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FREE ADVANCED TRAINING



The Power Of Advanced Lookup

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TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



The Power Of Advanced lookup

What we will cover

- What is the Advanced lookup?
- How to use it to look up Inventory.
- How to use it to look up Customers.
- How to use it to easily lookup and interact with a customer's history.
- Vendor Website.





The Power Of Advanced lookup

What is the Advanced Lookup?



- Advanced Lookup is a powerful tool found in every module (besides Reports) by pressing F1.
- It can be used in the Invoice/Quote Module to lookup:
 - Inventory
 - Customers
 - History
 - Vendor's website
- In the Customer Module it help you find customer information and history.
- In the Inventory Module it can be used to find inventory items and vendor's website.





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Inventory Lookup

Qty	Part Number	Mfg PartNumber	Description
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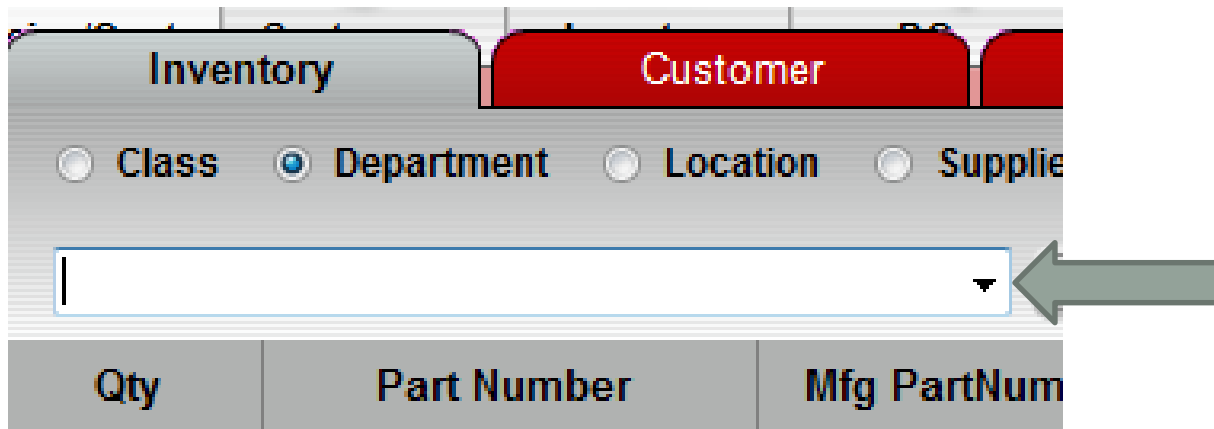
Can look up Inventory by many different ways:

- Class
- Department
- Location
- Supplier
- Keyword (allows for the greatest margin of error)
 - Exact Phrase – will search for that exact order of characters inputed
Ex. Battery Lithium vs. Lithium Battery



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Inventory Lookup Cont.



- ❑ Class and Department advanced lookup searches allow you to click the “drop-down” arrow to see all available departments and classes.
- ❑ Classes allow you to see the class and sub classes within that class to narrow your search even farther.
- ❑ F1 Results allows you to search within the results found and then toggle through the corresponding items by using F3 and F4.



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Customer Lookup

The screenshot shows a software interface with a top navigation bar containing four tabs: 'Inventory' (red), 'Customer' (grey), 'History' (red), and 'Special Order' (red). Below the tabs is a search section with five radio buttons: 'All' (selected), 'Name', 'Account Number', 'Address', and 'Rewards Number'. A 'Keyword Search' text box is followed by a 'Find >>' button. At the bottom, a table header is visible with columns: 'Status', 'Chg', 'Customer', 'Reward #', 'Account #', and 'Address'.

- Customer's can be searched for by:
 - All
 - Name
 - Account Number
 - Address
 - Phone
 - Rewards number

- F8 to add selected customer to the invoice.



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History

Qty	Part Number
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- ❑ Invoice allows our clerks type in an invoice number or scan the barcode at the bottom of a customer's receipt.
 - ❑ This will bring up all the items on that specific invoice with the specific prices it was sold to that customer.
 - ❑ You can always double click on the item to bring up a copy of the original invoice to reprint and/or verify accuracy.
 - ❑ Putting a negative quantity in the item we want to return will allow a quick return of that specific item for the price it was sold for.



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History

Qty

- ❑ Part allows you to type in a part number or scan the barcode on the item, to see the selling history of that item.
 - ❑ If you have a Part + Customer selected it will only bring up the transactions that the selected customer has purchased this item.
 - ❑ You can always double click on the item to bring a copy of the original invoice to verify accuracy or create a reprint.
 - ❑ Putting a positive or negative quantity in the item and pressing F8 will add that item in the desired quantity to the invoice.



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Vendor Site



- This allow you and your employee's to access you vendor websites without leaving the Paladin system. It can be accessed by pressing F2 once in the Advanced lookup.
- Not available in the Customer Module's Advanced Lookup as that is built to find customer's not inventory.
- File → Setup → Supplier → Website URL to enable this functionality.

Website URL

<https://unitedhardware.com/>

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Recording available at:

paladinpointofsale.com/webinars

[See KBA: About Advanced Lookup](#)

