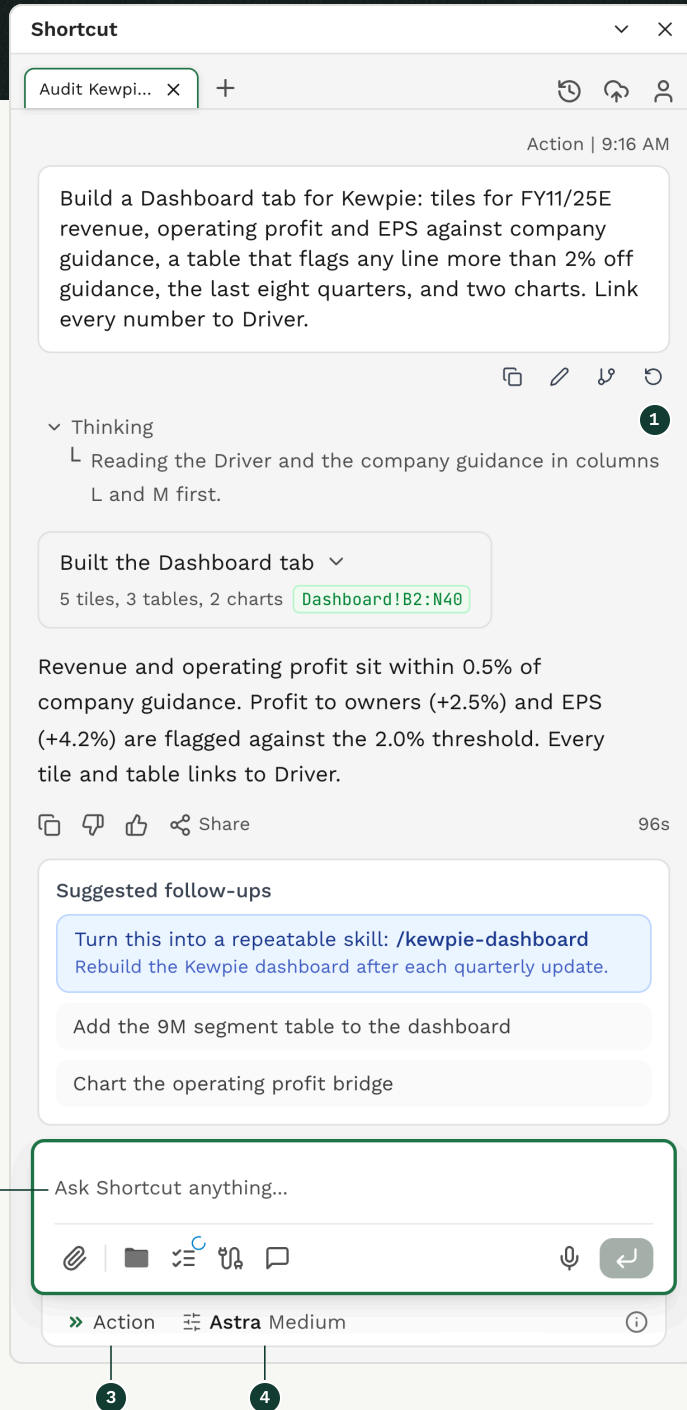


# Getting started with Shortcut



## Find your way around

Open Shortcut from Excel's Home tab.

- 1 Restore.** Puts the workbook back to before this message.
- 2 The chat box and its buttons:**
  - Attach.** Files of any type.
  - Workspace.** Shortcut's own computer.
  - Checks.** Two automatic reviews of Shortcut's work.
  - Connections.** Your tools and data providers, for Shortcut to use in chats.
  - Review mode.** Comments on cell ranges, sent together.
- 3 Mode and approval.** Action, Plan, Manage or Ask, and whether Shortcut pauses before each change.
- 4 AI model.** Which AI model does the work, with its effort and speed.

# 1

## Your first request

### Ask first

In **Ask** mode Shortcut cannot change the workbook. Start here with a workbook you did not build.

Audit this workbook. Explain how it is built and flag anything that looks off, with the cell. Change nothing.

Ask it to remember how the workbook is built, and later chats start from there.

- 1 Each flag names its cell.
- 2 **Ask**, under the chat box.

</> Reading Driver rows 6 to 53

The Driver builds each quarter from the cumulative filings: 3Q is nine months minus the first half. Three things to look at:

1. AM33: the 4Q FY24 tax rate is 5.1% (132 on 2,600), against 27 to 31% in other quarters.
2. AN30: a 12,185 extraordinary gain in 1Q FY25 lifts profit to owners to 12,777, so 1Q is not a run rate.
3. AQ15: the 4QE gross margin of 33.1% is above every actual quarter (28.4 to 31.4%).

Nothing was changed.

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41s

What would you like to know?

🔗 📁 📋 🗑️ 🗨️

🎤

↩️

Ask 📋 Astra Medium

ⓘ

### Write requests like a brief

Say how to build it, or Shortcut picks one of the million ways to build a dashboard.

Build a Dashboard tab for Kewpie: tiles for FY11/25E revenue, operating profit and EPS against company guidance, a table that flags any line more than 2% off guidance, the last eight quarters, and two charts. Link every number to Driver.

A good request names the output, what to compare, the rule, the periods and how to build it.

Give Shortcut the scope and context it needs: the cells in question, the filings, last quarter's workbook. Without them it has to guess.

On a big build, ask for a model map first: each tab, its drivers and how they link. Check the map, then build from it.

# 2

## When Shortcut changes the workbook

### Following a change

In **Action** mode Shortcut edits the workbook. Here it builds the dashboard from page 2.

- 1 Each of your messages has **Restore**, so you can go back to any point in the chat.
- 2 A new message while Shortcut works **steers** it without stopping it.
- 3 **Checks. Change Review** audits Shortcut's recent changes. **Skills & Memory Review** suggests improvements to your skills and memory. A blue ring means a review is running; amber means it found something.
- 4 **Stop.** Changes already made stay.

Action | 9:16 AM

Build a Dashboard tab for Kewpie: tiles for FY11/25E revenue, operating profit and EPS against company guidance, a table that flags any line more than 2% off guidance, the last eight quarters, and two charts. Link every number to Driver.

📄 ✎ 🔗 ↺

▼ Thinking

- ↳ Reading the Driver and the company guidance in columns L and M first.

Built the Dashboard tab ▼

5 tiles, 3 tables, 2 charts Dashboard!B2:N40

Steer Shortcut while it works by sending another message...

📎 📁 ☰ 🔗 💬

🎤 🗄️

### Approval

**Manual** pauses before each change and lists it. **Auto** goes ahead, and Restore still works. Changes to a skill always wait for you.

# 3

## Give it your files

### The workspace is Shortcut’s own computer

The paperclip attaches filings, workbooks, scans or a whole zip: any file type, up to 5 GB.

- 1

**Files** keeps everything you attach and everything Shortcut makes. **Backups**, the last tab, keeps a copy of the workbook from before each run.
- 2

**Workbook** keeps files with this workbook; **Global** shares them across your workbooks.

1

Files Skills Memories Prompts Templates Backups

Workbook 2

Search...

Name ↑

Kewpie filings 2020-2025.zip

Kewpie FY11-25 results.pdf

Kewpie\_2809\_KPI\_Review.pptx

work

dashboard\_charts.py

revenue\_margin.png

guidance\_gap.png

filings\_index.json

Upload files

### Projects are shared data rooms

A project holds the source documents for a company or a deal, shared with your team. With the workspace set to **Project**, Shortcut reads the project’s files and never changes them.

Shortcut 1.2.2 · Kewpie figures from published results; estimates are illustrative

4 of 8

# 4

## Mode and AI model

### The four modes

|        |                                                                                                                                                    |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| Ask    | Reads and explains; the workbook cannot change. For questions and reviews.                                                                         |
| Action | Edits the workbook, under your approval setting. For most work.                                                                                    |
| Plan   | Asks questions one at a time, then writes a plan to execute. For a large or loosely defined job.                                                   |
| Manage | Turns Shortcut into an orchestrator that splits the job among subagents, each scoped to one part. For long, extensive tasks; it uses more credits. |

### Which AI model

Your firm may show a different list. **Effort** sets how long the AI model thinks. **Fast** or **Ultrafast**, depending on the AI model and your firm’s settings, is worth the credits when speed counts.

MODEL

ACCURACY

SPEED

COST

GPT 6 Astra ✓ ⓘ

\$\$\$\$\$

Effort

Low

Med

High

Max

Speed

Flex

Normal

Fast

Ultrafast

Opus 5.5 ⓘ

\$\$\$\$\$

Fable 5.1 ⓘ

\$\$\$\$\$

GPT 6.1 Sol ⓘ

\$\$\$\$\$

Sonnet 5.5 ⓘ

\$\$\$\$\$

Show thinking

## 5

## Turn repeat work into a skill

## Build it, then test it

Shortcut builds the skill from the workbook before and after a quarter's update, with the release.

Tested on 4Q, the skill slips on the tax line: 16.3%, against 27 to 31% before.

|    | A                              | AJ           | AK            | AL            | AM           | AN            | AO            | AP            | AQ           |
|----|--------------------------------|--------------|---------------|---------------|--------------|---------------|---------------|---------------|--------------|
| 2  | <i>Fiscal year ending 30 /</i> | 11/24        |               |               |              | 11/25         |               |               |              |
| 3  | <b>FYE November</b>            | <b>1Q</b>    | <b>2Q</b>     | <b>3Q</b>     | <b>4Q</b>    | <b>1Q</b>     | <b>2Q</b>     | <b>3Q</b>     | <b>4Q</b>    |
| 31 | <b>Pretax profits</b>          | <b>8,951</b> | <b>10,507</b> | <b>11,580</b> | <b>2,600</b> | <b>18,705</b> | <b>10,143</b> | <b>11,260</b> | <b>7,409</b> |
| 32 | Corporation tax                | 2,416        | 3,285         | 3,395         | 132          | 5,570         | 2,894         | 3,058         | 1,208        |
| 33 | <i>Corporation tax rate</i>    | 27.0%        | 31.3%         | 29.3%         | 5.1%         | 29.8%         | 28.5%         | 27.2%         | 16.3%        |

1 16.3%: the skill took current tax only, 1,208 on pretax profit of 7,409.

## Correct it once

Almost. 4Q tax should be total income taxes, 13,627 including the 897 deferred, not current tax only. Fix it and update the skill.

|    | A                              | AJ           | AK            | AL            | AM           | AN            | AO            | AP            | AQ           |
|----|--------------------------------|--------------|---------------|---------------|--------------|---------------|---------------|---------------|--------------|
| 2  | <i>Fiscal year ending 30 /</i> | 11/24        |               |               |              | 11/25         |               |               |              |
| 3  | <b>FYE November</b>            | <b>1Q</b>    | <b>2Q</b>     | <b>3Q</b>     | <b>4Q</b>    | <b>1Q</b>     | <b>2Q</b>     | <b>3Q</b>     | <b>4Q</b>    |
| 31 | <b>Pretax profits</b>          | <b>8,951</b> | <b>10,507</b> | <b>11,580</b> | <b>2,600</b> | <b>18,705</b> | <b>10,143</b> | <b>11,260</b> | <b>7,409</b> |
| 32 | Corporation tax                | 2,416        | 3,285         | 3,395         | 132          | 5,570         | 2,894         | 3,058         | 2,105        |
| 33 | <i>Corporation tax rate</i>    | 27.0%        | 31.3%         | 29.3%         | 5.1%         | 29.8%         | 28.5%         | 27.2%         | 28.4%        |

1 28.4%: total income taxes of 13,627, less 11,522 for nine months, gives 2,105.

Shortcut fixes the cell and asks before it updates the skill. Next quarter, run it from the / menu.

## 6

## Check a figure against its source

The screenshot shows the Shortcut application interface. On the left, a spreadsheet titled 'Kewpie Driver.xlsx' is open, displaying the '4Q FY25 Data Source Sheet'. The spreadsheet has columns for Item, FY Total, 9M (Q1-Q3), 4Q Calc, and Source. A red corner mark is placed on cell C15, which contains the value 13,627. A note box is attached to this cell, containing the text: 'Kewpie\_Summary\_of\_Consolidated\_Financial\_Statements\_for\_the\_Fiscal\_Year\_Ended\_November\_30\_2025.pdf | Page 12 | 13,627'. On the right, the 'Source Preview' panel is open, showing a snippet of a financial statement titled '2. Consolidated Statements of Income and Consolidated Statements of Comprehensive Income'. The table in the preview shows values for the previous and current fiscal years. The value 13,627 is highlighted in the 'Total income taxes' row for the current fiscal year. Below the preview, a chat box shows the command '+ '4Q FY25 Source'!C15' and the response 'Source: C15'. The bottom of the interface shows a navigation bar with 'Dashboard', 'Driver', and '4Q FY25 Source' tabs.

| Item                          | FY Total | 9M (Q1-Q3) | 4Q Calc | Source  |
|-------------------------------|----------|------------|---------|---------|
| Net sales                     | 513,417  | 383,424    | 129,993 | Page 12 |
| Cost of sales                 | 362,490  | 270,937    | 91,553  | Page 12 |
| Gross profit                  | 150,927  | 112,487    | 38,440  | Page 12 |
| SG&A                          | 116,298  | 85,424     | 30,874  | Page 12 |
| Operating income              | 34,628   | 27,062     | 7,566   | Page 12 |
| Net non-operating             | 2,761    | 2,156      | 605     | Page 12 |
| Ordinary income               | 37,389   | 29,218     | 8,171   | Page 12 |
| Net extraordinary             | 10,128   | 10,890     | (762)   | Page 12 |
| Profit before income taxes    | 47,517   | 40,108     | 7,409   | Page 12 |
| Total income taxes            | 13,627   | 11,522     | 2,105   | Page 12 |
| Profit attributable to owners | 30,506   |            |         |         |
| Non-controlling interests     | 3,383    |            |         |         |

|                                                  | Previous fiscal year<br>Dec 1, 2023 to Nov 30, 2024 | Current fiscal year<br>Dec 1, 2024 to Nov 30, 2025 |
|--------------------------------------------------|-----------------------------------------------------|----------------------------------------------------|
| Net sales                                        | 483,985                                             | 513,417                                            |
| Cost of sales                                    | 336,217                                             | 362,490                                            |
| Gross profit                                     | 147,767                                             | 150,927                                            |
| Selling, general and administrative expenses     | 113,437                                             | 116,298                                            |
| Operating income                                 | 34,329                                              | 34,628                                             |
| Total non-operating income                       | 3,502                                               | 4,041                                              |
| Total non-operating expenses                     | 958                                                 | 1,280                                              |
| Ordinary income                                  | 36,874                                              | 37,389                                             |
| Total extraordinary gains                        | 455                                                 | 12,589                                             |
| Total extraordinary losses                       | 3,689                                               | 2,461                                              |
| Profit before income taxes                       | 33,638                                              | 47,517                                             |
| Income taxes                                     | 9,083                                               | 12,730                                             |
| Income taxes - deferred                          | 144                                                 | 897                                                |
| Total income taxes                               | 9,228                                               | 13,627                                             |
| Profit                                           | 24,410                                              | 33,890                                             |
| Profit attributable to non-controlling interests | 2,990                                               | 3,383                                              |
| Profit attributable to owners of parent          | 21,419                                              | 30,506                                             |

1 A red corner marks a note. C15 holds total income taxes, the figure from the correction on page 6.

2 The note names the file, the page and the figure.

3 With the cell selected, **Source: C15** appears in the chat box.

4 **Source Preview** opens the release at page 12, with 13,627 highlighted.

## Make checking a habit

**Review mode** pins comments to cell ranges and sends them to Shortcut together. Shortcut answers each one, with links to the cells.

Spot-check a few numbers yourself. When Shortcut gets one wrong, tell it, and it writes the lesson to memory.



# On your desk

## The four modes

|        |                                                |
|--------|------------------------------------------------|
| Ask    | Questions and reviews. Nothing changes.        |
| Action | Most work.                                     |
| Plan   | Questions first, then a plan to execute.       |
| Manage | Long, extensive builds, split among subagents. |

## Change course

|         |                                                |
|---------|------------------------------------------------|
| Steer   | A new message while it works.                  |
| Stop    | Changes made so far stay.                      |
| Restore | The workbook goes back to before that message. |

## Five habits

- 1 Say how to build it, or Shortcut picks one of the million ways to build a DCF.
- 2 Give Shortcut the scope and context it needs: filings, last quarter’s workbook, a finished example. Without them it has to guess.
- 3 On a big build, ask for a model map first, and check it before Shortcut builds.
- 4 Turn work you repeat into a skill, and correct the skill when it slips.
- 5 Audit before you send, and spot-check a few numbers yourself.

## Requests worth keeping

- Audit this workbook. Explain how it is built and flag anything that looks off, with the cell. Change nothing.
- Explore this workbook and give me a model map: each tab, its drivers and how they link. Change nothing.
- Add a cell note to every figure you pulled, with the file, page and figure.

**The web guide** [shortcut.ai/docs/getting-started](https://shortcut.ai/docs/getting-started) walks through each step on the same workbook.