

# EXCELLENCE IN COACHING

## TOP 10 MOST OVERLOOKED FEATURES

by Charles Owen



**Technical Level:**

Easy

Intermediate

Advanced



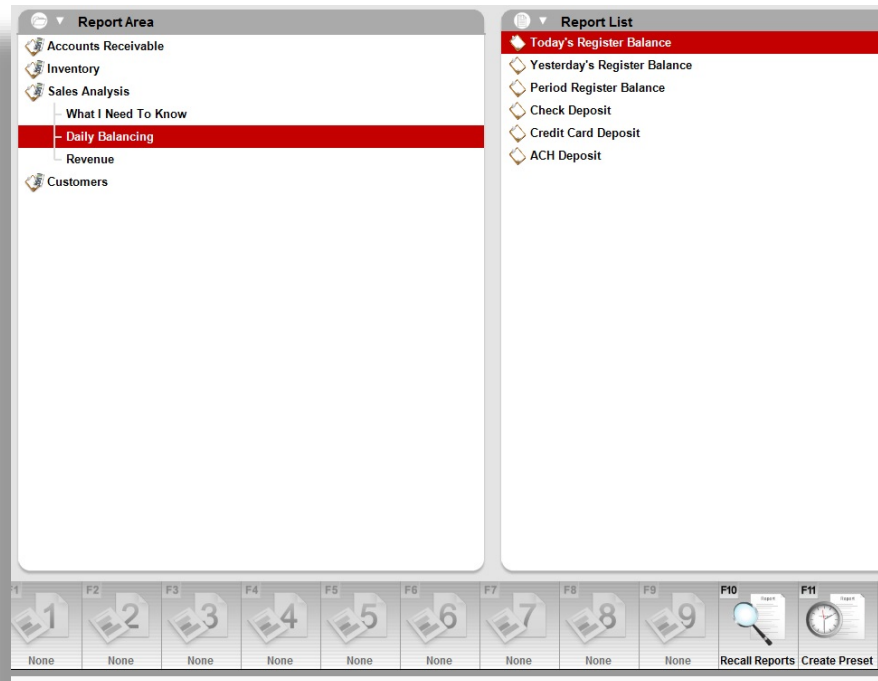
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### ONE (1)

## Preset Reports



- Turn reports into a single push-button command using your function keys
- No more having to select report ranges or sorting options
- Program report to run at night and be retrieved anytime
- End of month reports will auto-generate
- Run valuation reports and customer balance reports automatically



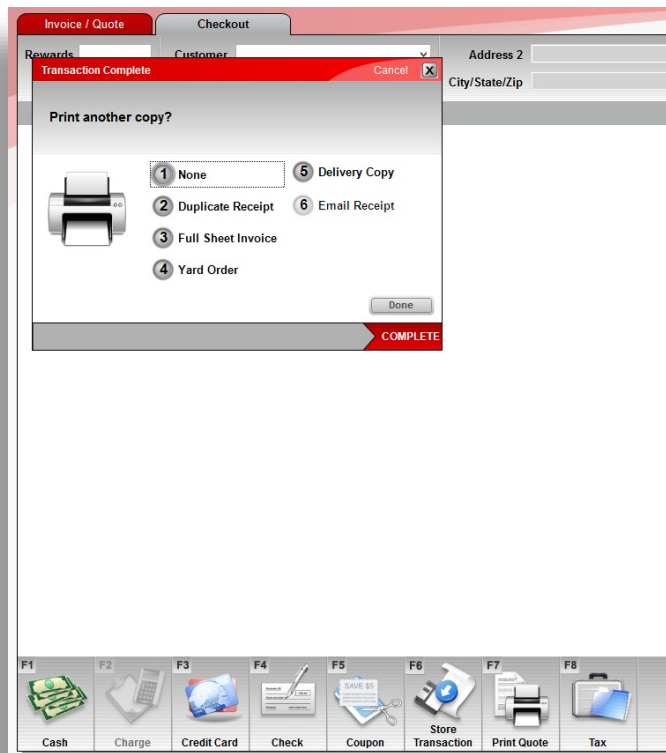
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### TWO (2)

## Email Option



- Auto email invoices at time of purchase
- Auto email statements and invoices during statement runs
- Auto email purchase orders
- Option to manually send invoice or statement copies upon request, anytime



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## THREE (3)

# Recalling Past Invoices

# Collins Building Materials

123 Test Road  
Beverly, CA 94012

## INVOICE

INVOICE #	64
ACCOUNT #	2
DATE	25-Mar-15
TIME	09:37
EMPLOYEE	1
TERMINAL	5
PAGE #	1

**SOLD TO:**

C/312 307-3350  
EWMEN PROJEIT  
Jasper, TN 37347

**SHIP TO:**

EWMEN PROJEIT  
Jasper, TN 37347

ITEM	DESCRIPTION	QTY	SALE	U/M	EXT
000346387452	PS20-2A 12V LITH POCK DR	1.00	109.99		109.99
.045734915565	MINICRAFT SOCKET SET	1.00	12.99		12.99
000118040916	2-1/2 SS SINK STRAINER	2.00	6.49		12.98
000118041364	15X15 XG 5S BAR SINK	3.00	42.99		128.97
				CASH CHANGE	280.00 15.07

I AGREE TO PAY THE ABOVE TOTAL ACCORDING TO THE POSTED TERMS AND CONDITIONS

SIGNATURE \_\_\_\_\_  
Authorized Signer

### DUPPLICATE

SUBTOTAL \$	264.93
TAX \$	0.00
<b>TOTAL \$</b>	<b>264.93</b>

We're your source for  
seasonal supplies and  
all your hardware needs.

- Recall invoices from:
  - Invoice/Quote Module
  - Customer Module
  - Inventory Module
- Search by:
  - Customer
  - Part Number
  - Customer & Part Number





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### FOUR (4)

## Setting Supplier Ratios

The screenshot shows a software interface with three main sections:

- 1 Stock Information**: Contains fields for Order Qty (250), Min/Display (0), Max Qty (999), Order % (100), Sug. Min (0), and Sug. Max (250).
- 2 Seasonal Dates**: Contains a Seasonal checkbox, Begin Date (01 Jan), and End Date (01 Jan).
- 3 Suppliers**: Contains fields for Supplier 1 (105 - G-TECHT GLOBAL CORP.), Order # (LUX-R30S), Supplier 2, Order #, Sup. Ratio (0.004), and Broken Carton.

- Order using one UOM and sell using another UOM
  - Order 250 feet, PO actually orders 1 spool of 250ft
  - Upon receiving, converts 1 spool back to 250 feet for a SOH of 250
- Auto calculate quantity discount breaks between per foot retail and per spool retails
- Works well for minimum order quantity requirements
- Warning options available to cashiers during checkout



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### FIVE (5)

## Add Alternate Part Number at Invoicing

- Enables cashiers to associate non-scannable items with existing inventory sku's
- Activate in File/Setup Company tab
- **CAUTION:** Can be a dangerous if cashiers don't understand how it works



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### SIX (6)

## New Customer Accounting Control

- First, this feature must be activated in Setup/Company tab
- Secondly, change employee permissions
- Gray's out credit window
- Blocks out profit button
- When adding or modifying customer records it blocks out credit limit field



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### SEVEN (7)

## Special Orders

The screenshot shows a software interface with a menu bar (File, Edit, Maintain, Tasks, Reports, Help) and a toolbar with seven numbered icons. Below the toolbar are four tabs: Inventory, Customer, History, and Special Order. The Special Order tab is active, displaying a form with the following fields:

- Order Number: [text input]
- ☐ Do not create POs for any item past this point
- Description 1: [text input]
- Description 2: [text input]
- Supplier: [dropdown menu]
- Cost: [text input]
- Sale Price: [text input]
- Qty to Order: [text input]
- Desired Date on Hand: 25-Mar-15 [calendar icon]

- Special Order feature performs these functions automatically from *Invoicing*:
  - Creates new sku(s) and sets 0 Max
  - Marks new item as On-Hold
  - Creates pending P.O. for all suppliers
  - Creates new customer record
  - Stores the S.O. with customer file
- Use the Special Orders to:
  - Add custom/new sku's
  - Add catalog sku's
  - Add in-store sku's to same invoice
  - Create and track S.O.'s from inception, to ordering, to receiving, and eventually to the final sale





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### EIGHT (8)

## New Quantity Discount Break “Fixed Ref Margins”

The screenshot displays a software interface with a menu bar (Reports, Help) and a toolbar with icons for Inventory, P.O., Reports, Backup, and Exit. Below the toolbar are tabs for Order Control, Pricing, and General. The main area shows item details for '2-2.4-6X500 ALUM USE WIRE'. It includes fields for On Order, Defective, On Hold, and Stock On Hand, all currently at 0. The 'Item Cost' section shows Avg Cost at 0.88, Mkt Cost at 0.88, Last Cost at 0.00, Last Qty at 0, and Last Date at 01-Jan-00. The 'Pricing Levels' section is a table with columns for Quantity, Sale Price, Margin, Mkt Margin, Ref, and Rounding. It lists four pricing levels with increasing quantities and decreasing margins. A 'Reviewed' date of 13-Mar-15 is shown at the bottom left.

Quantity	Sale Price	Margin	Mkt Margin	Ref	Rounding
1	1.95	54.9	54.9	0	
100	175.50	49.9	49.9	-10	(None)
250	390.00	43.6	43.6	-20	(None)
500	682.50	35.5	35.5	-30	(None)

- EDI price changes – Trickle Down Pricing
- Eliminates the changing of quantity discounting pricing when a price change occurs
- Establish a percentage discount and never look back



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### NINE (9)

## Kit Feature

The screenshot shows the 'Paladin Configuration' window with the 'Classes' tab selected. In the 'Classes' list, '121212 KIT' is highlighted. A large green arrow points from this class to the 'Invoice' tab in the 'U/M' section. The 'Invoice' tab shows the following settings:

- ☐ Enable Type-2 UPC
- Barcode Format: Variable Weight (6 part, 4 p)
- ☐ Manager Approval Required
  - ☐ Discounting Requires Manager Approval
  - ☐ Returns Require Manager Approval
  - Require Manager Approval for Returns Over \$ 0
- ☒ Require Signature for Returns
- ☒ Enable Kit Functionality
  - Kit Class Number: 121212
- ☒ Enable Hiding Kit Components
- ☒ Enable Inventory On Hold
- ☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts
- Open Cash Drawer For Selected Payment Types
  - ☒ Cash
  - ☐ Charge
  - ☐ Credit Card
  - ☒ Check

- Add multiple items with a single code or sku
- Charge for each item separately or charge for one roll-up price
- Hide items in a formula or recipe from the receipt
- Margin control may be compromised if not setup correctly
- Requires activation in Setup/Company
- Knowledgebase article is available



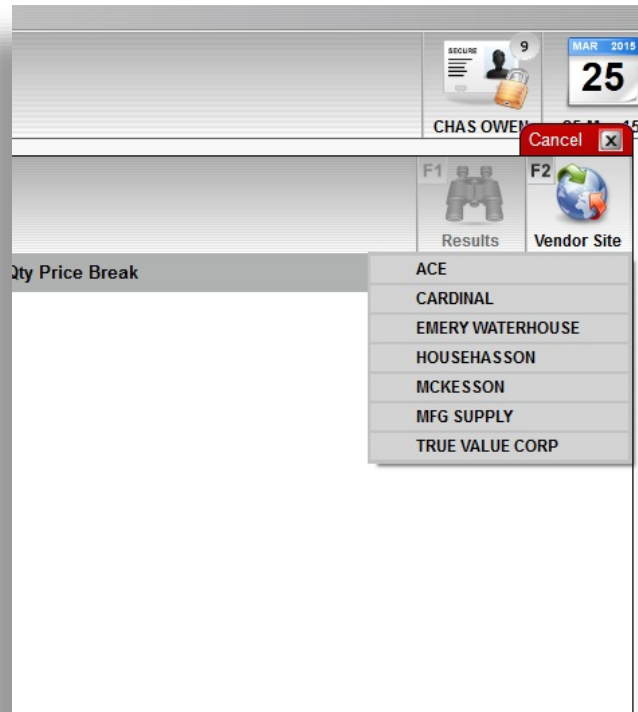
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### TEN (10)

## Integrated Web Browser



- Advanced Lookup – Vendor Tab
- See product pictures
- Check warehouse inventory levels
- Must be setup in Setup/Supplier tab
- Limits employee access to vendor websites
- As an option you can access photos



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