



## Quick tips and shortcuts

### Commercial Systems Customer Day 2010



#### QUICK CASH SALE

Ctrl Q. takes you to the first line in a cash sale.

#### QUICK SALES LINE ENTRY

Enter the quantity followed by a comma and the product code or description to enter the line and move to the next line.

#### MULTIPLE PRODUCT CHOICE IN ONE SCREEN

'Marking' when a search of a product creates a multi product screen, tab through the list and enter the required quantity against the relevant lines. Use 'enter' to bring all chosen lines to the sales order.

#### CATALOGUE

Alt's' or click 'tools' at the top of the screen. Choose product catalogue.

#### ORGANISE

Click on the organise icon at the top of the screen. Right click on the first field of the sales line. Choose 'create line group'. Save  
Hold mouse, click on chosen line and drag to selected group.

#### SCREEN PREVIEW

'Alt F' or mouse click on 'File'. In the list is the preview option.

#### DISCREET ORDER MARGIN

The four digit number in the centre at the bottom of the screen is the margin without the decimal point.

#### LINE INFORMATION FIELD USING THE KEYS

Alt, tab back through the sales line to the first field. Press the 'application key'.

#### ARROWS ON STOCK CARD SCREEN

In the Product record, detail option choose 'card' the arrows will show the stock decreasing and the stock increasing when formatted onto the screen.

#### RETURN TO NEW SALES ORDER LINE

F3 takes you to the bottom of the order ready to add the next line.

#### USE OF FOREIGN CURRENCY IN THE CASH SCREEN

Enter the foreign currency in cash screen, for example, EUR or \$ when system enabled.

#### QUICK REPORT

Go to report desktop. Click on 'quick' icon. Follow wizard arrow keys.

(Please turn over)





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#### REVIEW DATE ON A QUOTE

In a quotation press 'Alt Q' or click on the 'quote' logo on the left hand side of the screen. In the new screen there is a field called 'Follow up date' a report will show the user what quotations need to be followed up.

#### PRICES FIXED UNTIL

In a quotation press 'ALT Q' or click on the 'quote' logo on the left hand side of the screen. In the new screen there is a field called 'Prices fixed until'. This date will prompt the user if the date has past and offer the choice of keeping the old price or choosing the current price.

#### SPACEBAR FOR LINE SELECTION IN A QUOTE

When in an order, pressing F12 brings up the customers existing quotations. On a quotation line, pressing the spacebar will open up the lines in that quotation.

#### IMPORTING DATA TO AND FROM EXCEL

To - on the top line of a grid, using CTRL right click will copy all the lines. Go to excel and 'paste' to drop the selected lines into a spreadsheet.

From - in an excel spreadsheet, using the product code and quantity, copy the selected rows and go to the sales order. Select 'lines' at the top of the screen. Select 'paste special' to import the lines into the sales order.

#### ROUNDING

Within the customisable grid, there is an option called 'Rounding'. Once chosen, this field will enable the user to 'tab through' or 'click on' to enter the number of M<sup>2</sup> and convert to each.

#### DRAG AND DROP

In the bottom right hand screen there is a 'basket' logo. Position the mouse over this, hold down the left side and drag the contents to populate the order.

#### F7 FOR CRM TASK

In the F7 option for an account customer, click on 'task' at the top of the screen.

#### BOTTOM BANNER CUSTOMISING

In the bottom section of the screen there are four fields available for values relevant to the product line you are on. With priority these can be customised by 'right clicking' on the value and choosing another.

#### BOLD TRUCK

Icon on the right hand side at the bottom of the screen, shows if there are site addresses available.

#### HIDE COMPLETED LINES

In 'lines' option at the top of the screen choose the 'hide completed line'.

#### STORED ITEMS

Holding down the CTRL key and pressing the 'Z' key will bring in stored items, one line at a time.

#### A FOR ADVICE IN ORDER NUMBER FIELD

Inserting an 'A' in front of an advice note number in the order number field will bring in the relevant sales order.

#### I FOR INVOICE IN ORDER NUMBER FIELD

Inserting an 'I' before an invoice number in the order number field will bring up the relevant Sales order.

#### 'T' FOR DATE CHANGE

When in a date field, pressing the 'T' key will change the date to today's date. Holding down the 'up' arrow key will move the date forward. Holding down the 'down' arrow key will move the date backwards.