

EXCELLENCE IN COACHING



Go Faster with Paladin Shortcuts and Time Saving Features

By: Chad Klein

<http://paladinpointofsale.com/webinars/>



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Go Faster with Paladin Shortcuts and Time Saving Features



- Paladin Quick Keys
- Windows Quick Keys
- Efficiency configurations
- Efficiency features





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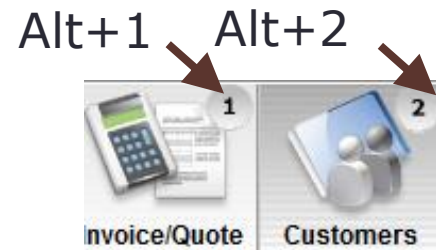


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Paladin Quick Keys

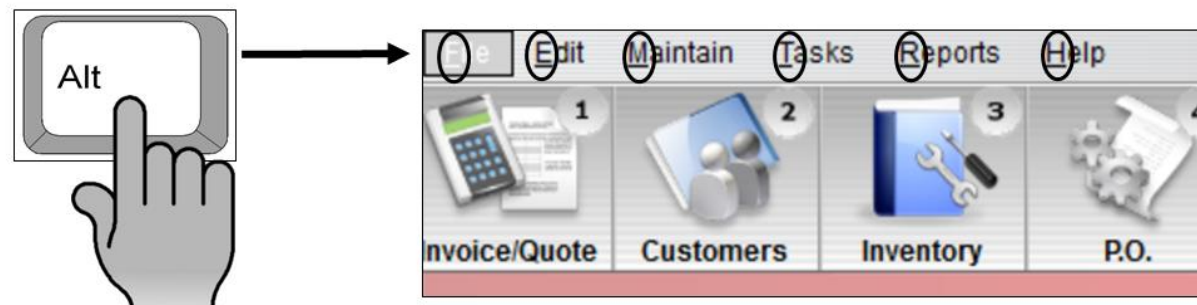


- Alt+<number>: Opens a module on top ribbon



- Alt+<letter>: Press and hold the Alt key to show the underlined shortcut letters for the top menu. Then press the shortcut letter to open the menu.

Example: Alt+F opens the **File** menu.



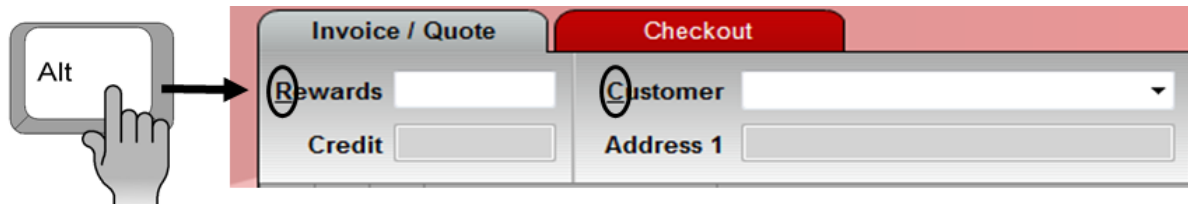


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More Paladin Quick Keys



- Alt + <letter>: In a module or **Advanced Lookup**, press and hold the Alt key to show the underlined shortcut letters for the fields. Then press the shortcut letter to put the cursor in that field.
Example: Alt+R will put the cursor in the **Rewards** field.



- F<#>: Press a function key instead of clicking a button on the bottom ribbon.
Example: F3 will delete a selected line item.



- PgUp & PgDn: To move sequentially from one tab to the next in any module (except Reports), you can use the Page Up (PgUp) and Page Down (PgDn) keys on your keyboard

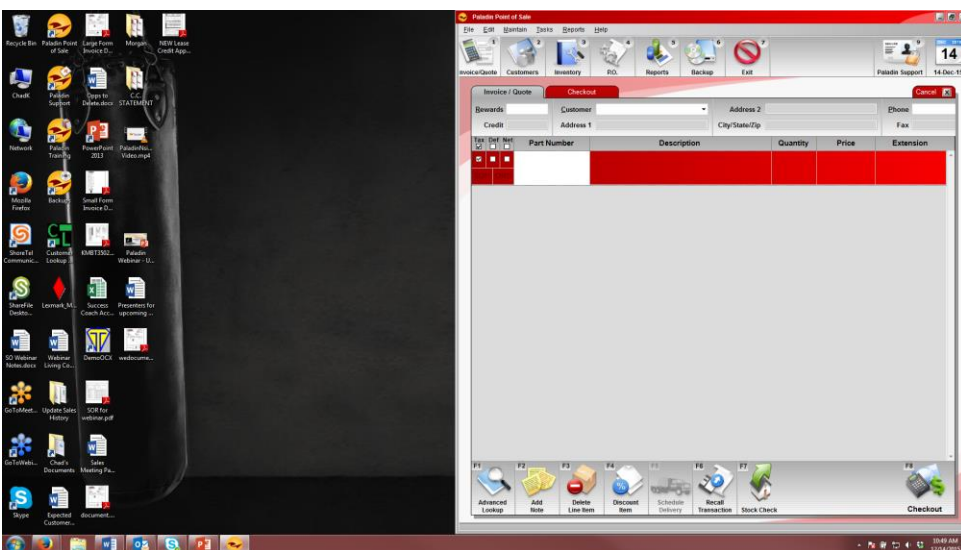
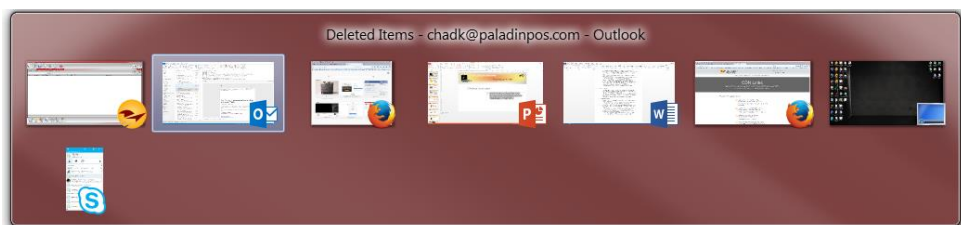


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Windows Quick Keys



- ❑ Alt+Tab: Displays a window that shows all open programs on your computer. While you hold the Alt key, press the Tab key again to cycle through the programs.
- ❑ Windows Logo + <Left or Right arrow>: Displays a window on the left or right of the screen.
- ❑ Windows key + Up arrow: Displays a window in full-screen mode.
- ❑ Alt + F4: Closes the current program.

For more Windows quick keys, see [Keyboard shortcuts for Windows](#).



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Efficiency configurations



Set these configuration options on the **Company** tab in the **Paladin Configuration** window. To open this tab in Paladin Point of Sale, on the **File** menu, click **Setup**, and then click the **Company** tab.

- To set access to the obscure inventory folder: In the **Obscure File Supplier Precedence** pane, under **Obscure File Access**, select access options for the obscure inventory folder.
- To set the default quantity price discount to the highest price level: In the **Default Invoice Quantity Handling** pane, select the **Default to Largest Pricing Quantity when added to Invoices** checkbox.
- To set the default number of stock days in the **Suggested Order Report** and **PaladinN Sight™**: In the **Inventory** pane, enter a number in the **Default Stock Days** field.
- To stay in the current inventory tab set default focus to the **Part#** field in the **Inventory** module: In the **Inventory** pane, select the **Keep Focus on Part Number during Inventory Management** checkbox.



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Efficiency features

Qty	Part Number	Description
0.00	037103152688	SWAGING TOOL,25 HAND
0.00	064747503002	P3816A CHAIN SAW 967196401 3
0.00	044600016290	01629 CLOROX DISINFECTING WI
0.00	718103167956	295300 WHT VNTY WASTEBSKT 6Q
0.00	064747503002	P3816A CHAIN SAW 967196401 3
0.00	3037777	BATTERY LITHIUM 3V 1616

For quick access to a customer's purchasing history, follow these steps:

1. On the top ribbon, click **Invoice/Quote**
2. Select a customer to view.
3. On the bottom ribbon, click **Advanced Lookup**, and then click the **History** tab.
4. Select **Invoice** and then click **Find**. You can perform any of the following actions:
 - To add or return item(s) to the invoice, enter a **Qty** value and then press F8.
 - To view the original invoice, double-click the line item.
 - To sort the list by the values in any column, click the column header.

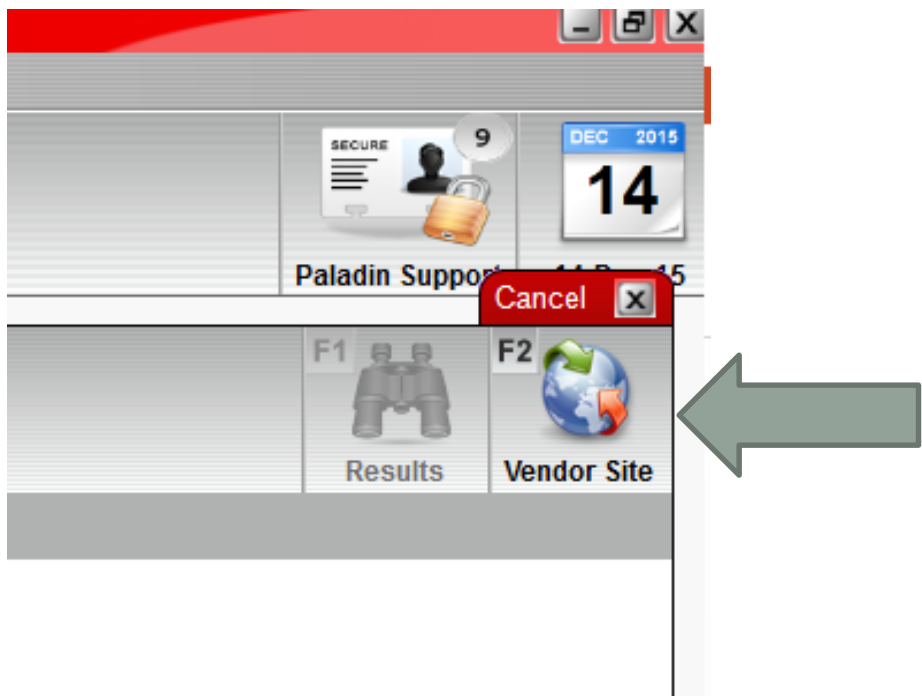


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More efficiency features



You can use **Advanced Lookup** to quickly access a vendor's website. To do this:

1. On the **File** menu, click **Setup**.
2. Click the **Supplier** tab.
3. In the **Suppliers** pane, in the **Website URL** text box, enter the vendor's website address.

Email Address	<input type="text"/>
Website URL	<input type="text" value="http://www.orgill.com"/>
Account Number	<input type="text"/>



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

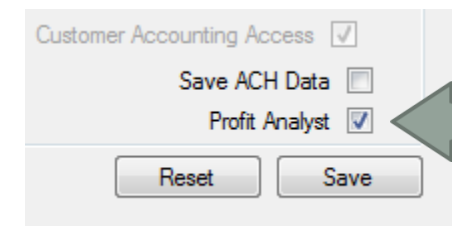
To see the cost, profit, and margin for an item and for the entire invoice use Profit Analyst in the **Invoice/Quote** module.

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**. (**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**.





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To sell an item in varying lengths such as molding or rebar:

1. Bring up item in **Invoice/Quote**
2. Put Cursor in the **Quantity** Field
3. Alt + K brings up the **Tally Calculator**

Pieces	Feet	Inches
1	2	6
2	8	0
4	4	8

Done

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54549	MOLDING1/2RND3/8X11/16X8	FT	37.17 \$	0.53 \$
12	0		54549	0.53			
1@2-6.00 2@8-0.00 4@4-8.00					NOTES		



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To create a preset report:

1. Select Report Desired in **Reports Module**
- **F11** will be **Edit Preset** until a report is selected
2. Select **Create Preset**
3. Select Which F<#> Key to assign it to
4. Define your report
5. Select Save or **F12**



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