

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



Strange Encounters of the Checkout Kind

Chad Klein



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



Strange Encounters of the Checkout Kind

Agenda

- 1.
- 2.
- 3.

- Cash paid in process
- Cash paid out process
- Cash drop process
- Open the cash drawer from the keyboard
- Cash a check
- Print a quote that is not saved
- Add a note
- Search for a note
- About line-item Tax, Def, and Net options on invoices at checkout



Strange Encounters of the Checkout Kind

Cash paid in



1. In the **Invoice/Quote** module, click **Checkout** (F8).
2. On the bottom ribbon, click **Cash** (F1).
3. On the **Cash** line, in the **Amount** box, enter the amount of cash that you will add to the register, and then press **Enter**.
4. In the **Paid Out Details** window, in the **Description** box, enter notes about the transaction, and then click **Paid In**.
5. In the **Transaction Complete** window, you can print another copy of the invoice.



Strange Encounters of the Checkout Kind

Cash paid out



1. In the **Invoice/Quote** module, click **Checkout (F8)**.
2. On the bottom ribbon, click **Cash (F1)**.
3. On the **Cash** line, in the **Amount** box, enter the amount of cash that you will remove from the register, and then press Enter.
4. In the **Paid Out Details** window, in the **Description** box, enter notes about the transaction, and then click **Paid Out**.
5. In the **Transaction Complete** window, you can print another copy of the invoice.



Strange Encounters of the Checkout Kind

Cash drop



1. In the **Invoice/Quote** module, on the bottom ribbon, click **Checkout** (F8).
2. On the bottom ribbon, click **Cash** (F1) and then press Enter.
3. On the **Cash** line, in the **Amount** box, enter the amount of cash that you are removing and press Enter.
4. In the **Paid Out Details** window, in the **Description** box, enter notes about the drop, and then click **Cash Drop**.
5. In the **Manager Approval** window, enter the manager's 4-digit password, and then click **OK**.



Strange Encounters of the Checkout Kind

Cash a check



1. On the top ribbon, click the **Invoice/Quote** module.
2. On the bottom ribbon, click **Checkout** (F8).
3. On the bottom ribbon, click **Check** (F4).
4. Enter the check amount, and then press Enter.
5. In the **Check Processing** window, enter the check information.
6. Click **Next** to complete the transaction and print a receipt.



Strange Encounters of the Checkout Kind

Open the cash drawer from the keyboard

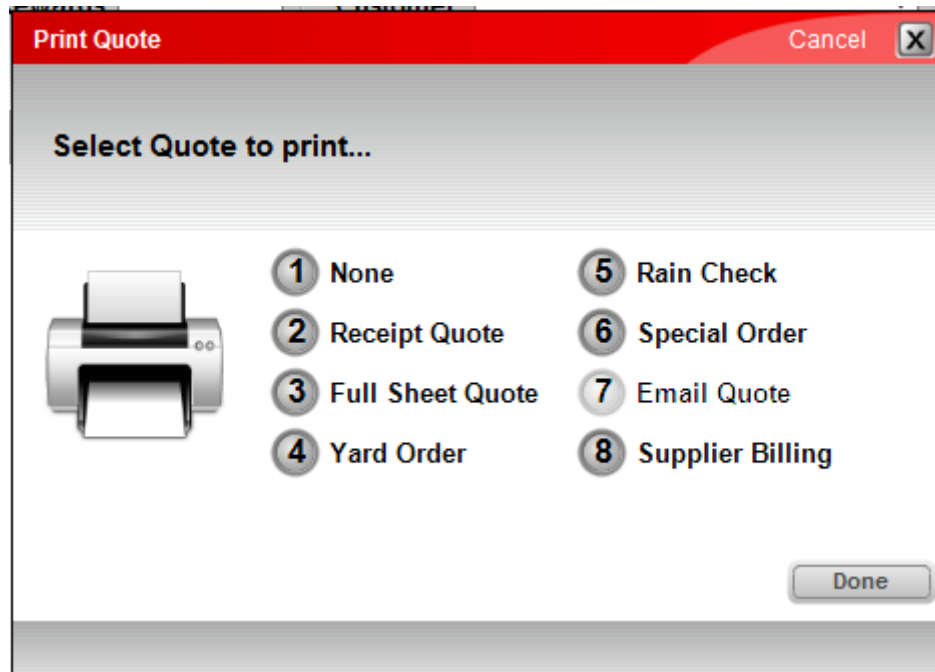


1. On the top ribbon, click the **Invoice/Quote** module.
2. On the bottom ribbon, click **Checkout**.
3. On the keyboard, press the “secret” F9 key.
4. In the **Manager Approval** window, enter the manager’s four-digit password, and then click **OK**.



Strange Encounters of the Checkout Kind

Print a quote that is not saved



1. On the top ribbon, click the **Invoice/Quote** module.
2. Create the quote.
3. On the bottom ribbon, click **Checkout** (F8).
4. On the bottom ribbon, click **Print Quote** (F7).
5. In the **Print Quote** window, select the type of quote you want to print, and then click **Done**.
Note: The quote is not saved in Paladin Point of Sale.



Strange Encounters of the Checkout Kind

Add a note



1. On the top ribbon, click the **Invoice/Quote** module.
2. On the bottom ribbon, click **Add Note** (F2).
3. Enter a note.
4. Click **Checkout** (F8), and then complete the transaction.



Strange Encounters of the Checkout Kind

Search for a note



1. On the top ribbon, click the **Reports** module.
2. In the **Report Area Pane**, click **Sales Analysis**, and then click **What I Need To Know**.
3. In the **Report List** pane, click **Transaction Report**.
4. Click **Next** (F12).
5. In the **Keyword Search** list, select **NoteField**.
6. In the box next to the **Keyword Search** list , enter the note text you want to search for.
7. Click **Run Report** (F12).



Strange Encounters of the Checkout Kind

About 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 prompt payment discounts.

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



Strange Encounters of the Checkout Kind

Chad Klein



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED