PALADIN DATA CORPORATION™

BizCoach Webinars

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PALADIN™ DATA CORPORATION

TECHNICAL LEVEL:

EASY | INTERMEDIATE | ADVANCED

Do your homework: Add jobs, projects, or patients to your house account profiles

- Why do I need this feature?
- What are “projects” in Paladin Point of Sale?
- How to set up projects
- How to apply a project to an invoice
- How to view information by project

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Why do I need this feature?

- Allows you to track multiple “jobs” in one customer account
- Gives pharmacists a way to track multiple patients and bill a single doctor’s office
- Lets you filter report results by job
- Lets you calculate totals by job
- Offers you easy access under one customer account

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What are “projects” in Paladin Point of Sale?

- Projects are a way to assign different jobs and tasks to customers with a single house account.
- Projects can also be used by pharmacies that a bill a doctor’s office for multiple patients.

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How to set up projects

1. On the top ribbon, click the **Customers** module or press ALT+2.
2. Search for and display the customer account information.
3. On the bottom ribbon, click **Projects & Auth. Signers** or press F4.
4. In the **Authorized Signers & Projects** window, click select **Projects**.
5. In this window, you can do any of the following:

    - **Create a new project**: In the **Enter New Project**: box, type a project name, and then click **Add**.
    - **Edit a project**: Highlight the project you want to edit, click **Edit**, and then change the project name.
    - **Make a project inactive**: Highlight the project you want to edit, and then click **Remove**. This makes the project inactive, and does not permanently delete the project. You can always restore the project.
    - **Restore an inactive project**: On the bottom of the window, select **Inactive**. Highlight the project you want to restore, click **Restore**, and then select **Active** to view the project in the list of active projects.

6. When you have made all your changes, click **F12 Finish** or press F12.

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How to apply a project to an invoice

Note: Projects are only available for **Credit Card** and **Charge** payment types.

1. In the **Invoice/Quote** module, select a customer with projects add items to the invoice, and then start the checkout process.
2. On the **Checkout** tab, on the bottom ribbon, select one of the following payment options.
3. Click **Charge** or press F2.
4. Click **Credit Card** or press F3, swipe the credit card, and then click **Next. Note**: To add a project using a credit card, the **Enable Auth Signer for Credit Cards on File** option must be set on the **Credit Card** tab in **Paladin Configuration**.
5. In the **Invoice Information** window, do one of the following:

- **Select an existing project:**
  a. In the **Projects** list, highlight a project.
  b. Click **Next.**

- **Add a new project:**
  a. Click **Add Project**.
  b. In the **Add or Restore Projects** window, in the **Enter New Project** box, enter a new project name, and then click **Add**.
  c. In the **Requires manager password** box, enter a manager's password.
  d. Click **Finish**.
  e. In the **Projects** list, select the new project.
  f. Click **Next**.

- **Restore and select an inactive project:**
  a. Click **Add Project**.
  b. In the **Add or Restore Projects** window, select **Inactive**.
  c. Highlight the project you want to restore, and then click **Restore**.
  d. In the **Requires manager password** box, enter a manager's password.
  e. Click **Finish**.
  f. In the **Projects** list, select the new project.
  g. Click **Next**.

6. Complete the checkout process. The project will appear on the receipt and can be used to look up the invoice later in the **Recent Sales History** viewer in the **Customers** module or in the **Transactions Report**.

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How to view information by project

- Recent Sales History
  1. In the **Customers** module, on the **Credit** tab, in the **Sales History** pane, click **Customer Friendly.**
  2. In the **Recent Sales History** viewer, select a project to filter the results.
- Transaction Report
  1. In the **Additional Settings** pane, in the **Keyword Search** list select **ActiveProjects** or **InactiveProjects**.
  2. Select the project to filter the report results.
- **Coming soon! –** Show a breakdown by project on your month-end statements.

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Learn more

To learn more about this topic, see the following resource in our Help Portal:

- About customer projects

A recording of this webinar will be available at portal.paladinpos.com/webinars.

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