

Keyboard and System Shortcuts Transcript

BisTrack provides keyboard alternatives for selecting options, maneuvering through menus, and using entry forms. You can use these shortcuts to complete transactions efficiently. We'll begin by entering a sale using Keyboard Only Order Entry.

Then, we'll show you some Options that speed up sales entry, Quick Entry and Edit methods, and Processing Options that reduce keystrokes. For more information on other ways to improve POS processing, review the document called Enhancing POS Speed, found in the course materials section.

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 F12 to select the highlighted customer, 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.

BisTrack opens the Order Line Properties window, where we enter the selling Quantity on the Price Negotiation tab. Enter a different Selling Price or press Enter to use the one listed. At this point, the system shows the OK button surrounded with a dotted line to indicate that this is the selected option. When you are finished making adjustments for this item, simply 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.

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 Quick Entry. 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 Qty and Price or Qty Only 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 Qty Only and enter a product code. With this method, the Price and Price UOM are not accessible for change. Once you enter the quantity, the system adds the line to the order.

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

Finally, we'll introduce options that will 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.

You can maximize POS processing speed and staff efficiency by using keyboard shortcuts and setting certain System, Product Search, and Prompt options. You can also customize the entry method used that limits the keystrokes needed to enter a sale.

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