

PALADIN DATA CORPORATION™

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FREE ADVANCED TRAINING



Building profits with lumber-specific features

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TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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Building profits with lumber-specific features



- Paladin's lumber features of the distant past
- Paladin's lumber features from the last two years
- Paladin's newest lumber features
- Profit Analyst
- Special order enhancements
- Footage (tally) calculator enhancements
- Yard order print formats
- Min margin enhancements
- MBF cost wizards
- Project and job tracking



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Paladin's lumber features of the distant past

- ☐ Stored quotes, on-hold tickets, and special orders
- ☐ Kits & construction bundles
- ☐ Custom contractor pricing, and discounts
- ☐ Yard order tickets
- ☐ Footage (tally) calculator
- ☐ Margin protection on sales, discounts, promotions, and prompt payment discounts
- ☐ Open item accounting



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Paladin's lumber features from the last two years



- ☐ Authorized account signers
- ☐ Profit Analyst: Lets you view cost, margin, and profit—per item and for the total invoice—during invoicing*
- ☐ Special order enhancements: Freight, deposits, and printing large form (8.5inx11in)*
- ☐ Footage calculator enhancements: Editable and PO*
- ☐ Thousand board foot (MBF) cost wizard*
- ☐ Yard order printer support increased to four formats*
- ☐ Kit prices automatically update to match retail prices
- ☐ Mobile2Deliver - In-the-field processing of deliveries



*We'll cover these features later in this webinar



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Paladin's newest lumber features

- ☐ Yard order print tray selection*
- ☐ Minimum margin option with F4 Discount*
- ☐ Dump SKU discounts*
- ☐ Job or project tracking and reporting*



- ☐ Subtotals by project on email statements

*We'll cover these features later in this webinar



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Profit Analyst

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

To open the **Profit Analyst** window:

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

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 the **Profit Analyst** check box, and then click **Save**.

The screenshot shows the 'Paladin Point of Sale' application. The 'Invoice / Quote' module is active. A 'Profit Analyst' window is open, displaying a table with the following data:

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

In the background, the main interface shows an invoice for '2IN FOAM PAINTBRUSH' (Part Number 10111) with a price of 2.49. A 'Customer Accounting Access' dialog box is also visible, with the 'Profit Analyst' checkbox checked.



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Special order enhancements

- Force special orders to a large sheet.
- Set a percent deposit amount.
- Add a freight cost to the special order.

Core Charge Department

Use core charge department ☒
Use inventory item department ☐

Special Orders

☒ Enable Special Orders
☐ Use Existing Inventory Departments for Special Order Items
☐ Disable Special Order Notes to Purchase Orders
☒ Allow Special Orders to Create Customers
☐ Force Special Orders to big form?

Special Order Default Deposit

☐ None
☒ 25%
☐ 50%
☐ 100%
☐ Other

Signature Required

Enable Signature Required ☐
Signature Required Class Number

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 P.O. 5 Reports 6 Backup

Invoice / Quote Checkout

Rewards 12346 Customer 2 - JAMES ALEX

Special Order Deposit

Special Order Total \$983.25

☐ None \$0.00
☒ 25% \$245.81
☐ 50% \$491.63
☐ 100% \$983.25
☐ Other \$0.00

F12 Checkout



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Footage (tally) calculator enhancements



- Saved values can be edited.
- To open the footage calculator, after you highlight an item on an invoice or quote, do one of the following:
 - On the **Edit** menu, click **Footage Calculator**
 - Press Ctrl+K
- The footage calculator works with purchase orders as well.

Pieces	Feet	Inches
1	10	0
2	12	0
1	0	96
0	0	0



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MBF cost wizards

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 P.O. 5 Reports 6 Backup 7 Exit 9 Paladin Support 07-Oct-16

Purchase Order Confirm P. O. Cancel

Days 15 Supplier Address 2 Phone Address 1 City/State/Zip Fax

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
LUM2 1	2X4X8 TREATED	EACH 204.94	125	\$ 349.050	\$ 232.70
LUM2	Need: 0, OrdQty: 187.95, Min: 0.00, Max: 188.00, Ord%: 100%	0		\$1.862	
		SOH			
		ORD			

1 1

Board Feet: 5.333

Cancel OK

- Wizards calculate costs in:
 - Thousand board feet (MBF)
 - Thousand square feet (MSF)
 - Tons
 - Order multiples
- You can receive a PO in MBF, MSF, or tons.



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Yard order print formats

The screenshot shows the 'Paladin Configuration' window with various tabs at the top. The 'Default Invoice Form (Local Terminal)' section has 'Receipt Printer' selected. The 'Default Yard Order Form (Local Terminal)' section has 'Receipt Printer' and 'Laser Printer' both unselected. Below this, there are options for 'Laser Printer Half Sheet Type 1', 'Laser Printer Half Sheet Type 2', and 'Laser Printer Full Sheet', with 'Laser Printer Full Sheet' selected. A 'Sig Pad Size' dropdown is set to 'Small'. A checkbox for 'New Invoices Require Cash Drawer Closed' is unchecked. A pop-up window is open over the 'Dedicated Yard Order Printer' section, showing a list of printers with 'Lexmark Universal v2 XL' selected. The 'Dedicated Yard Order Printer Tray' dropdown is also open, showing a list of trays with 'Tray 2' selected. Other printers listed include 'Label Printer 1' through 'Label Printer 4' and 'RF Attached Printer 1'.

- Set the default yard order/ticket print format.
 - Receipt printer
 - Laser half sheet type 1
 - Laser half sheet type 2
 - Laser full sheet
- Set the yard order printer tray.
 - Tray 1, 2 , etc.





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Minimum margin enhancements

- Set the minimum margin by department.
- Export a department list to Excel and print it.
- Enforce the minimum margin with F4 Discounts.

Paladin Configuration

Min Margin Pharmacy Pricing Plan Receivables Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M
Invoice (Local) Network Secure Accounting ACH Class Credit Card Company Data Archive Delivery Dept Employees Forms Invoice (Store) Loc

Departments

☒ Active ☐ Deleted

ID Name

40	PLUMBING SUP...
46	HEATING AND C...
50	HARDWARE
56	FASTENERS
58	BUILDING MATE...
60	APPLIANCES AN...
64	HOUSEWARES ...
69	LUMBER
70	LAWN/GARDE

New Remove

Export

Name BUILDING MATE Department label number 58

#	Store Name	Dept non-taxable	State non-taxable	County non-taxable	City non-taxable	PO system number-of-days %	Suggested min factor %	Minimum Margin % *
1	Hometown ACE ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	45	20

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

☐ Disable 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

☒ Invoice F4/Discount Respects Min Margin

☒ Invoice F4/Discount Applies to Manually Priced Items

☐ Capture Return Item Invoice Number

Deleted Part Behavior

Save



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Project and job tracking

The screenshot displays the 'Paladin POS Data Viewer' application. At the top, there are tabs for 'Customers', 'Credit', and 'Balances'. Below these, a 'Status' field is set to 'Active', and a 'Customer' dropdown menu shows '2 - CUSTOMER - 2'. A 'Rewards' field contains '1981440217' and an 'Address 1' field contains 'address 1'. A red banner at the bottom of this section reads 'Authorized Signers & Projects' with a 'Cancel' button.

Below this is a menu bar with options like 'Log', 'Margin Master', 'Mobile Utils', 'PricingPlan Merge', 'Purchase Orders', 'Rewards', 'Sales EDI', 'Sales Hist', 'Settings', 'ACH Processing', 'ACH Review', 'Customer A/R', 'Customers', 'Customer Merge', 'Discounts', 'GL Summary', 'IME', 'Instant Savings', 'Inventory', 'Invoices', and 'Invoice Import'. The 'Invoices' menu is selected, and a sub-menu is open showing 'View' and 'Import' options.

The main area shows a table of invoices with columns: Id, Number, DateTime, Act_Number, Act_Name, PO_Number, Project, and Total. The 'Project' column has a dropdown menu open, showing options like 'NEW PORCH', 'None', 'MILLER'S DECK', 'JOHNSON FENCE', 'FRANKS REMODE', and 'BERT'S RETAINING'. The 'NEW PORCH' option is selected.

Below the table, there is a section for 'Invoice Items' with a list of items: 'MILLER'S DECK' and 'NEW PORCH'. At the bottom, there are radio buttons for 'Active' (selected) and 'Inactive', and a button labeled 'F12 Finish'.

Id	Number	DateTime	Act_Number	Act_Name	PO_Number	Project	Total
729883	729883	05-Oct-16 07:41	2	CUSTOMER - 2		NEW PORCH	0.89
729882	729882	23-Sep-16 15:50	1	CUSTOMER - 1		None	174.35
729881	729881	23-Sep-16 10:10	2	CUSTOMER - 2 ...	Manager overide...	MILLER'S DECK	1.7
729880	729880	23-Sep-16 09:55		CASH SALE		JOHNSON FENCE	138.19
729879	729879	23-Sep-16 09:53		CASH SALE		FRANKS REMODE	277.37
729878	729878	22-Sep-16 13:29	1	CUSTOMER - 1		BERT'S RETAINING	199.96

- Add projects to customer accounts.
- Assign or add projects during checkout when they are not on the list.
- Require project selection at checkout. Select **(None)** if a project does not apply.
- In Customer module, look up and filter account invoices by project.
- Filter invoices by project in the Transaction Report.
- Edit customer projects on invoices after the fact.



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Learn more

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

- [Profit Analyst for invoices and quotes](#)
- [Special order printing and deposit enhancements](#)
- [Purchase order freight cost added to special orders](#)
- [Saved footage calculator values are editable](#)
- [Two new ways to open the Footage Calculator](#)
- [Footage Calculator available for purchase orders](#)
- [Min margin set by department](#)
- [Export department list into Excel](#)
- [View item costs in MBF and other units](#)
- [Editable invoice PO numbers and projects](#)
- [Organize your customer's purchases by project](#)
- [About customer projects](#)
- [About Mobile2Deliver](#)
- [Webinar: Do your homework: Add jobs, projects, or patients to house account profiles](#)
- [Webinar: New Paladin feature: Mobile2Deliver](#)

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

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