

PALADIN DATA CORPORATION™

# Biz Coach Webinars

FREE ADVANCED TRAINING



## Invoicing brings it all together

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TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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## What we'll cover

- Using keyboard shortcuts
- Displaying a quantity discount message
- Opening the cash drawer
- Printing a quote
- Setting a core charge
- Preventing consolidation of invoice line items
- Using Profit Analyst
- Understanding line item Tax, Def, & Net options
- Hiding the regular retail price on a receipt





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## Using keyboard shortcuts



- In Paladin Point of Sale, press Alt + 1 to open the **Invoice/Quote** module.

In the **Invoice/Quote** module, you can use the following keyboard shortcuts:

- PgUp and PgDn cycle through the tabs.
- F1-F8 activates the buttons on the bottom ribbon.
- Alt + A opens **Profit Analyst**.
- Ctrl + K opens the **Footage Calculator** when the cursor is in the **Quantity** box.
- Alt + R puts the cursor in the **Rewards** box.
- Alt + C puts the cursor in the **Customer** box.
- Alt + P puts the cursor in the **Phone** box.



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## Displaying a quantity discount message

**Invoice (Store) tab**

Enable Kit Functionality  
Kit Class Number

Enable Hiding Kit Components

Enable Inventory On Hold

**Display Invoicing Pop-Up Message for Items with Quantity Discounts**

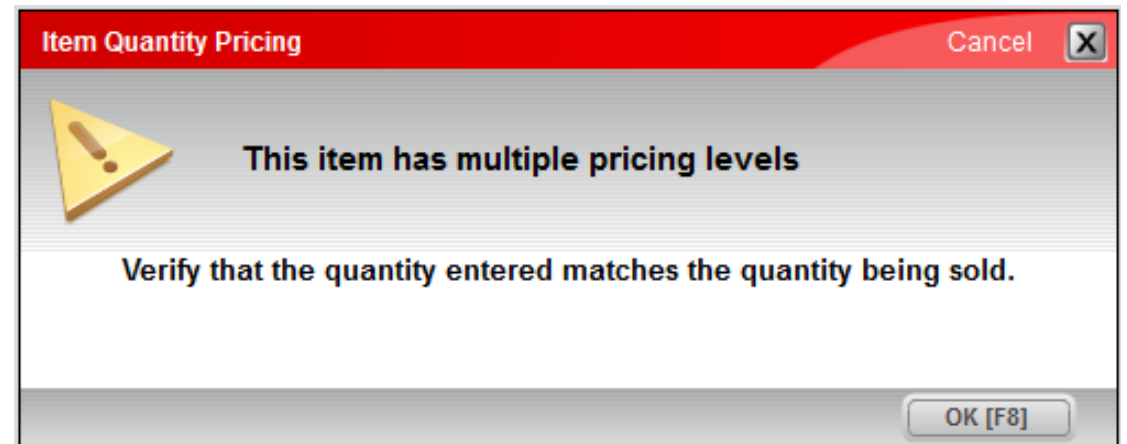
Open Cash Drawer For Selected Payment Types

<input checked="" type="checkbox"/>	Cash	▲
<input type="checkbox"/>	Charge	▬
<input type="checkbox"/>	Credit Card	▬
<input checked="" type="checkbox"/>	Check	▼

Don't Open Cash Drawer for Zero Dollar Cash Sales

How to setup Paladin Point of Sale to show a message when an item has a quantity discount, so you can verify the purchase amounts

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **Display Invoicing Pop-Up Message for items with quantity discounts**.
4. Click **Save**, and then click **Close**.





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## Opening the cash drawer

**Invoice (Store) tab**

Require Signature for Payments

Enable Kit Functionality  
Kit Class Number

Enable Hiding Kit Components

Enable Inventory On Hold

Display Invoicing Pop-Up Message for Items with Quantity Discounts

**Open Cash Drawer For Selected Payment Types**

Cash

Charge

Credit Card

Check

Don't Open Cash Drawer for Zero Dollar Cash Sales

### How to specify the payment types that open the cash drawer

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In **Invoice** pane, in the **Open Cash Drawer For Selected Payment Types** box, select the payment types, such as:
  - **Cash**
  - **Check**
  - **Charge**
  - **Coupon**
  - **Credit card**
  - **Change**
  - **And more**
4. Click **Save**, and then click **Close**.

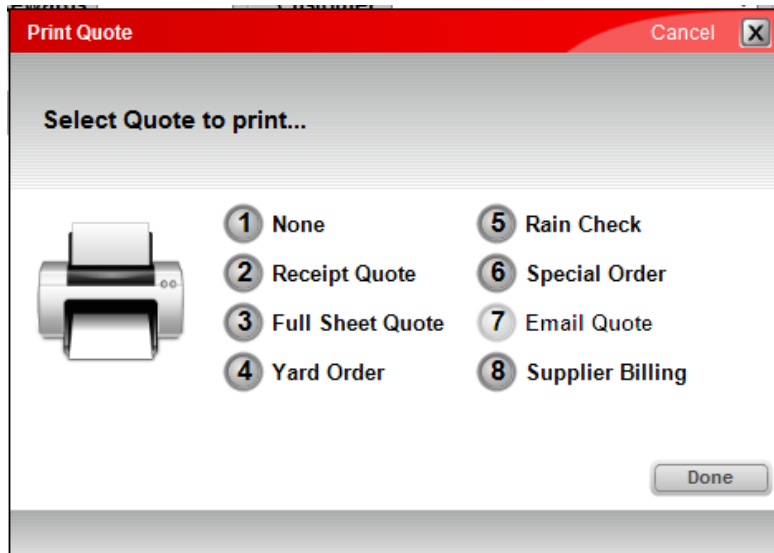
### How to open the cash drawer when there is no sale

1. In the **Invoice/Quote** module, on the bottom ribbon, click **Checkout** or press F8.
2. Press F9.
3. In the **Manager Approval** window, enter a four-digit manager password, and then click **OK**.



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## Printing a quote



### How to print a quote

1. On the top ribbon, click the **Invoice/Quote** module.
2. Create the quote.
3. On the bottom ribbon, click **Checkout** or press F8.
4. On the bottom ribbon, click **Print Quote** or press F7.
5. In the **Print Quote** window, select the type of quote you want to print, and then click **Done**.

The quote is **NOT** saved in Paladin Point of Sale.



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## Setting a core charge

**Invoice (Store) tab**

Add Alternate Part Numbers from Invoicing

Use Alternate Core Charge Identifier

Core Charge Identifier:

Disable Auto-Combining of Rows

Display Only Quotes that Match Account #

Filter Yard Order Printing by Inventory Location

Location:

Use Rec

Hide Item

**Deposit:**

**Mfg Number:**

**Effective Code:**

**Inventory module**

### How to add a core charge to an inventory item

1. In the **Inventory** module, open the inventory item.
2. Click the **General** tab.
3. In the Item **Information** pane, enter the core charge value.  
**Note:** The core charge name can be customized.
4. Click **Save** or press F12.

### How to customize the core charge name

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **User Alternate Core Charge Identifier**.
4. In the **Core Charge Identifier** text box, enter a name.
5. Click **Save**, and then click **Close**.



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## Preventing consolidation of invoice line items

**Invoice (Store) tab**

Enable Automatic Receipt at Checkout

Add Alternate Part Numbers from Invoicing

Use Alternate Core Charge Identifier

Core Charge Identifier:

**Disable Auto-Combining of Rows**

Display Only Quotes that Match Account #

Filter Yard Order Printing by Inventory Location

Location:  to

Use Receipt Printer for Invoice Reprint

Hide Item Regular Retail On Invoice

**How to stop different invoice entries for the same inventory item from combining automatically**

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **Disable Auto-Combining of Rows**.
4. Click **Save**, and then click **Close**.





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## Using Profit Analyst

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 Profit Analyst 5 6 7

Invoice / Quote Checkout

Rewards 1234567890 Customer 1 - B

Credit 7,000.00 Address 1 2230

Tax	Def	Net	Part Number	Descri
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10111	2IN FOAM PAINTBRUSH
14	0	0	5297973	2.49, 8.59/5, 15.33/10, 37.00/25
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0026104	89-871 PLIER BENT LN 6.4IN
0	0	0	0026104	15.99

Profit Analyst

Item	Cost	Profit	Margin
Current Line	\$0.419	\$1.82	81.3 %
Invoice	\$8.446	\$8.18	49.2 %

Customer Accounting Access

Save ACH Data

Profit Analyst

Reset Save

Employees tab

To see the cost, profit, and margin for an item, and for the entire invoice, use **Profit Analyst** in the **Invoice/Quote** module.

### How to open the Profit Analyst window

1. Highlight an item on an invoice or quote.
2. Then do one of the following:
  - Press and hold **Alt** and then press **A**.
  - or-
  - On the **Edit** menu, click **Profit Analyst**.

### How to give an employee access to Profit Analyst

1. On the **File** menu, click **Setup**.
2. On the **Employees** tab, highlight the employee that needs access.
3. In the **Access Level** pane, select **Profit Analyst**, and then click **Save**.



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## Understanding line item Tax, Def and Net options



- **Tax:** When selected, the item will be taxed at the default tax rate. Otherwise, no tax is applied.
- **Def:** When selected, the item is marked as defective. If this happens during a return, the defective stock on hand (SOH) will increase. If this happens during a purchase, the defective SOH will decrease.
- **Net:** When selected, this item is excluded from discounts.



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## Hiding the regular retail price on a receipt

**Invoice (Store) tab**

Print Receipt at Checkout

Add Alternate Part Numbers from Invoicing

Use Alternate Core Charge Identifier

Core Charge Identifier:

Disable Auto-Combining of Rows

Display Only Quotes that Match Account #

Filter Yard Order Printing by Inventory Location

Location:  to

Use Receipt Printer for Invoice Reprint

Hide Item Regular Retail On Invoice

**How to hide the regular retail price on a receipt, and only display the actual sale price**

1. On the **File** menu, click **Setup**.
2. Click the **Invoice (Store)** tab.
3. In the **Invoice** pane, select **Hide Item Regular Retail On Invoice**.
4. Click **Save**, and then click **Close**.



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# **BizCoach** Webinars



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Learn more

To learn more, see the following resources in our [Help Portal](#):

- [About quantity price discounts](#)
- [About cash drawers](#)
- [About quotes](#)
- [New Profit Analyst for invoices and quotes](#)
- [About the Tax, Def, and Net check boxes for each line item on an invoice](#)

A recording of this webinar will be available at [portal.paladinpos.com/webinars](http://portal.paladinpos.com/webinars).

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