PALADIN DATA CORPORATION™

BizCoach Webinars

FREE ADVANCED TRAINING

Special Orders Made Even Easier!

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PALADIN™ DATA CORPORATION

TECHNICAL LEVEL:

EASY | INTERMEDIATE | ADVANCED

What we will cover

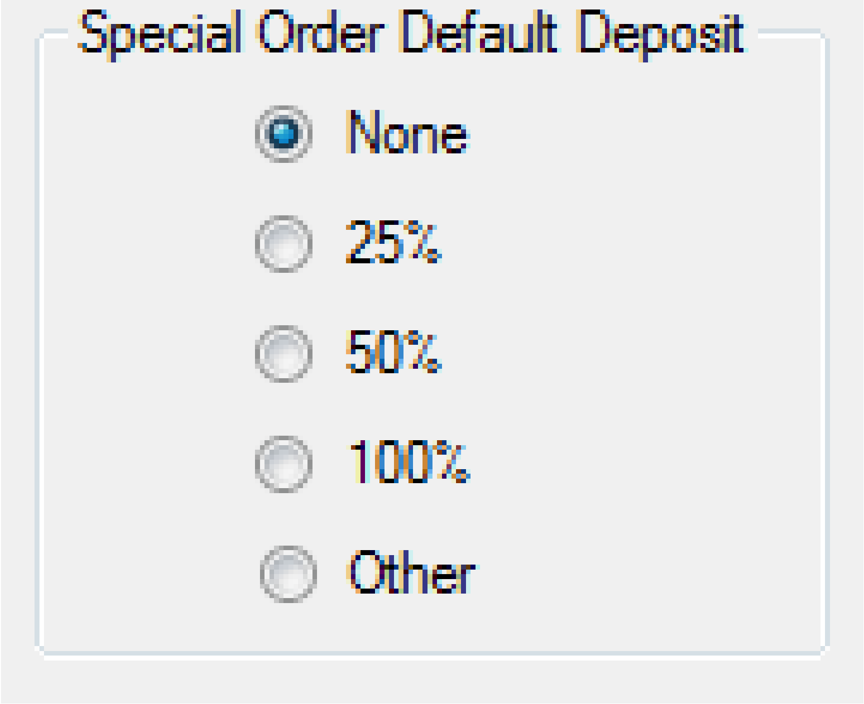
- Two special order (SO) types
- How to set up auto-deposit for special orders (new feature)
- How to take a deposit on a special order (new feature)
- How to take a deposit or give credit for a non-SO
- How to view customers that have a credit balance

Two special order types

1. A new custom item that you never sold before and that doesn't exist in your inventory. (Examples: Custom window, custom door, etc.)

2. An item in your active inventory or from a supplier's all-item catalog that you may not keep on-hand or may not have enough on-hand to meet a customer's needs.

Specifying a default special order deposit



1. On the **File** menu, click **Setup.**
2. Click the **Company** tab, and then scroll to the **Special Order** pane.
3. Select a **Special Order Default Deposit** amount.
4. Click **Save**, and then click **Close.**

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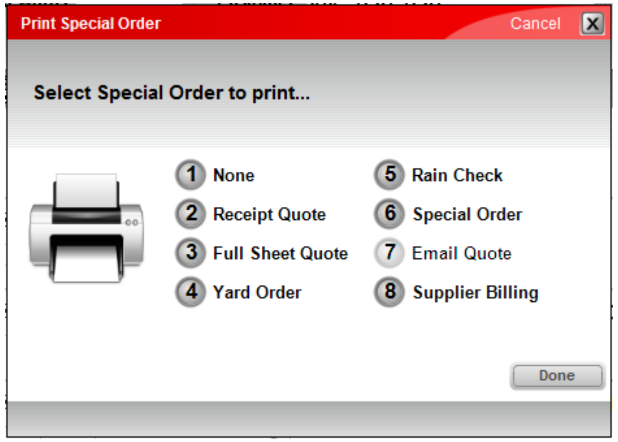
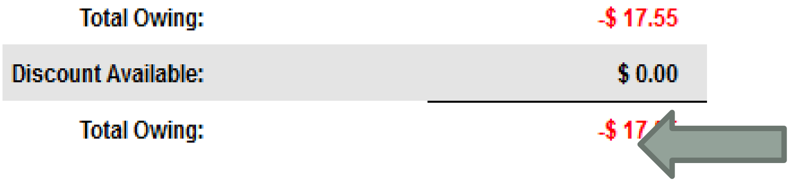
Automatic deposit for SO



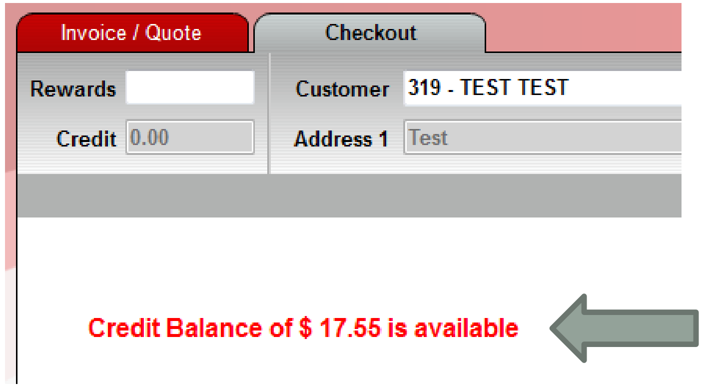
1. Follow the normal SO process.
2. In the **Print Special Order** window, click a format to print the SO, and then click **Done**.
3. In the **Special Order Deposit** window, select a deposit % or enter a dollar amount, and then click **Checkout** or press F12.
4. On the bottom ribbon, click any payment type, and then complete the transaction.

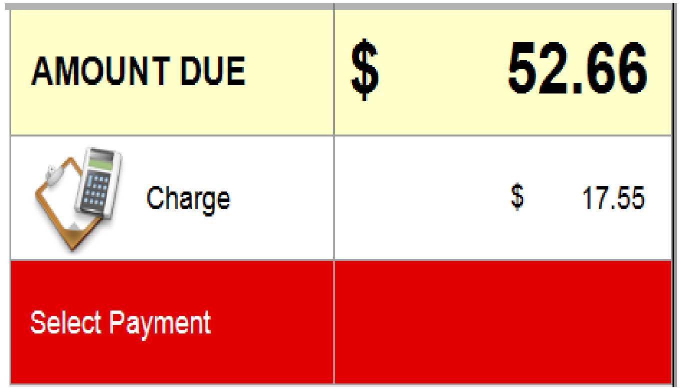
How to view the customer's credit balance.

1. On the top ribbon, click the **Customer** module.
2. Click the **Balances** tab.
3. In the **Totals** pane, look at the **Total Owing** value.



Completing the SO transaction





1. In the **Invoice/Quote** module, click **Recall Transaction** or press F6 to recall the special order.
2. On the bottom ribbon, click **Checkout** or press F8.

   The customer's credit balance is displayed in red.
3. On the bottom ribbon, click **Charge** or press F2 to apply the customer's total credit balance.
4. On the bottom ribbon, click any payment type to pay for the rest of the invoice, and complete the transaction.

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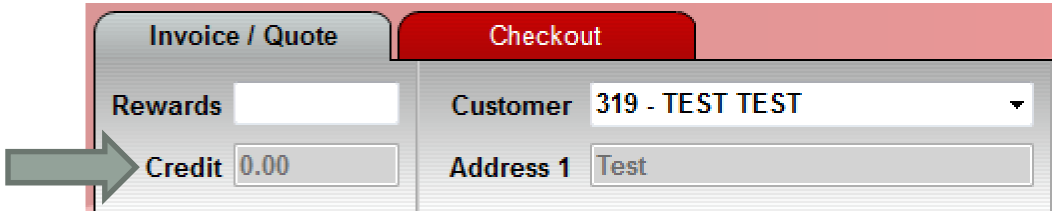
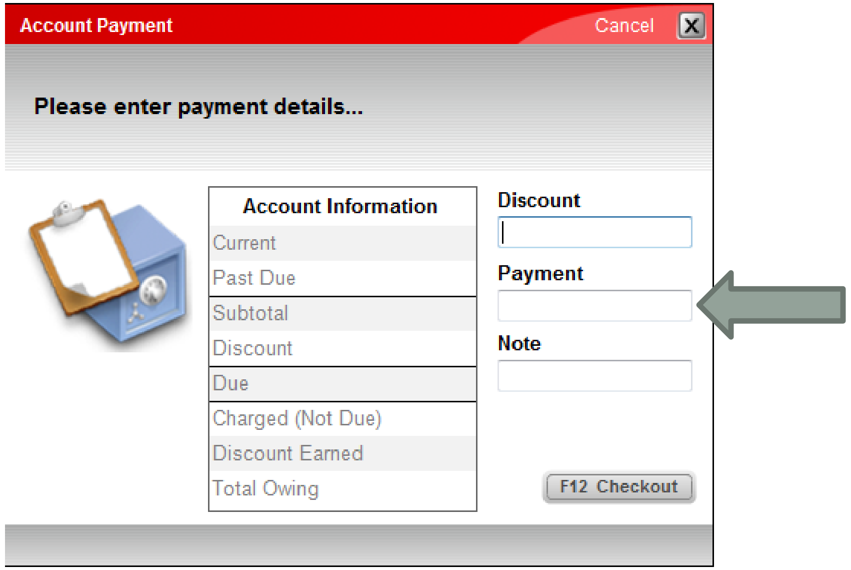
Taking non-SO deposits





1. In the **Invoice/Quote** module, select a customer.
2. On the bottom ribbon, click **Account Payment** or press F5 to accept a payment or deposit. **Note: Account Payment** (F5) is available for customers without a charge account.

3. Enter the desired deposit amount in the **Payment** box, and then click **Checkout** or press F12.

4. On the bottom ribbon, click any payment type, and complete the transaction.

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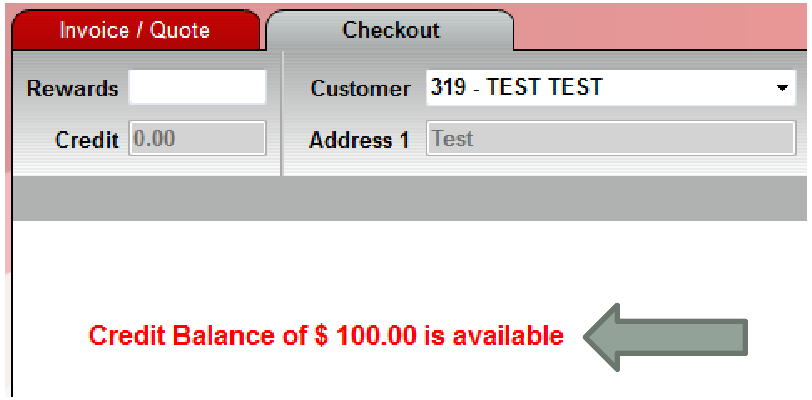
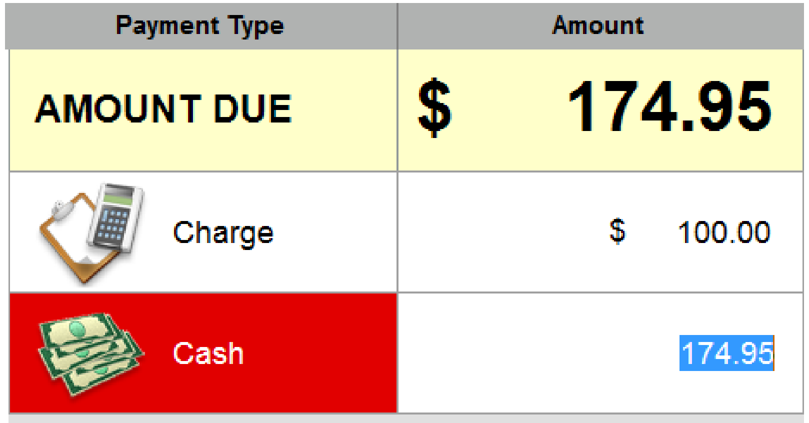
Applying customer deposit to transaction

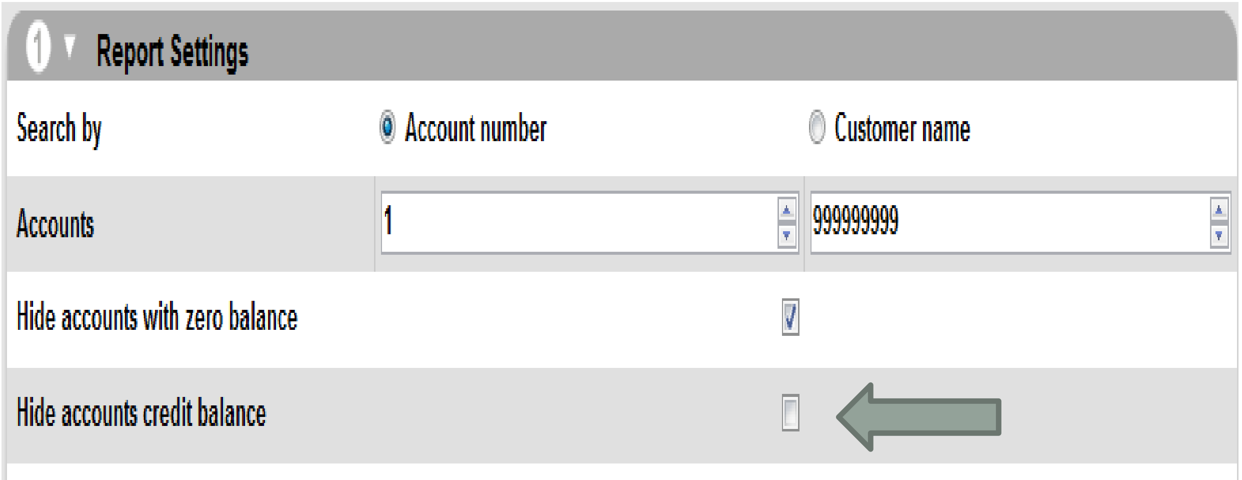




1. In **Invoice/Quote** module, select a customer
2. Create an invoice.
3. On the bottom ribbon, click **Checkout** or press F8.

   Note: The customer's credit balance in displayed in red.
4. On the bottom ribbon, click **Charge** or press F2 to apply the customer's total credit balance.
5. On the bottom ribbon, click any payment type to pay for the rest of the invoice, and complete the transaction.

How to view customers that have store credit/deposits



1. On the top ribbon, click the **Reports** module.
2. In the **Reports** tab, in the **Report Area** pane, click **Accounts Receivable**, and then click **Accounting Reports.**
3. In the **Report List** pane, click **Accounting Summary Report.**
4. In the **Choose Report** pane, click **Next** or press F12
   F12 Next
5. In the **Report Details** pane, if **Hide accounts credit balance** is selected, click the checkbox to clear it.
6. Click **Run Report** or press F12. F12 Run Report
7. Accounts that have credit are listed in order with the largest credit balance on top.
   Note: Because all charge account balances are displayed, you will have to scroll down to see the accounts with a credit balance.

End

Note: For more detailed information, see the following Knowledge Base article: “About special orders”

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