

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



In the Mix - New Invoice Importer Feature

Charles Owen



TECHNICAL LEVEL:

EASY

INTERMEDIATE

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IN THE MIX - NEW INVOICE IMPORTER FEATURE

Agenda

- 1.
- 2.
- 3.



- The purpose of the invoice importer feature
- The import|export invoice template
- What imported invoice data looks like
- How to import invoices
- Paladin demonstration



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IN THE MIX - NEW INVOICE IMPORTER FEATURE

The purpose of the invoice importer feature



- Import sales from other systems.
- Combine virtual web-store sales with sales in Paladin Point of Sale.
- Maintain correct inventory counts.
- Consolidate revenue from other sources.



IN THE MIX - NEW INVOICE IMPORTER FEATURE

The import | export invoice template

	A	B	C	D	E	F	G	H
1	TRANSACTION #	DATE	PART #	ALT PART #	DESCRIPTION	QUANTITY	RETAIL PRICE	
2	1	29-Apr-16 2:44:01 PM	ABC		part description	10	9.99	
3	1	29-Apr-16 2:44:01 PM	DEF		part description	5	4.99	
4	2	29-Apr-16 2:44:01 PM	GHI		part description	10	1.99	
5	2	29-Apr-16 2:44:01 PM	JKL		part description	5	3.99	
6								
7								

- Seven (7) invoice values are imported.
- Duplicate invoice numbers are allowed.
- A sample import template is available.



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What imported invoice data looks like

The screenshot shows the Paladim Point of Sale software interface. The top menu bar includes File, Edit, Maintain, Tasks, Reports, and Help. Below the menu is a toolbar with icons for Invoice/Quote, Customers, Inventory, P.O., Reports, Backup, Exit, and Paladim Support. The main window displays the Inventory module with the following details:

Part # 1497478 Desc 1 PLIER GROOVE JOINT 10IN On Order: Defective: On Hold: Stock On Hand
Alt # 076174841107 Desc 2 5 0 0 2

The Recent Sales History table is displayed below:

Date	Time	Employee	Term.	Act #	Sold To	Inv #	Qty Sold	Adj Qty	Sale Price	Profit
01-May-16	18:46	Paladin Support	2	0	IMPORT	1	10	10	8.69	49.16
25-Oct-15	07:15	Tina Owen	3	0	CASH SALE	516	1	1	8.69	4.92
18-Aug-15	13:46	Paladin Support	2	0		494	1	1	8.69	4.92
18-Aug-15	13:44	Paladin Support	2	0		493	1	1	8.69	4.92
04-Aug-15	12:26	Charles Owen	2	1	BROGAN CONTRACTING	482	1	1	7.82	4.05
01-Aug-15	13:42	Paladin Support	2	0	CASH SALE	461	1	1	8.69	4.92
29-Jul-15	09:20	Charles Owen	2	5	JOAN GARRAND	458	1	1	7.82	2.69
29-Jul-15	08:59	Charles Owen	2	0	CASH SALE	455	1	1	8.69	3.56
29-Jul-15	08:57	Charles Owen	2	0	CASH SALE	454	1	1	8.69	3.56

Recent Sales History
Double-click a row for more detailed transaction information.

Report Done

- ❑ In the **Inventory** module, in an item's **Recent Sales History**, the **Sold To** value of an imported transaction is set to **IMPORT**.
- ❑ Double-click the transaction to display an invoice that includes all items with the same invoice import number.



IN THE MIX - NEW INVOICE IMPORTER FEATURE

How to import invoices

1. On the **Maintain** menu, click **Data Viewer**.
2. Click the **Invoice** tab, and then click the **Import** tab.
3. Export the file template.
4. Create the import file.
5. Click the ellipsis (...) to find the file.
6. Click **Read File** to validate the file.
7. Click **Process** to import the file.

The screenshot displays the Paladin POS Data Viewer application. The main window shows the 'Import' tab selected, with the 'Read File' button circled in green and labeled '6'. The 'Process' button is circled in green and labeled '7'. The 'Export' button is circled in green and labeled '3'. The 'Invoice' tab is also circled in green and labeled '2'. A secondary screenshot shows the 'Maintain' menu with 'Data Viewer' selected, circled in green and labeled '1'. An Excel spreadsheet is shown with the following data:

TRANSACTION #	DATE	PART #	ALT PART #	DESCRIPTION	QUANTITY	RETAIL PRICE
1	29-Apr-16 2:44:01 PM	ABC		part description	10	9.99
3	29-Apr-16 2:44:01 PM	DEF		part description	5	4.99
4	29-Apr-16 2:44:01 PM	GHI		part description	10	1.99
5	29-Apr-16 2:44:01 PM	JKL		part description	5	3.99



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Learn more

To learn more about the invoice importer feature, you can find these articles and more in our [Knowledge Base](#):

- How to create an invoice transaction file that you can import
- How to import an invoice transaction file into Paladin Point of Sale

You can also view this release note:

- [New Invoice Importer](#)

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

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