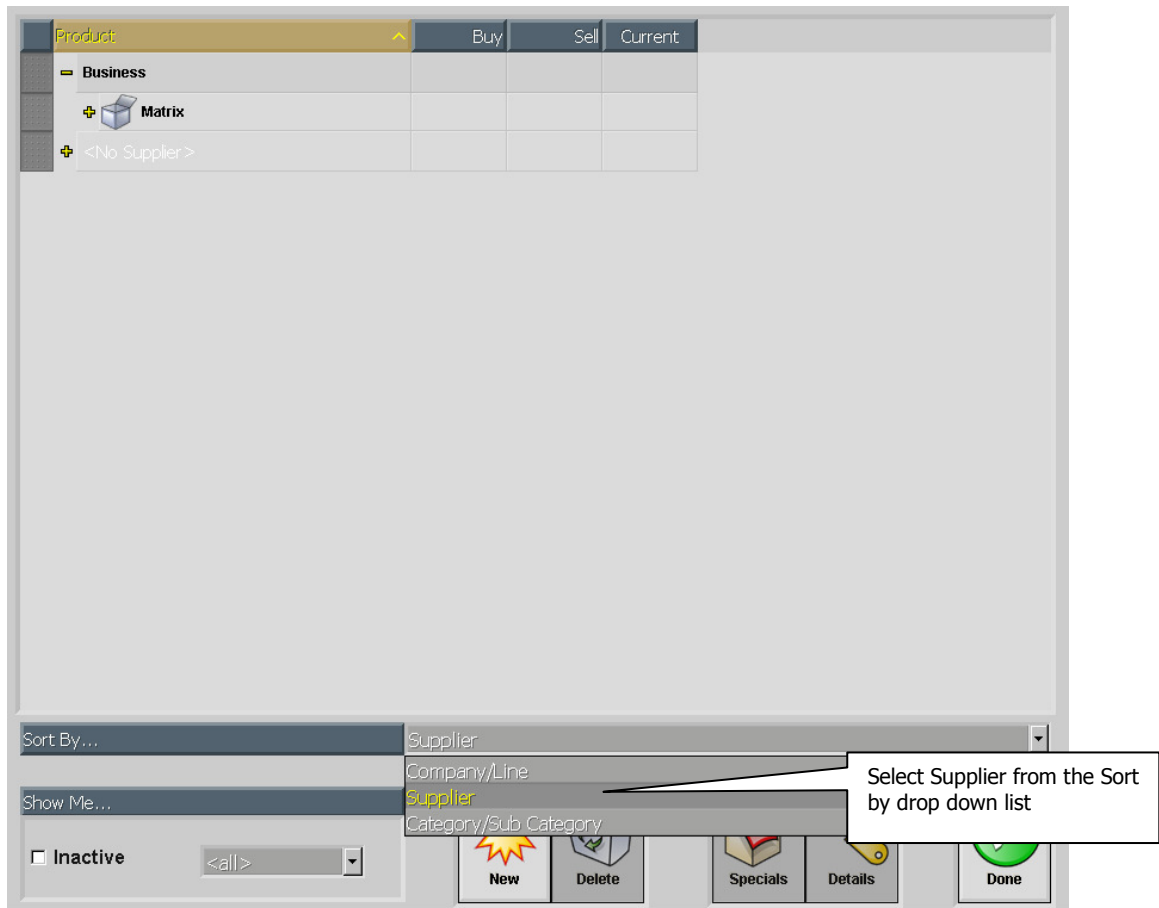
In the bottom left-hand corner of the Product screen you will see the Show Me Section. This section allows you to choose which type(s) of products you are viewing in the Product Screen. Click and scroll to select either the <all>, Professional or Retail options from the drop down list. The last selected option will be saved.

# Step 8: Associating Products with Suppliers and Categories

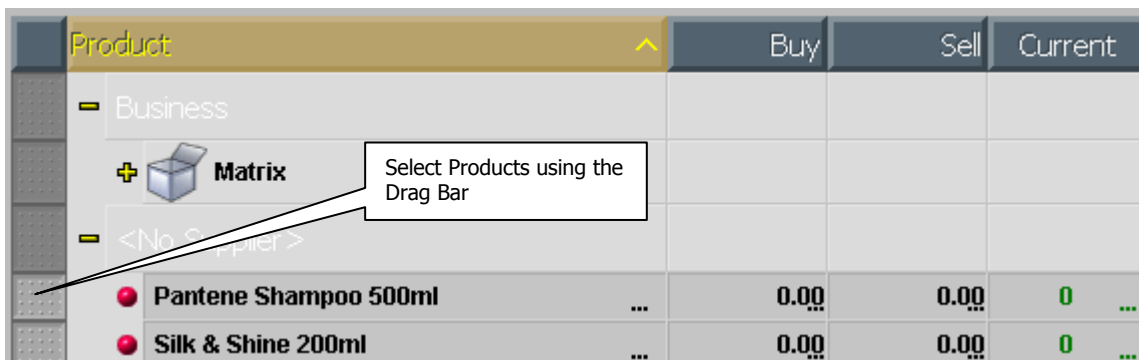
## Associating a Product(s) with a Supplier

When new Products are entered into Shortcuts, they will be associated with a Supplier (organisation that distributes (supplies) Products to your business) according to the Supplier default option set in the relevant Companies' Details window (In the Product Screen). However, you may need to either change a Supplier Association for particular Product(s) or Associate a Product(s) that is not currently Associated with a Supplier.

From the Navigation bar select the **Stock Menu** then the **Products** icon, the product screen will appear.



1. Click and scroll to select **Supplier** from the Sort by... drop down list. The Product list will be sorted by Suppliers.
2. Un-associated products are listed under <No supplier>, double click on **No Supplier**.
3. Using the Drag Bar, click to **select the relevant Product(s)** you want to associate with a Supplier. The selected Product(s) will appear shaded.



- Click within the **shaded area** on the **Drag Bar** and without lifting your finger drag to move the selected Products into the relevant position under the chosen Supplier.
- Lift your finger to **release the Product(s)** into its new position.

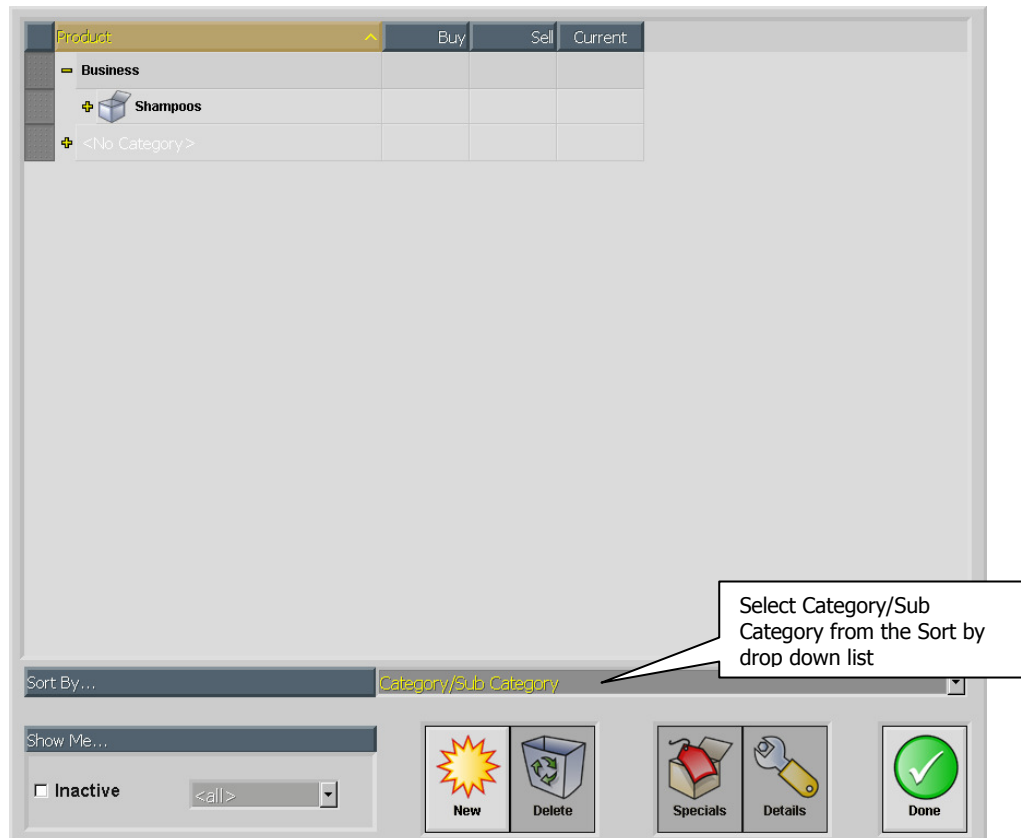
Product	Buy	Sell	Current
Business			
Matrix			
Head & Shoulders 500ml	3.45	5.99	2
Pantene Shampoo 500ml	0.00	0.00	0
Silk & Shine 200ml	0.00	0.00	0
<No Supplier>			

**Note:** When a product is associated with a supplier, Shortcuts will set this supplier as the default. However, when ordering products you can specify any product to be ordered from any supplier.

### Associating a Product(s) with a Sub Category

A Product must be associated with a Sub Category that in turn belongs to a Category. When new Products are entered into Shortcuts, they will be associated with a Sub Category according to the Category default option set in the relevant Companies' Details window. However, you may need to change a Sub Category association for particular Product(s) or Associate a product(s) that is not currently Associated with a Sub Category.

- Click and scroll to select **Category/Sub Category** from the Sort by... drop down list. The Product list will be sorted by Category/Sub Category.



- Un-associated products are listed under <No Category>, double click on **No Category**.
- Using the Drag Bar, click to **select the relevant Product(s)** you want to associate with a Sub Category. The selected Product(s) will appear shaded.

Product	Buy	Sell	Current
Business			
Shampoos			
<No Category>			
Head & Shoulders 500ml	3.45	5.99	2
Pantene Shampoo 500ml	0.00	0.00	0
Silk & Shine 200ml	0.00	0.00	0

4. Click within the **shaded area** on the **Drag Bar** and without lifting your finger drag to move the selected Products into the relevant position under the chosen Sub Category.

Product	Buy	Sell	Current
Business			
Shampoos			
Dandruff Shampoo			
Head & Shoulders 500ml	3.45	5.99	2
Silk & Shine 200ml	0.00	0.00	0
Pantene Shampoo 500ml	0.00	0.00	0
<No Category>			

5. Lift your finger to **release the Product(s)** into its new position.

### Additional Information:

- You can only **delete a company, line or product** if there is no history associated with this company, line, product (eg it has never been sold at point of sale or ordered). If the product has been sold it can be made inactive by removing the active tick from the product.
- When a **supplier, category or sub category is deleted**, any associated products will not be deleted; they will simply be moved into the unassigned area.
- Editing a supplier, category, sub category, company, line or product name** is only for rectifying mistakes. If a name is changed then all histories will refer to the new name.
- The **pictures** (Company, suppliers, categories, sub categories and lines) must be saved a bmp file. A picture must be 80 pixels (dots) wide by 80 pixels high and have 256 colours.