

# Keyboard and System Shortcuts

ANDREW

Today was pretty busy, how'd you handle that afternoon rush?

ROBERT

It was a bit of a struggle, I'm not the fastest at Point of Sale. I felt like I was playing catchup all day!

ANDREW

Did you know that the system has a keyboard and system shortcuts that can speed things up a bit? Once you get a handle on them, they can really help out.

ROBERT

Really? What do you think about giving me the rundown?

Pick a topic to come along with us to learn more about keyboard and system shortcuts!

## Topics

- Keyboard Only Order Entry
- Quick Entry and Edit
- Product Searches and Prompts

## Keyboard Only Order Entry

You can make selections or maneuver through almost any form without using the mouse.

Let's enter a sales order using this method.

When you start a new order, the cursor is ready for you to enter the Customer.

We'll use the word drywall to search for drywall customers.

The system shows a list of customers having the word drywall in their Name.

You can scroll through the list using the arrow keys, and when you find the customer that you want, highlight it using the arrow keys, and then press F12 to select it.

If the Name you want is one of the first nine listed, it's faster to select it by pressing the associated Function Key.

We'll press F3 to select Seacoast Drywall.

The system moves the cursor to the Quick Entry field, ready for you to enter the first product.

You can either scan the barcode or enter the product code.

When more than one product matches, the system opens the Find Product window with the first match highlighted. Select the product to add.

The system opens the Order Line Properties window, where we enter the selling Quantity on the Price Negotiation tab.

You can enter a different Selling Price or press Enter to use the one listed.

At this point, the OK button appears surrounded with a dotted line to show that this is the selected option.

When you are finished making adjustments for this item, press Enter to close the line and add the product to the order.

You can do the same thing by pressing the F12 key.

The cursor is ready for you to enter the next product.

You can jump to any field on a form using Hotkeys identified by the letter in the underscored fieldname.

To do so, press Alt and the Underscored letter.

For example, change the Sale Type for the order by pressing Alt and e.

For fields that have a drop-down list of options, press the up or down arrow key to scroll through the choices.

Alternatively, if you know the first letter of the option, enter that.

Here we press W to change the Sale type to Will Call.

You can also move between fields on a form using Tab and Shift Tab.

Tab moves the cursor forward and Shift Tab moves it backwards.

You can select most buttons or tabs using a Function or Named key such as Insert, Delete, or Esc.

To enter a Note, press the F9 key.

You can go between the Special Instructions and Notes tabs using the F1 and F2 keys.

When you enter the Note details, press F12 to save it, or Esc to cancel without saving.

The system shows that you entered a note by adding an asterisk to the Notes button.

The Complete button has two keyboard alternatives including F12 or the Hotkey combination of Alt and m.

Pressing either saves, and closes the sales document.

## Quick Entry and Edit

You can take advantage of the Quick Entry options to enter items, quantities, and prices.

Once you select a preferred method, the system saves it as your preference.

The default option is Product Details.

Once you enter or scan the product, the Order Line Properties window opens, and you can enter the Quantity and price details.

If you rarely change the Negotiation settings, you can choose to add products using the Product, Qty, Price or Product,Qty methods.

You can change the UOMs for products that have more than one.

Use the Tally Input window for Tally products.

Those with permission can negotiate the Margin % here.

When you press Enter on the Price field, the system adds the line and BisTrack is ready for the next item.

Now, let's set the method to Product, Qty and enter a product code.

With this method, you cannot change the Price and Price UOM.

Once you enter the quantity, the system adds the line to the order.

When using either Product, Qty, Price or Product, Qty Only, you can still Negotiate pricing as needed by double-clicking the line or using the F2 Edit option to open Order Line Properties.

Another way to edit the Qty and Price fields is to click the first line that you need to change.

The cursor appears in the Qty field. Overwrite the amount and then press Enter.

The cursor jumps to the Sell Price field. Change it or press Enter to skip.

The cursor jumps to the Qty field of the next product on order.

Continue to make changes as needed.

## Product Searches and Prompts

Let's look at some options that increase the speed of finding products and entering quantities on sales documents.

When using the product search function, set the Options to Exact Match First, Full Search if No Match.

To demonstrate how this works, we'll start by turning this selection off.

While there is an exact match for the product code we entered, the Find Products window opens to show all products with the same characters of the code entered.

Let's turn the Option back on.

The system shows only the exact match and you are ready to enter the Qty.

For most products, set the Selling option Prompt for quantity on orders to No.

When you enter the product, the system automatically adds it to the order with a Qty of one.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

---

## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).



### Corporate Office

804 Las Cimas Parkway  
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

### Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

### Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

### Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

### Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298