

# ShortCuts SE

## Order Screen

Canned <u>J</u> obs list = <b>Alt + J</b>	<u>P</u> arts entry = <b>Alt + P</b>
Che <u>C</u> k Profit = <b>F12</b>	Part <u>K</u> it list = <b>Alt + K</b>
C <u>o</u> nvert to Invoice = <b>Alt + O</b> [RO]	Pay/ <u>P</u> ost Invoice = <b>Alt + O</b> [Invoice]
C <u>o</u> nvert to Order = <b>Alt + O</b> [Estimate]	Print = <b>Ctrl + P</b>
<u>C</u> ustomer = <b>Alt + C</b>	Re <u>p</u> air = <b>Alt + A</b>
E <u>s</u> timator = <b>Alt + S</b>	<u>R</u> evision screen = <b>Alt + R</b>
E <u>x</u> it (WIP) = <b>Alt + X</b>	S <u>u</u> blet entry = <b>Alt + U</b>
H <u>i</u> story = <b>Alt + T</b>	TS <u>B</u> s = <b>Alt + B</b>
<u>L</u> abor entry = <b>Alt + L</b>	<u>V</u> ehicle screen = <b>Alt + V</b>
<u>M</u> aintenance Schedules = <b>Alt + M</b>	WIP screen = <b>Esc</b>
<u>N</u> otes entry = <b>Alt + N</b>	

## Revision Screen

Canned <u>J</u> obs list = <b>Alt + J</b>	Sub-Estimate <u>1</u> = <b>Alt + 1</b>
Che <u>C</u> k Profit = <b>F12</b>	Sub-Estimate <u>2</u> = <b>Alt + 2</b>
<u>C</u> ustomer = <b>Alt + C</b>	Sub-Estimate <u>3</u> = <b>Alt + 3</b>
E <u>s</u> timator = <b>Alt + S</b>	Sub-Estimate <u>4</u> = <b>Alt + 4</b>
E <u>x</u> it (WIP) = <b>Alt + X</b>	Sub-Estimate <u>5</u> = <b>Alt + 5</b>
H <u>i</u> story = <b>Alt + T</b>	Sub-Estimate <u>6</u> = <b>Alt + 6</b>
<u>L</u> abor entry = <b>Alt + L</b>	Sub-Estimate <u>7</u> = <b>Alt + 7</b>
<u>M</u> aintenance Schedules = <b>Alt + M</b>	Sub-Estimate <u>8</u> = <b>Alt + 8</b>
<u>N</u> otes entry = <b>Alt + N</b>	Sub-Estimate <u>9</u> = <b>Alt + 9</b>
<u>O</u> rder screen = <b>Alt + O</b>	S <u>u</u> blet entry = <b>Alt + U</b>
<u>P</u> arts entry = <b>Alt + P</b>	TS <u>B</u> s = <b>Alt + B</b>
Part <u>K</u> it list = <b>Alt + K</b>	<u>V</u> ehicle screen = <b>Alt + V</b>
Print = <b>Ctrl + P</b>	WIP screen = <b>Esc</b>
Re <u>p</u> air = <b>Alt + A</b>	

## History Screen

<u>C</u> ustomer = <b>Alt + C</b>	<u>R</u> evision screen = <b>Alt + R</b> [5 tab view]
<u>D</u> etail = <b>Alt + D</b>	Search <u>h</u> = <b>Alt + H</b>
E <u>x</u> it (WIP) = <b>Alt + X</b>	U <u>n</u> -post selected invoice = <b>Alt + N</b>
<u>O</u> rder screen = <b>Alt + O</b> [5 tab view]	<u>V</u> ehicle screen = <b>Alt + V</b>
Print = <b>Ctrl + P</b> [Invoice open]	WIP screen = <b>Esc</b>

There are numerous keyboard shortcuts in additional program screens; watch for the underlined letters on buttons and menu items.

**NOTE:** If you do not see underlined letters, press the Alt key and these will appear.

**TIP:** To make underlined letters always visible, right-click on the desktop, select Properties, Appearance tab. Click Effects, and then un-check this settings box:

Hide underlined letters for keyboard navigation until I press the Alt key

Then click OK to save it.



# ShortCuts SE

## Common to Most Screens

Batch Payment [Utilities] = **F5**  
 BPS menu = **Alt + B**  
 Configurations menu = **Alt + C**  
 Counter Sale = **F11**  
 Edit menu = **Alt + E**  
 File menu = **Alt + F**  
 Find Customer [Utilities] = **F3**  
 Find History [Utilities] = **F4**  
 Help [context + related videos] = **F1**  
 Help menu [General] = **Alt + H**  
 Inventory = **Alt + I** [ManagerPlus]  
 New [EST/RO] Order = **F6**  
 New Estimate = **F8**  
 New Repair Order = **F9**  
 New Invoice = **F10**  
 Quick Estimate = **F7**  
 Spell Check = **F2** [text fields]

Training Videos [How Do I?] = **Alt + G**  
 Utilities menu = **Alt + U**  
 View menu = **Alt + W**

## <<< Navigation Commands >>>

Advance to next entry field = **Tab**  
 Close a window/dialog box = **Esc**  
 Open a drop list = **Alt + Down Arrow**  
 Place a check in checkbox = **Spacebar**  
 Quit current program = **Alt + F4**  
 Reverse to previous field = **Shift + Tab**  
 Switch programs = **Alt + Tab**

## <<< Editing Commands >>>

Copy from current location = **Ctrl + C**  
 Cut [remove] from location = **Ctrl + X**  
 Paste from Cut/Copy action = **Ctrl + V**  
 Undo text change = **Ctrl + Z**

## WIP Screen

Detail = **Alt + D**  
 Display = **Alt + Y**  
 Order screen = **Alt + O**  
 Open highlighted order = **Enter**

Payment = **Alt + P** [RO/INV only]  
 Post = **Alt + T** [INV only]  
 Scheduler = **Alt + C**  
 Select order = up/down **arrow keys**

## Customer Screen

Company list = **Alt + M**  
 Exit (WIP) = **Alt + X**  
 History = **Alt + T**  
 Name = **Alt + A** [Customer list]  
 Order screen = **Alt + O**

Revision screen = **Alt + R**  
 Next = **Alt + N** [Vehicle screen]  
 Vehicle screen = **Alt + V**  
 WIP screen = **Esc**

## Vehicle Screen

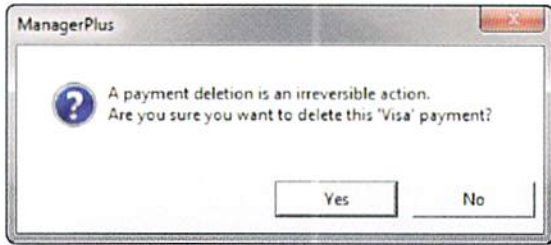
Customer = **Alt + C**  
 Date fields = up/down **arrows**  
 Exit (WIP) = **Alt + X**  
 History = **Alt + T**  
 License = **Alt + L**

Memo = **Alt + M**  
 Next = **Alt + N** [Order screen]  
 Order screen = **Alt + O**  
 Revision screen = **Alt + R**  
 WIP screen = **Esc**

## How to Make a Payment Correction

### A) Correct a payment on an open order:

1. Click on **Options** and then **Apply Payments**.
2. Select **History**, highlight specific payment.
3. Click on **Delete Payment**. Payment amount is due and payable once again.



4. Click on **Pay**; process with preferred payment type.

NOTE: Replace the deleted payment with exactly the same amount so that any reports that include this invoice will still be correct.

### B) Correct a payment in the History screen:

1. Find the customer with **Utilities** -> **Customer screen** and lookup invoice/payments in the **History** screen.
2. Double-click on the invoice and use the handy **Payment History** shortcut button.

Options | **Apply Payments**

Apply Payments

Customer Name BARUCH, RON  
Charged Balance \$404.80  
Credit Balance \$0.00

Charged Balance does NOT include this Invoice.

Invoice Amount 570.86  
Amount Paid 0.00  
Invoice Balance 570.86

Date 06/18/2013

Payment Type MasterCard

Payment Amount 570.86

Check / Reference #  
Authorization # 18927411

History | Apply Credit | Pay | Cancel

Delete Payment

Utilities

Customer Screen

History

Payment History

Follow same steps as shown above in method A).

Payment History table will display all payments for the currently selected invoice. It can also show all payments received from that customer for work performed at the shop.

Payment History

Display all payments for current Invoice | Display all payments for Customer

Date	Invoice #	Amount	Paid by	Check / Reference #	Authorization
12/4/2011	0038211	100.00	Cash		
12/2/2011	0038169	200.00	Cash		
12/2/2011	0038169	400.00	Visa		
10/27/2011	0035935	21.86	Cash		
10/27/2011	0035598	80.00	Cash		
9/7/2011	0035598	52.31	Visa		
9/7/2011	0035598	100.00	Visa		
8/6/2011	0035935	40.00	Cash		
8/6/2011	0035598	40.00	Cash		
7/20/2011	0035935	25.00	Check	1114216640	
7/12/2011	0035598	40.00	Check	1113492612	

Print Receipt | Delete Payment | Ok



## Manager SE 6.5 Management Reports - Keep Shops On Top of Ops!

Which parts required for repair orders?	Business Summary
Parts required for ROs; who are they ordered from?	Canned Job Usage
Parts required; items we don't stock (but should?)	<b>Committed Parts non Stock Parts</b>
<b>What do we actually have tied up in total dollars?</b>	<b>Current Inventory</b>
Which items are missing Description, Category, etc?	Incomplete Inventory Items
<b>How long have all these parts been sitting on the shelf?</b>	<b>Inventory Age</b>
Are we following our pricing goals or not?	Inventory Price Deviation
Which parts were sold that came from any vendor?	Inventory Part Sales
<b>How many parts from XYZ Auto have we really sold?</b>	<b>Inventory Part Sales By Vendor</b>
Sold part(s) to which customer? When? Invoice #s	Inventory Part Sales Detail
Which system parts have Alt P/Ns? (aliases)	Inventory And Alt Part No.
<b>Which parts were to be returned and not billed out?</b>	<b>Inventory Returns</b>
Are we really selling more tires than last April?	Inventory / Sales History (by category)
What parts are we running low on? Shown in P/N order	Low Inventory By Part Number
What are we running low on; who do we buy these from?	Low Inventory By Vendor
<b>Where have we changed Quantity On Hand numbers?</b>	<b>Manual Quantity Update</b>
Where have we changed Quantity On Hand by P/N?	Manual Quantity Update By Part NO.
<b>How many non-stocked items are we actually selling?</b>	<b>Non Stock Parts Purchased</b>
What's all this stuff worth, right this minute?	On Hand Inventory Value
<b>How much do we have tied up just in Electrical? (etc)</b>	<b>On Hand Inventory by Category</b>
Which parts required have actually been ordered?	Parts On Order
Which parts are needed for all of shop's "printed" ROs?	Pick List
<b>Which parts didn't arrive? [Wait or buy elsewhere?]</b>	<b>Purchase Orders – Back Ordered</b>
What did we buy in the past within a date range?	Purchase Orders – Closed
What did we buy from XYZ parts within date range?	Purchase Orders – Closed Summary
Can I see parts not received by vendor & date range?	Purchase Orders – Open
Can I see all of my P.O. Parts not received yet?	Purchase Orders – Outstanding
<b>Items stocked that are ALREADY on order with vendor</b>	<b>Stock Items On Order</b>
Can I see only parts with stocking/reorder levels set?	Stocking Level Above Zero
How fast from parts ordered to parts delivery?	Vendor Response
How fast from ordered to parts delivery? Listed by part #	Vendor Response by Part Number
<b>Stocking + Reorder @ 00 but selling often? Set these up!</b>	<b>Zero Stocking Level Sales</b>
Count only parts in a specific category	Inventory Worksheet by Category
Count parts by part description	Inventory Worksheet by Description
Count parts by shelf or building location	Inventory Worksheet by Location
Count parts by part number sequence	Inventory Worksheet by Part Number