PALADIN DATA CORPORATIONTM

Biz Coach Webinars

FREE ADVANCED TRAINING



Building profits with lumber-specific features

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TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED







- 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



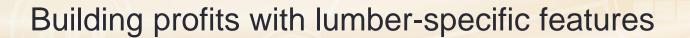


Paladin's lumber features of the distant past

- ☐ 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











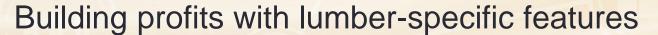
- ☐ Profit Analyst: Lets you view cost, margin, and profit—per item and for the total invoice—during invoicing*
- ☐ Special order enhancements: Freight, deposits, and printing large form (8.5inx11in)*
- ☐ Footage calculator enhancements: Editable and PO*
- ☐ Thousand board foot (MBF) cost wizard*
- ☐ 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









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*



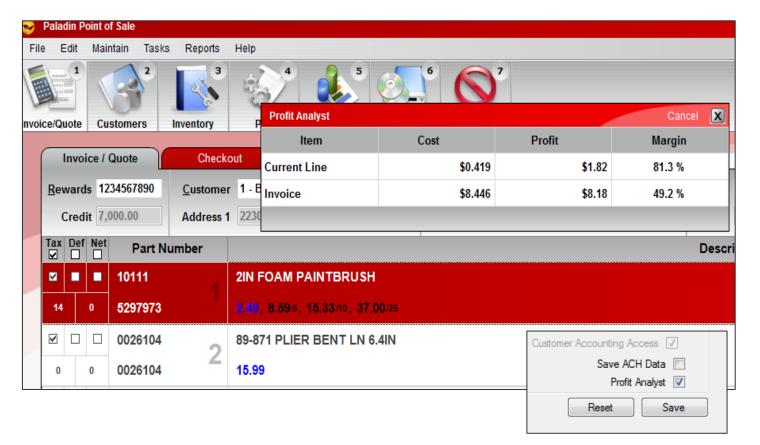
☐ Subtotals by project on email statements

*We'll cover these features later in this webinar





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:

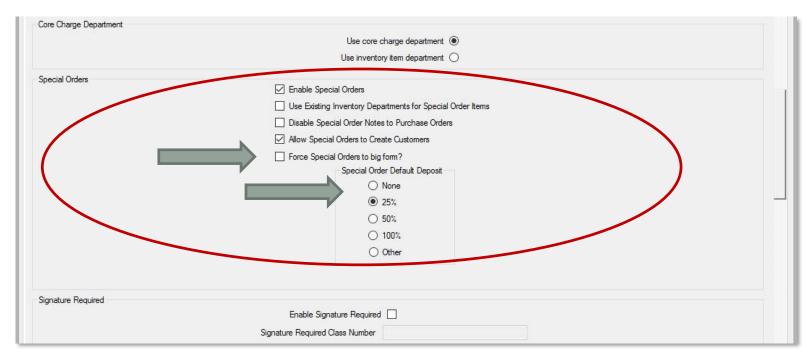
- 1. On the **File** menu, click **Setup**.
- 2. On the **Employees** tab, highlight the employee that needs access.
- 3. In the Access Level pane, select the Profit Analyst check box, and then click Save.

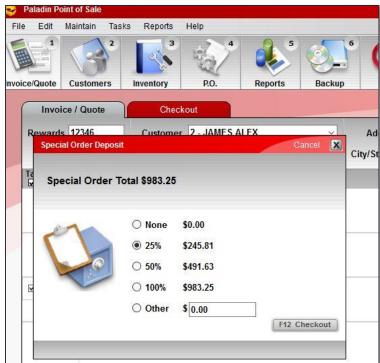




Special order enhancements

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









Footage (tally) calculator enhancements



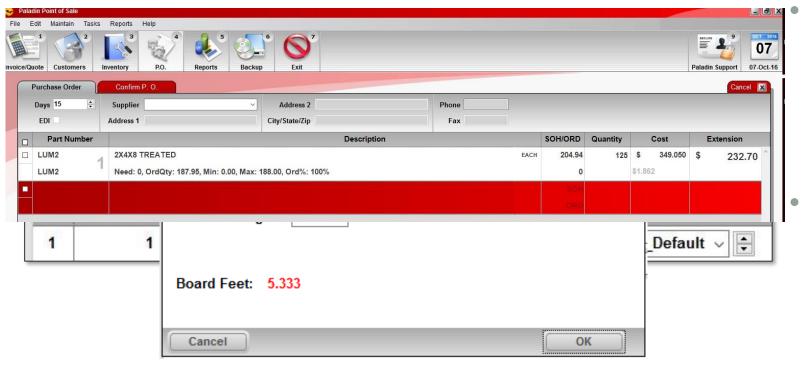
		Cancel
Pieces	Feet	Inches
1	10	0
2	12	0
1	0	96
0	0	0

- 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.





MBF cost wizards

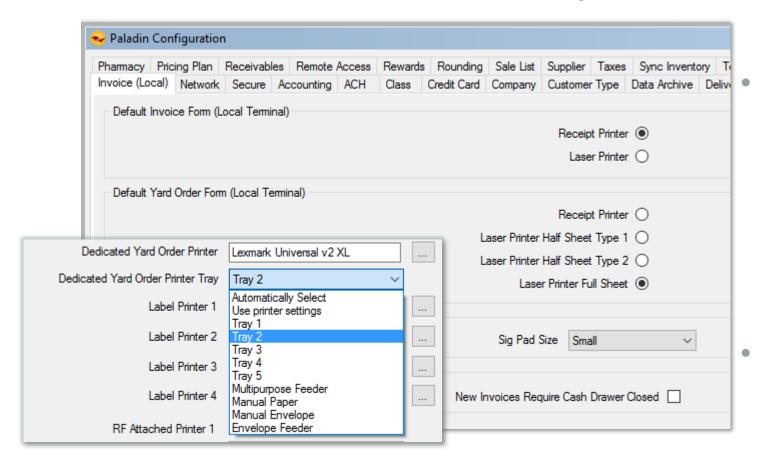


Wizards calculate costs in:

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



Yard order print formats



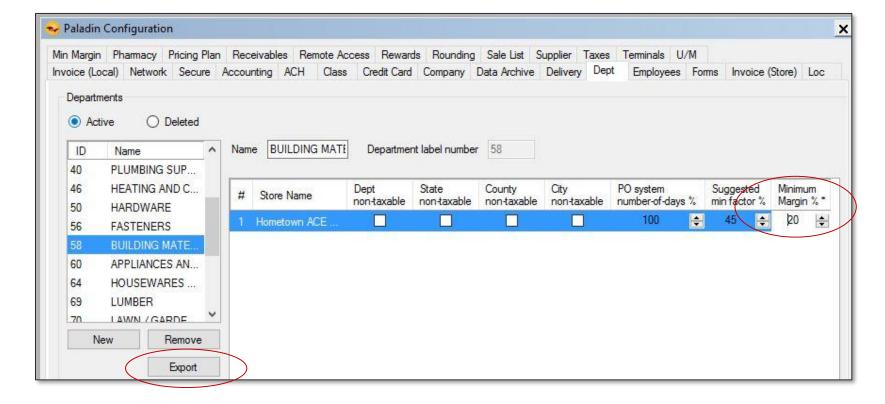
- Set the default yard order/ticket print format.
 - Receipt printer
 - Laser half sheet type 1
 - Laser half sheet type 2
 - Laser full sheet
- Set the yard order printer tray.
 - Tray 1, 2, etc.





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.

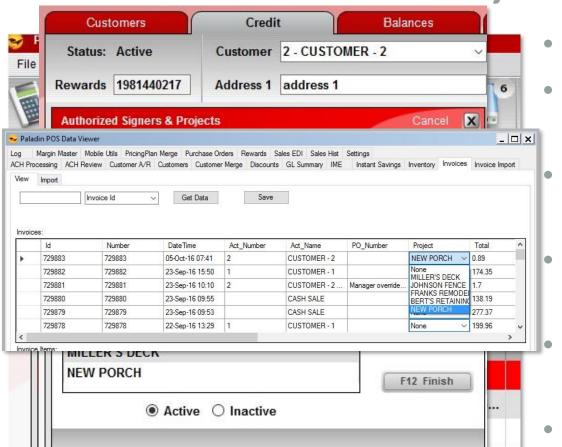


Don't Open Cash Dr	awer for Zero Dollar Cash Sales			
Disable Automatic R	eceipt at Checkout			
Add Alternate Part N	lumbers from Invoicing			
Use Alternate Core C	Charge Identifier			
Core Charge Ider	ntifier:			
Disable Auto-Combin	ning of Rows			
Display Only Quotes	that Match Account #			
Filter Yard Order Printing by Inventory Location				
Location: 9908	82 to 99082			
Use Receipt Printer for Invoice Reprint				
Hide Item Regular Re	etail On Invoice			
☑ Invoice F4/Discount Respects Min Margin				
✓ Invoice F4/Discount Applies to Manually Priced Items				
Capture Return Item Invoice Number				
Deleted Part Behavior	Auto Restore	~		
		Save		
		Jave		





Project and job tracking



- 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.

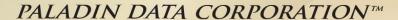




To learn more about this topic, see the following resources in our **Help Portal**:

- 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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