

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



Wood You Believe – New Lumber Features

Charles Owen



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



PALADIN DATA CORPORATION™

BizCoach Webinars



WOOD YOU BELIEVE – NEW LUMBER FEATURES

Agenda

- 1.
- 2.
- 3.



Paladin's new lumber features

- Profit analyst
- Special order enhancements
- Footage calculator (tally) enhancements
- Minimum margin enhancements
- Thousand board foot (MBF) cost wizards



WOOD YOU BELIEVE – NEW LUMBER FEATURES

Profit Analyst

The screenshot shows the Paladin Point of Sale software interface. The main window displays an invoice with a table of items. A 'Profit Analyst' window is open over the invoice, showing a table with columns for Item, Cost, Profit, and Margin. The main window also shows a 'Checkout' button and a 'Customer Accounting Access' dialog box.

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

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

Customer Accounting Access	<input checked="" type="checkbox"/>
Save ACH Data	<input type="checkbox"/>
Profit Analyst	<input checked="" type="checkbox"/>
Reset	Save

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 and hold **Alt** and then press **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**.



WOOD YOU BELIEVE – NEW LUMBER FEATURES

Special order enhancements

- 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

Special Order Default Deposit

- None
- 25%
- 50%
- 100%
- Other

Signature Required

Enable Signature Required

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



WOOD YOU BELIEVE – NEW LUMBER FEATURES

Footage calculator enhancements

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

- Saved values can be edited.
- You can open the footage calculator in two ways, after you highlight the item row:
 - On the **Edit** menu, click **Footage Calculator**.
 - Press Ctrl+K.
- The footage calculator works with purchase orders.



WOOD YOU BELIEVE – NEW LUMBER FEATURES

Min margin enhancements

- Set minimum margin by department.
- Export a department list to Excel and print it (optional).

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 Foms 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

Name Department label number

#	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

New Remove Export



WOOD YOU BELIEVE – NEW LUMBER FEATURES

MBF cost wizards

1 Item Cost		Last:			
Avg:	Mkt:	Cost	Qty / Date		
1.862	2.187	2.187	50		
PO: 349.05	410.00	Cost Per: 410.06	23-Mar-16		
2 Pricing Levels		Marg	Ref	Rounding	
Quantity	Sale Price	Margin	Ref	Rounding	
1	8.99	79.3	75.7	0	_Default

- ❑ 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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Learn More

For detailed descriptions of these features, click any of the following titles. Or, on the **Help** menu, click **Features and Fixes**, and then search for the title.

- [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](#)

You can also find step-by-step procedures for many tasks in our [Knowledge Base](#).

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

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