

10

Tips and Tricks to Run Your Business Better on Coreware

Shortcuts, settings and easy-to-miss buttons worth knowing.

1 Ctrl+K

2 Card scan

3 Inventory value

4 CoreY reports

5 Activity Log

6 Pinned pages

7 Desktop app

8 Staff schedules

9 Email preview

10 Action plans



Coreware

Jump anywhere with Ctrl+K (Cmd+K on a Mac)

Ctrl

+

K

or

Cmd

+

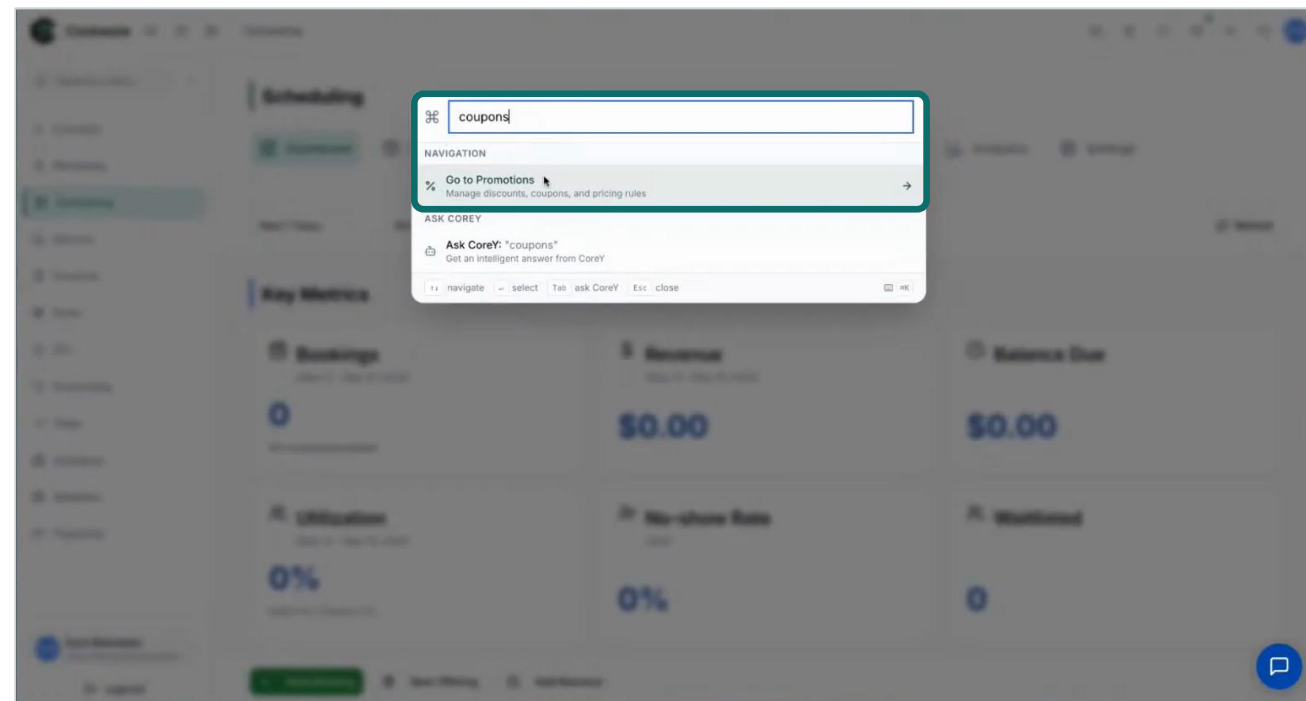
K

Press Ctrl+K (Cmd+K on a Mac) anywhere to open the navigator and type where you want to go. It matches loosely, so "coupons" finds Promotions. There's also a navigator icon.

Why it helps: No hunting through menus for a setting you rarely use.

How to do it

1. Press Ctrl+K, or Cmd+K on a Mac.
2. Type a word.
3. Pick the result.



Watch: [coreBLAST Ep. 13 at 1:15:59](#) · Demo data from the webinar · timestamp: 1:17:55

Try it: Type the name of the setting you always have to hunt for.

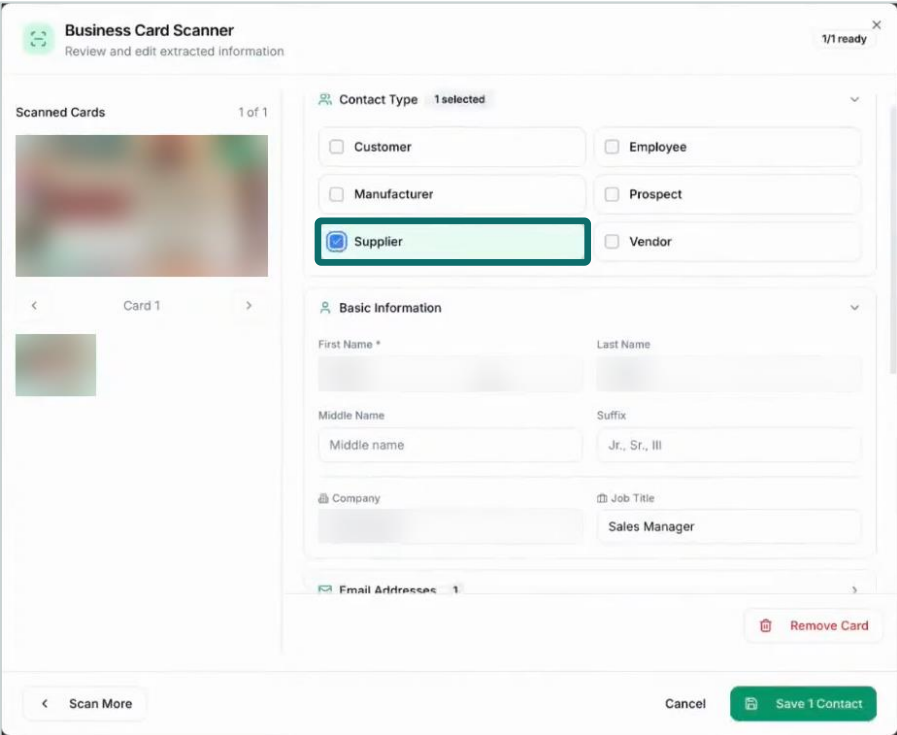
Scan a business card straight into your contacts

On the Contacts screen, click "Scan Card" and upload a photo of a business card. Coreware fills in the contact's details, including email, phone and address.

Why it helps: Add the contacts you meet at a trade show without typing in their details. This trick saves the Coreware team hours at every show, and we think it will help your team too.

How to do it

1. Go to Contacts and click "Scan Card".
2. Upload a photo of the card and check the details.
3. Pick the contact type, for example supplier.
4. Save.



The screenshot shows the 'Business Card Scanner' interface. On the left, under 'Scanned Cards', there is a thumbnail of a scanned business card labeled 'Card 1'. To the right, the 'Contact Type' section shows a list of options: Customer, Employee, Manufacturer, Prospect, Supplier (which is selected and highlighted with a green box), and Vendor. Below this is the 'Basic Information' section with fields for First Name, Last Name, Middle Name, Suffix, Company, and Job Title (pre-filled with 'Sales Manager'). At the bottom right, there is a 'Remove Card' button. At the very bottom, there are buttons for 'Scan More', 'Cancel', and 'Save 1 Contact'.

Watch: [2025 Year in Review at 1:40:16](#) · Demo data from the webinar · timestamp: 1:41:27

Try it: Scan the last business card you were handed.

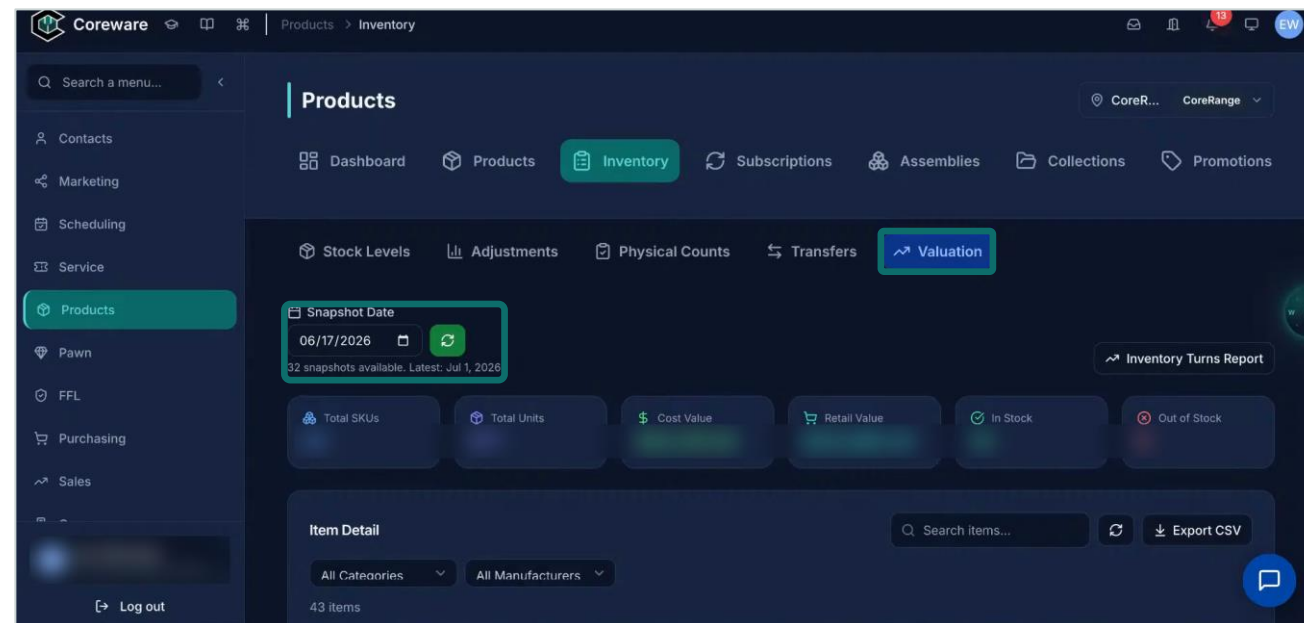
See what your inventory was worth on any past date

Coreware saves an inventory snapshot every night, so you can pick any day, see your inventory value and compare periods. If snapshots are missing, the screen says so.

Why it helps: Get your year-end inventory value without working backward from today's numbers.

How to do it

1. Open inventory valuation in Products.
2. Pick a date.
3. No snapshots? Run the backfill under Products › Settings › Utilities. It fills only the days you run it for.



Watch: [coreBLAST Ep. 18 at 1:43:12](#) · Demo data from the webinar · timestamp: 1:47:30

Try it: Check your inventory value for the last day of last month.

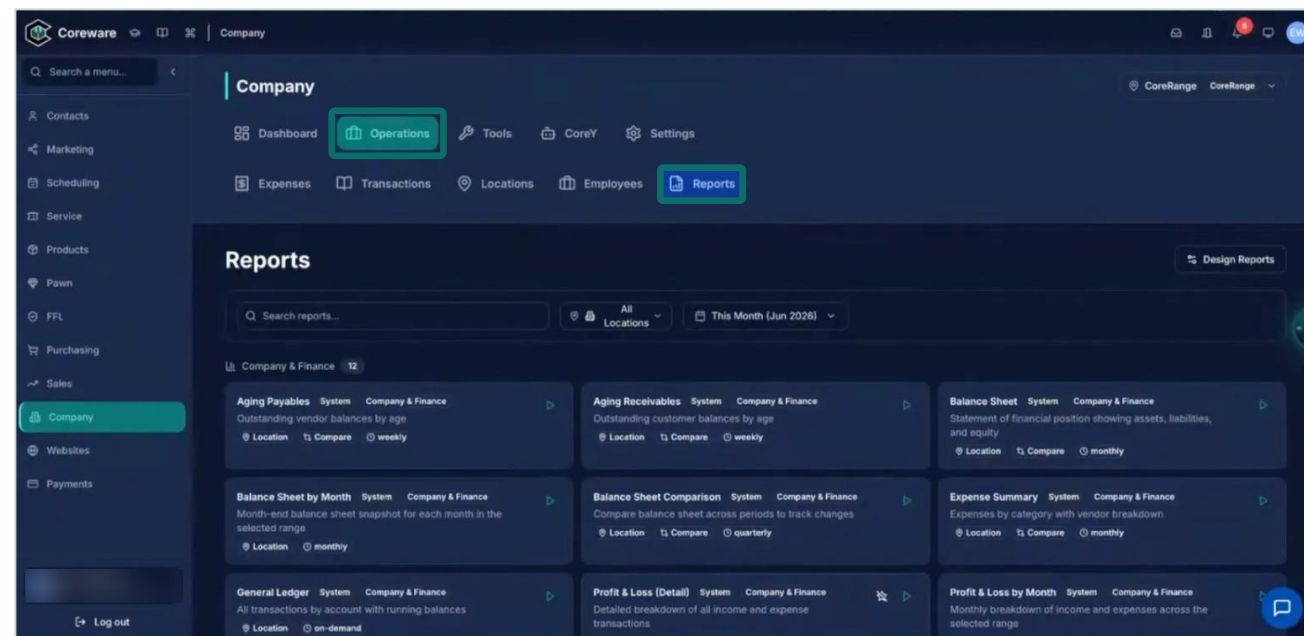
Generate custom reports with CoreY, directly from your live data

Tell CoreY the report you need, such as "Create a sales performance report by employee." CoreY builds it and saves it under Company › Operations › Reports.

Why it helps: Your sales and employee data stays in Coreware, and so does the report. You don't export anything to a spreadsheet or an outside AI tool to build it.

How to do it

1. Open Company › CoreY and describe the report you want.
2. Review what CoreY builds.
3. Reopen it any time under Company › Operations › Reports.



Watch: [coreBLAST Ep. 17 at 1:30:59](#) · Demo data from the webinar · timestamp: 1:30:59

Try it: Ask for a sales performance report by employee and check the totals against your register reports.

Note: Don't see Reports? Ask support to turn it on.

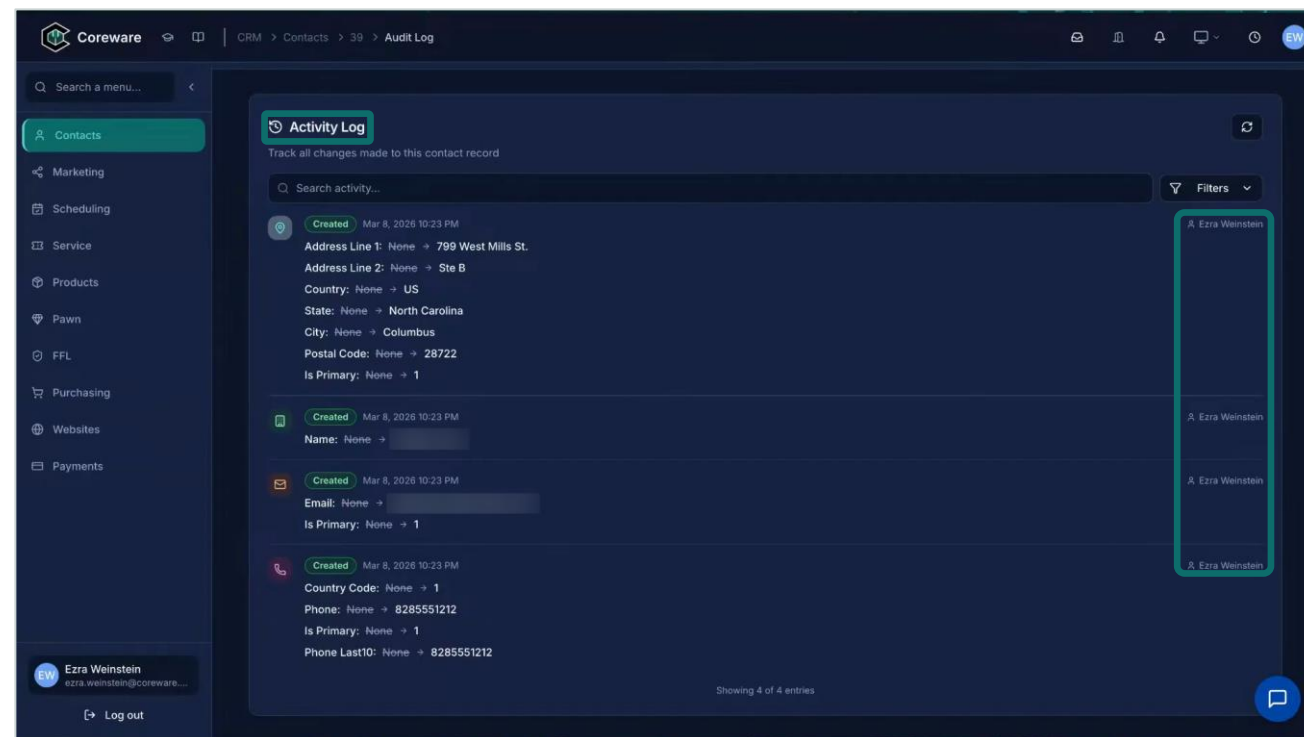
Use the Activity Log as your audit trail

Every contact record has an Activity Log tab that records who created the record and who changed it.

Why it helps: When several employees can edit customer records, the log shows exactly who changed a detail and when.

How to do it

1. Open Contacts and select a contact.
2. Click the Activity Log tab.
3. Review the entries: each one shows who made the change and what changed.



Watch: [coreBLAST Ep. 6 at 3:20:59](#) · Demo data from the webinar · timestamp: 3:21:25

Try it: Open the log on a customer whose details changed recently and see who made the edit.

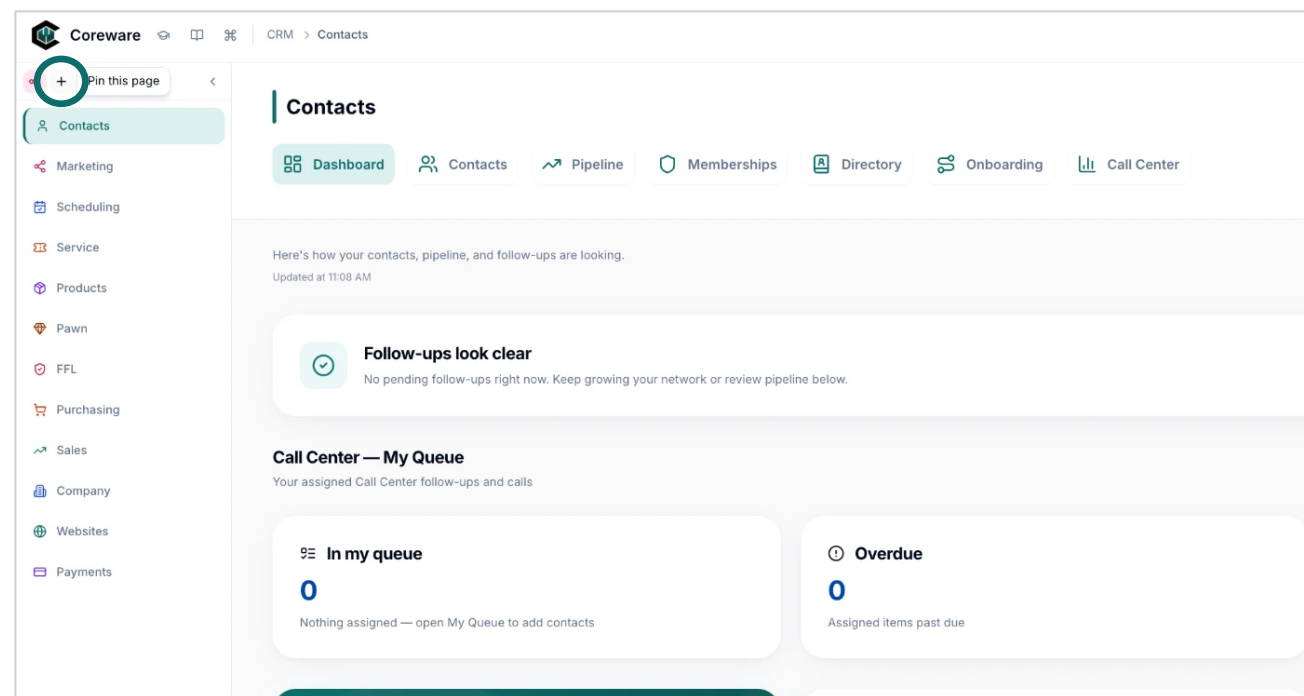
Pin the pages you use most

When you're on a page you want to pin, click the + button at the top of the left sidebar. The page is added to your quick navigation menu. Change a pin's icon under your initials › Account and credits › Navigation.

Why it helps: Get to the pages you use most in one click, instead of clicking through modules to find them.

How to do it

1. Open the page you want to pin.
2. Click the + button at the top of the left sidebar.
3. Open it any time from your quick navigation menu. A pin opens the page, not the tab you were on.



Watch: [coreBLAST Ep. 20 at 51:07](#) · Screenshot from the Coreware demo environment

Try it: Pin the three pages you open every morning.

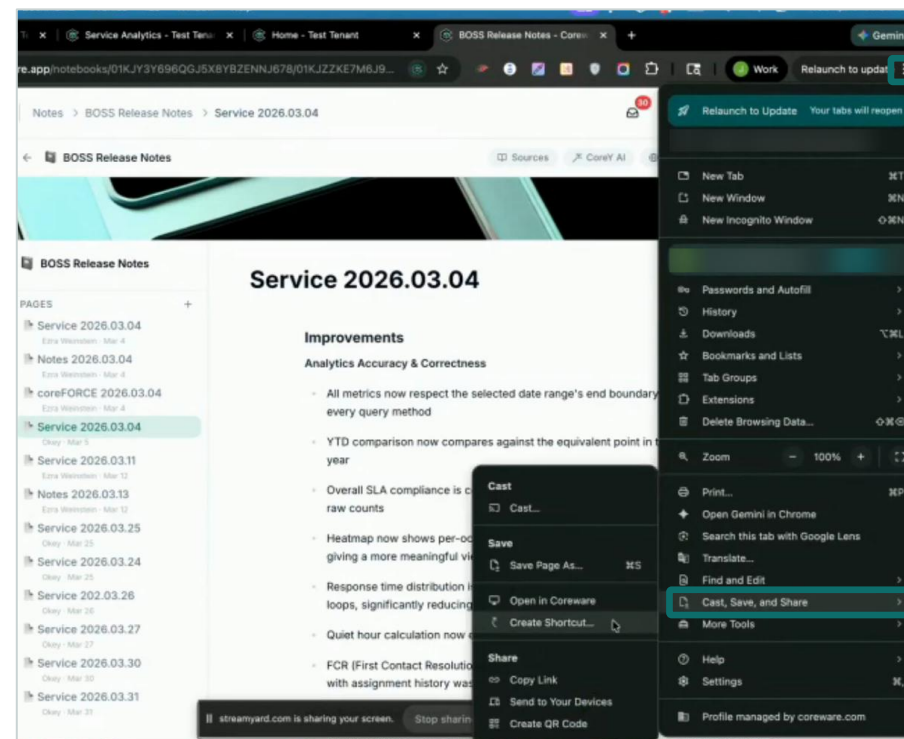
Install the Coreware app to your desktop and give each module its own window

In Chrome, install Coreware as an app with the install icon in the address bar, or from the three-dot menu › Cast, save and share. Then use File › New Window to keep the Ops Center or a notebook open on its own.

Why it helps: Your service queue stays in view while you ring up a sale or build an email.

How to do it

1. Install Coreware from Chrome.
2. Open the app.
3. Choose File › New Window.



Watch: [coreBLAST Ep. 9 at 59:22](#) · Demo data from the webinar · timestamp: 1:00:40

Try it: Open the Ops Center in a second window today.

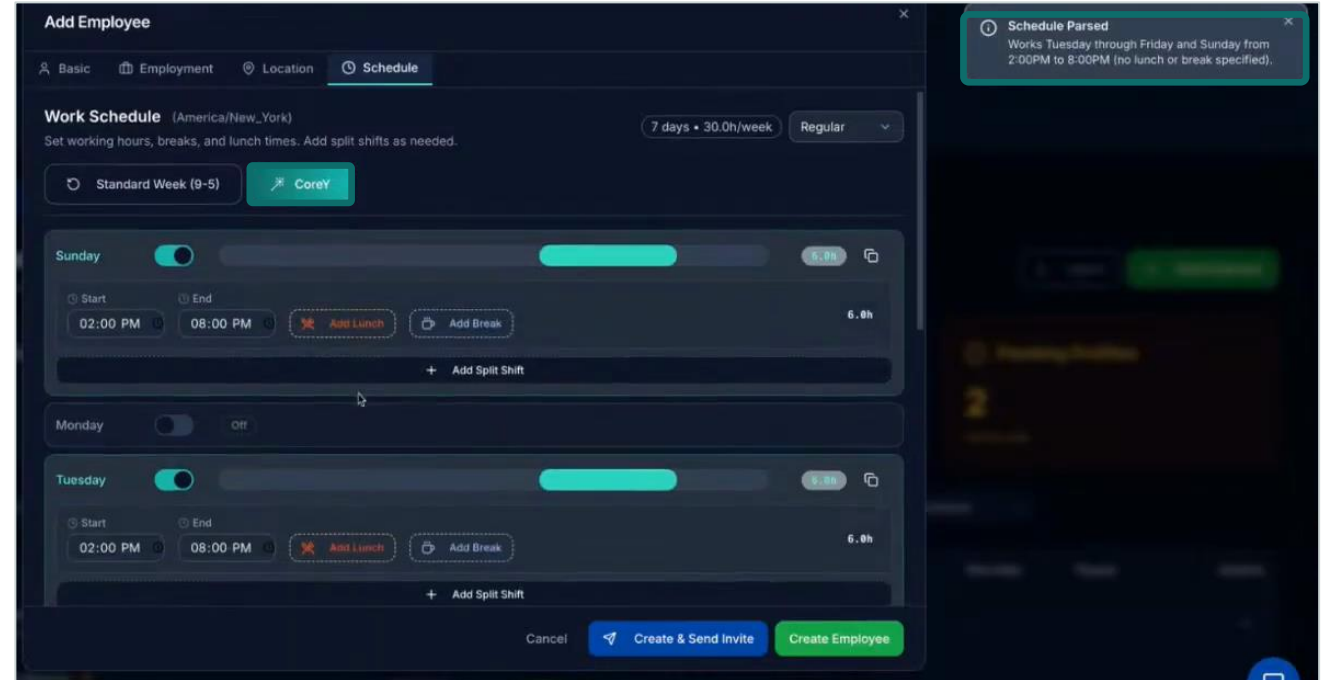
Set up a staff schedule by describing it to CoreY

In an employee's schedule, type the week the way you'd say it, for example "Tuesday through Friday and Sunday, 2 PM to 8 PM." CoreY sets up the schedule, and you can add lunch and breaks.

Why it helps: Set up a new hire's regular week by typing it out once, instead of clicking through each day and time.

How to do it

1. Open the employee's schedule.
2. Type the sentence.
3. Review what CoreY fills in, then save.



Watch: [coreBLAST Ep. 10 at 1:52:22](#) · Demo data from the webinar · timestamp: 1:53:20

Try it: Retype one employee's regular week and check the result.

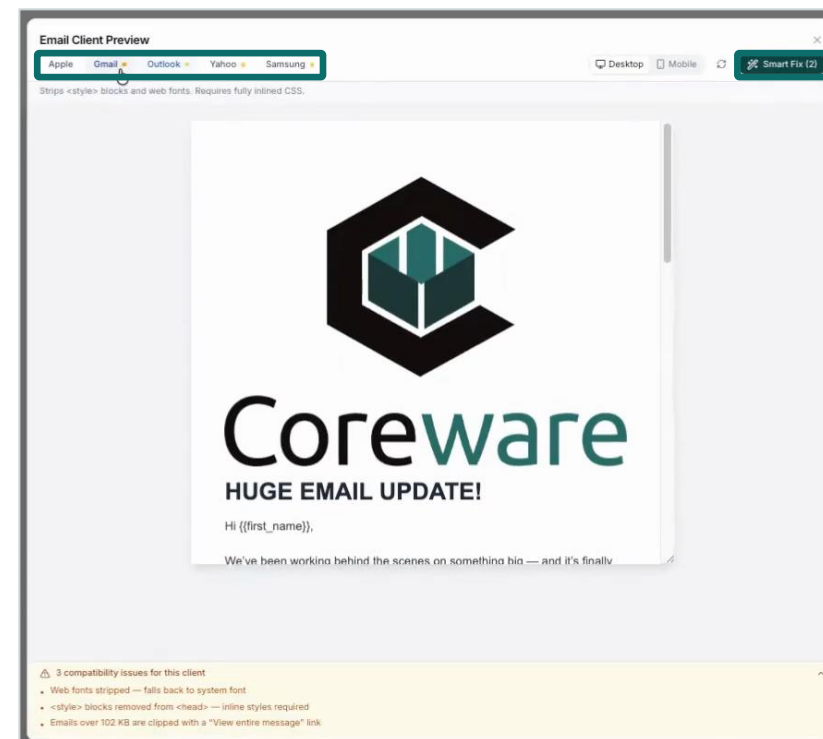
Preview an email from a customer's perspective

In the email builder, Client preview shows the email in Apple Mail, Gmail, Outlook, Yahoo and Samsung, and on mobile. Smart Fix repairs the problems it finds, and the personalization view shows the email as a specific contact.

Why it helps: You catch a broken layout or an empty greeting before your list does.

How to do it

1. Click Client preview (upper right).
2. Apply Smart Fix if needed.
3. Switch to the personalization view and pick a contact.
4. Click Save. Each Save creates a version you can go back to, and autosave doesn't.



Watch: [coreBLAST Ep. 9 at 1:20:24](#) · Demo data from the webinar · timestamp: 1:21:48

Try it: Preview your next email as one real customer before you send it.

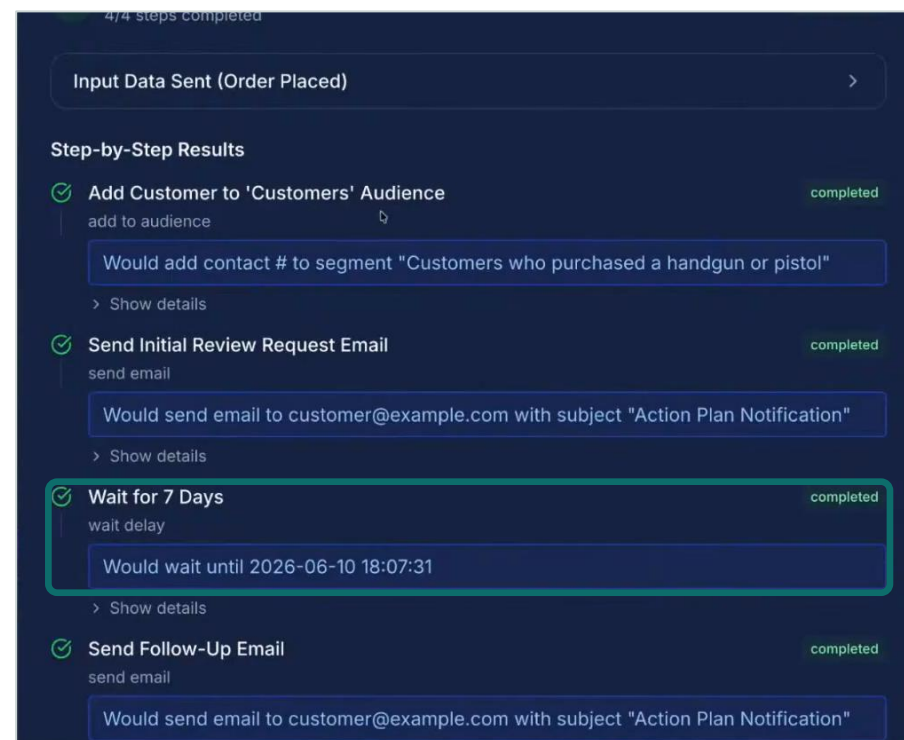
Test-drive your action plans

Test an action plan with a sample customer name, email and product. The test walks through each step so you can catch errors first.

Why it helps: Wrong timing or a missing step shows up in the test, not in a customer's inbox.

How to do it

1. Open the plan from Company › Tools, or press Ctrl+K and type "action plans".
2. Start a test and enter sample details.
3. Review each step.



Watch: [coreBLAST Ep. 16 at 2:05:45](#) · Demo data from the webinar · timestamp: 2:07:25

Try it: Test your newest action plan before you turn it on.

YOUR TURN

Try one tip this week, and pass another along to your team.

Each tip comes from a Coreware webinar replay. Click any tip on the right to watch the demo.



ALL 10 TIPS

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- 2 [Scan a business card straight into your contacts](#) ›
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