



Shortcuts to Becoming a Paladin Power User

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WHAT YOU'LL LEARN

- Right-click magic
- Invoice/Quote menu
- PO menu
- PO Receive menu
- Paladin Quick Keys
- Windows Quick Keys
- More efficiency tips

Quick access (right-click) menus

Menus are available when you create an invoice or purchase order (PO) and when you receive a PO.

Part Number	
P1234	1 GALLON BA
P1234	55.00
PB5678	3" FLAT PAINT
PB5678	1.50



right-click

Invoice/Quote menu

- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Insert Dynamic Kit Group
- Tax Holiday (Ctrl + T)
- Copy (Ctrl + C)
- Paste (Ctrl + V)

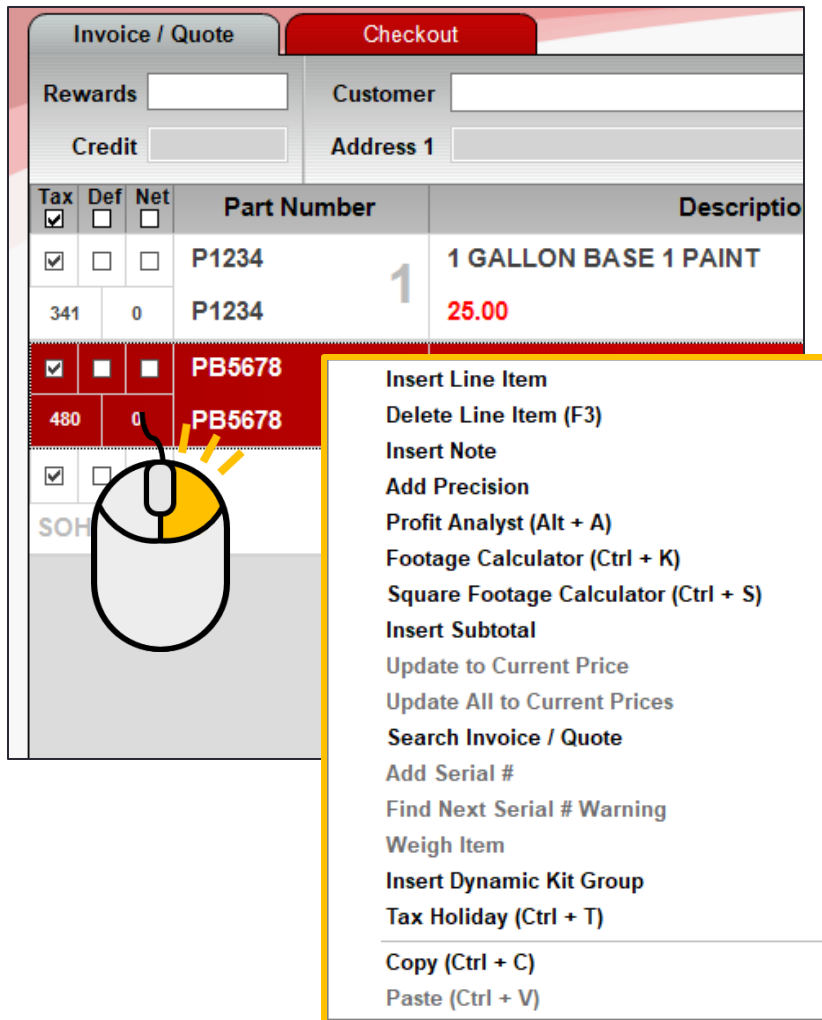
PO menu

- Insert Line Item
- Insert Note
- Delete Line Item (F3)
- Add Precision
- Dropship
- Copy (Ctrl + C)
- Paste (Ctrl + V)

PO receive menu

- Update PO Order Quantity and Cost
- Add Serial #
- Find Next Serial # Warning
- Copy (Ctrl + C)
- Paste (Ctrl + V)

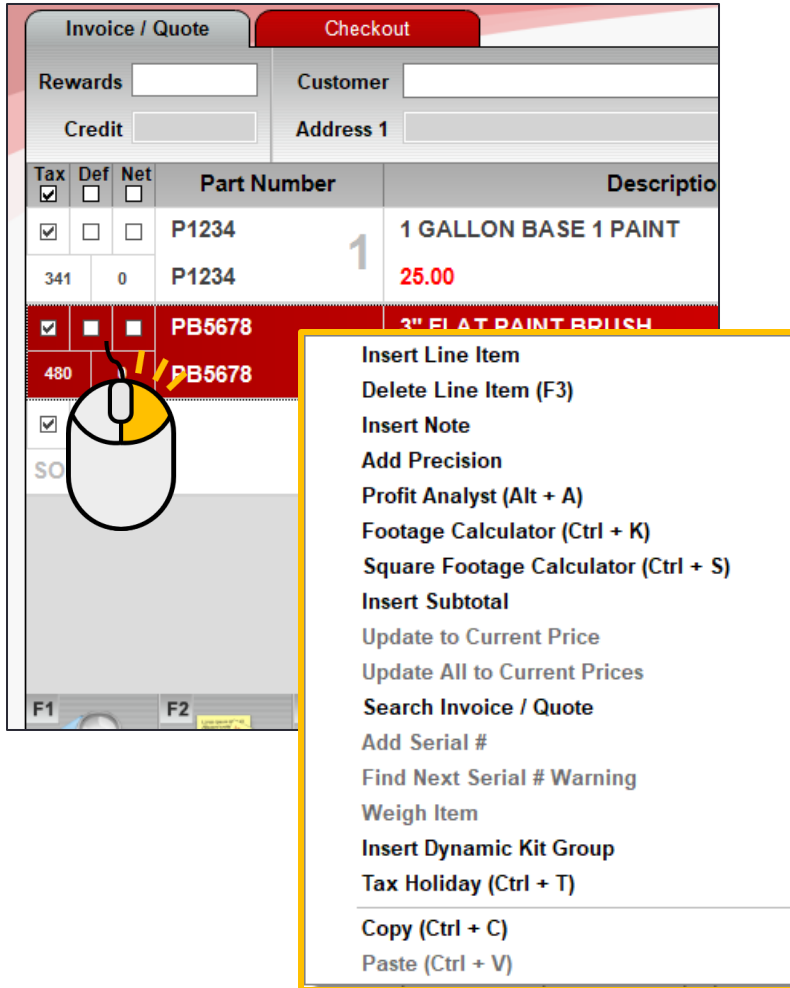
Right-click magic



- Right-click a line item on an invoice or purchase order to get immediate access to commonly-used tasks and tools.
- Menus increase efficiency during checkout and ordering.
- Menu options are “grayed out” when:
 - They do not apply to the line item.
 - The employee does not have permission.
 - The feature is not enabled.
- Alternate keyboard shortcuts appear in parentheses.

Note: Invoice/Quote menu shown.

Invoice/Quote menu

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P1234	1 GALLON BASE 1 PAINT
341	0		P1234	25.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH
480			PB5678	

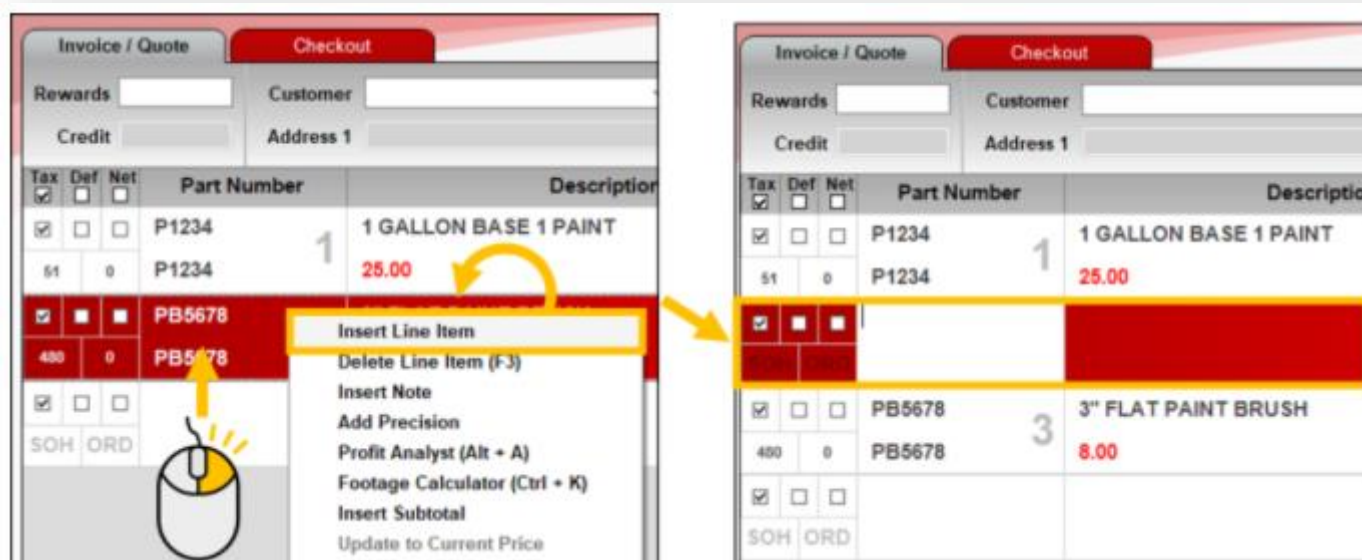
- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Insert Dynamic Kit Group
- Tax Holiday (Ctrl + T)
- Copy (Ctrl + C)
- Paste (Ctrl + V)

- Multiple menu options are available during invoicing including:
 - Basic line editing
 - Access to Profit Analyst and footage (tally) calculators
 - Invoice subtotals
 - Invoice search
 - Tax Holiday tool
 - And more

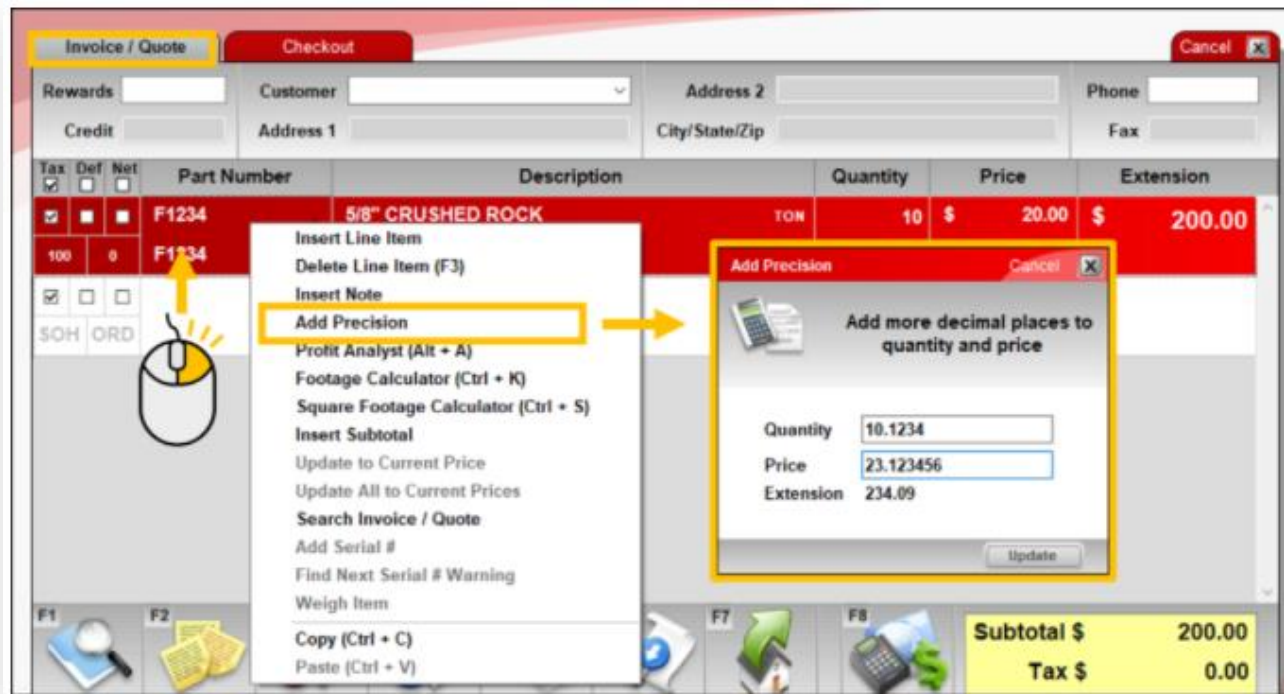
Note: Insert Dynamic Kit Group option is not currently available

Invoice/Quote: Line item edit commands

- Select **Insert Line Item** to add a new line item above the selected line item.
- Select **Delete Line Item** to delete the selected line item.
 - Keyboard Shortcut: F3 (Same as **Delete Line Item** on bottom ribbon).
- Select **Insert Note** to add a note above the selected line item.



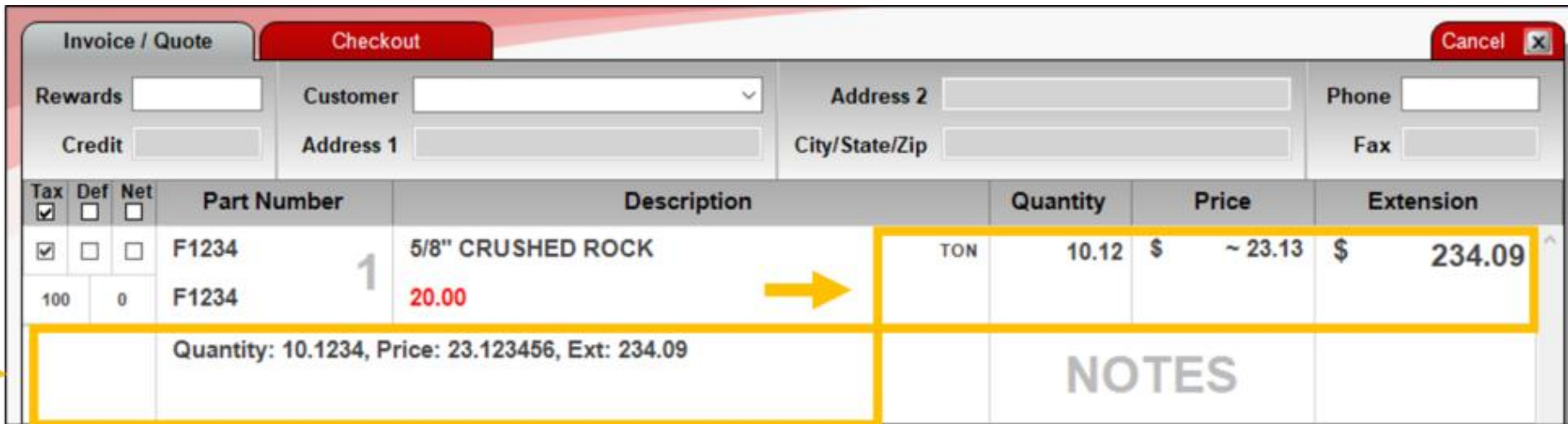
Invoice/Quote: Add Precision



- Select **Add Precision** to enter more precise **Quantity** and **Price** values.
 - Quantity: Up to 4 decimal places
 - Price: Up to 6 decimal places
- As you adjust the **Quantity** and **Price**, a real-time **Extension** value is calculated.
- Click **Update** to apply precision to the line item.

Invoice/Quote: Add Precision

- **Quantity, Price and Extension** are updated to two-decimal places.
- Full values are documented in a note below.



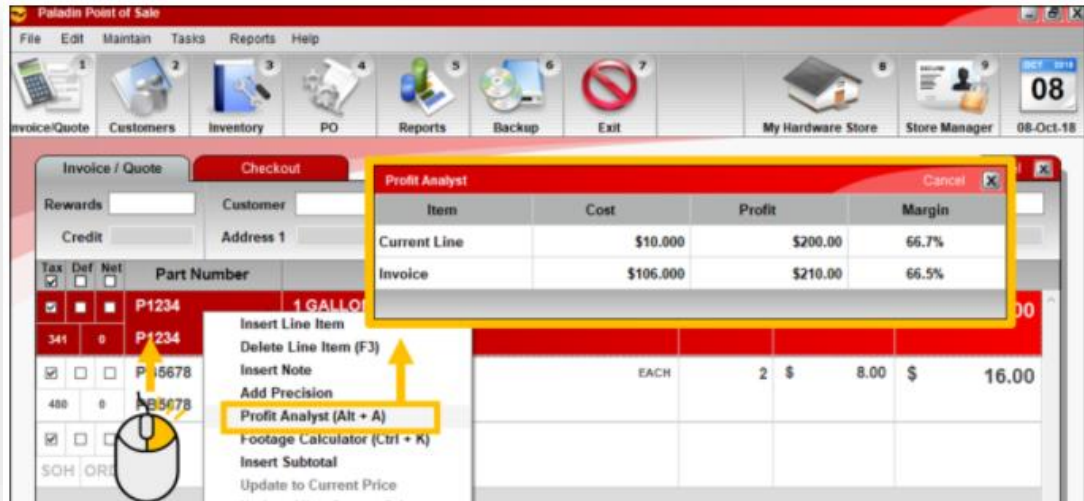
The screenshot shows the 'Checkout' window for an 'Invoice / Quote'. It includes fields for Rewards, Credit, Customer, Address 1, Address 2, City/State/Zip, Phone, and Fax. Below these is a table with columns: Tax, Def, Net, Part Number, Description, Quantity, Price, and Extension. A line item for '5/8\"

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F1234	5/8" CRUSHED ROCK	TON 10.12	\$ ~ 23.13	\$ 234.09
100	0		F1234	20.00			

Below the table, a note states: 'Quantity: 10.1234, Price: 23.123456, Ext: 234.09'. A 'NOTES' section is also visible at the bottom right.

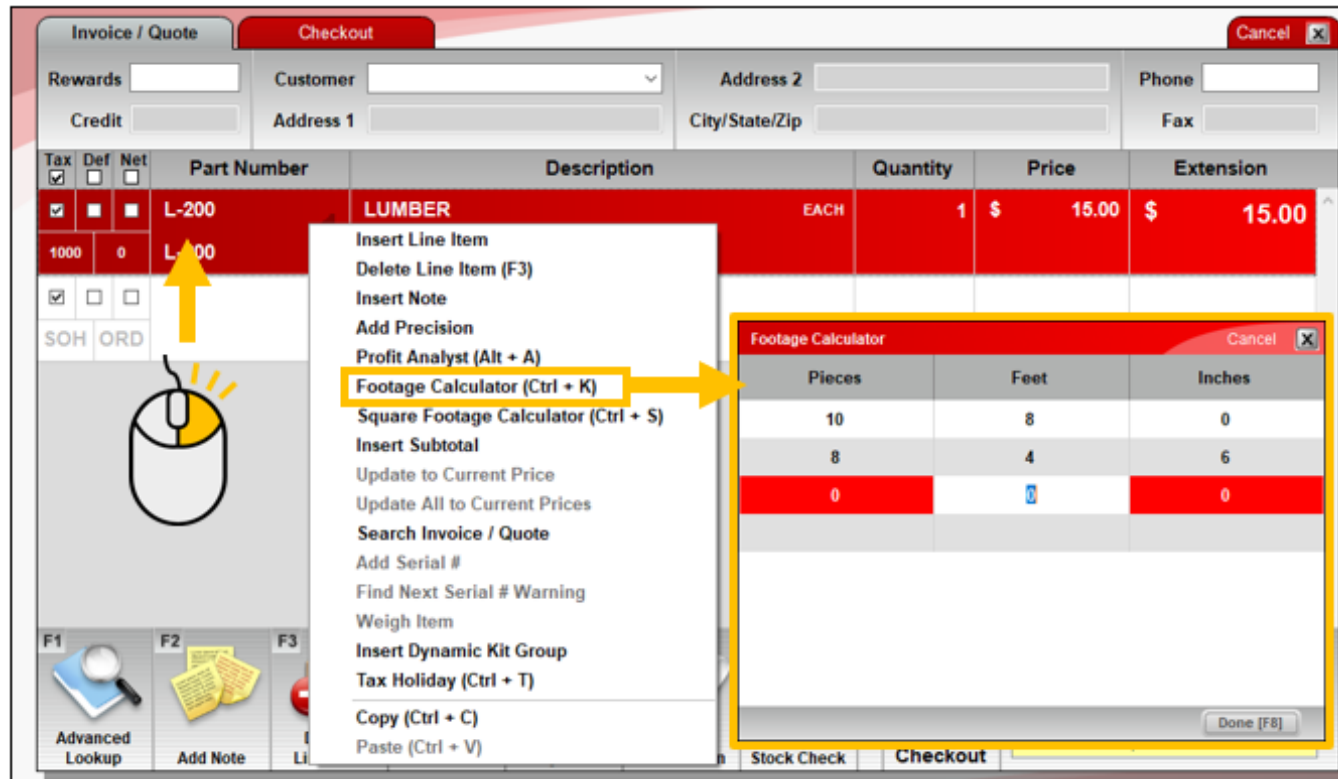
Tip The line item **Price** may appear as an approximate value shown with a tilde (~) and appear slightly different than the price you entered. This variation is expected. The additional precision is always maintained in the line item **Extension**.

Invoice/Quote: Profit Analyst



- Select **Profit Analyst** to view the cost, profit and margin for:
 - The current line item.
 - The invoice or quote total.
- An employee must be explicitly granted access to view this tool.
- Keyboard shortcut: Alt + A

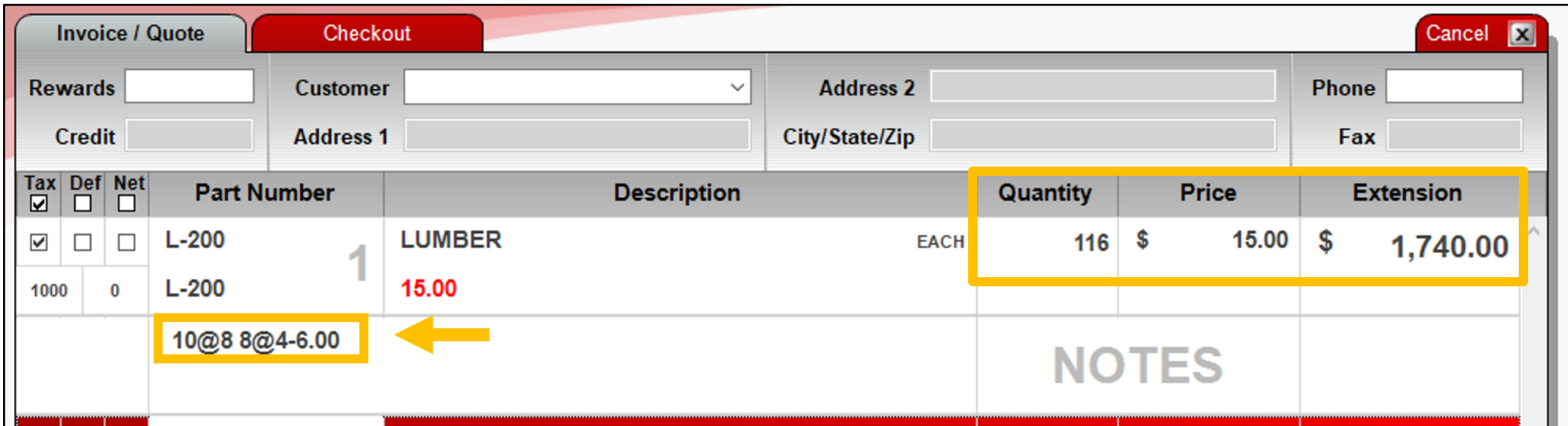
Invoice/Quote: Footage Calculator



- Select **Footage Calculator** to create a tally of items of different lengths.
- This feature is useful when selling items by the foot.
- Keyboard shortcut: Ctrl + K

Invoice/Quote: Footage Calculator

- The **Quantity**, **Price** and **Extension** are calculated from your entries.
- Details appear in a note below.



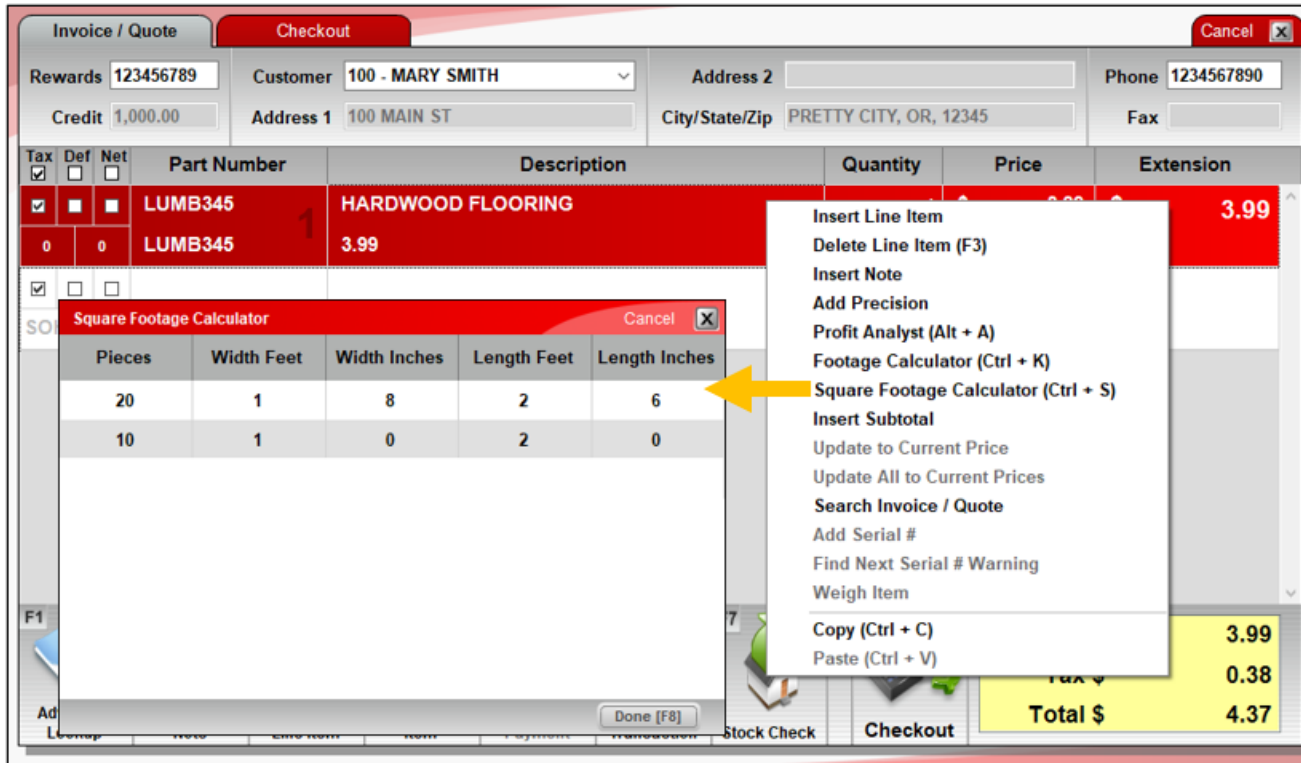
Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone
Credit Address 1 City/State/Zip Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L-200	LUMBER	116	\$ 15.00	\$ 1,740.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L-200	15.00			
1000	0		10@8 8@4-6.00				

NOTES

Invoice/Quote menu: Square Footage Calculator



Invoice / Quote Checkout Cancel

Rewards 123456789 Customer 100 - MARY SMITH Address 2 Phone 1234567890

Credit 1,000.00 Address 1 100 MAIN ST City/State/Zip PRETTY CITY, OR, 12345 Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	3.99			3.99

SO

Square Footage Calculator Cancel

Pieces	Width Feet	Width Inches	Length Feet	Length Inches
20	1	8	2	6
10	1	0	2	0

Done [F8]

Insert Line Item
Delete Line Item (F3)
Insert Note
Add Precision
Profit Analyst (Alt + A)
Footage Calculator (Ctrl + K)
Square Footage Calculator (Ctrl + S)
Insert Subtotal
Update to Current Price
Update All to Current Prices
Search Invoice / Quote
Add Serial #
Find Next Serial # Warning
Weigh Item
Copy (Ctrl + C)
Paste (Ctrl + V)

7

3.99

0.38

Total \$ 4.37

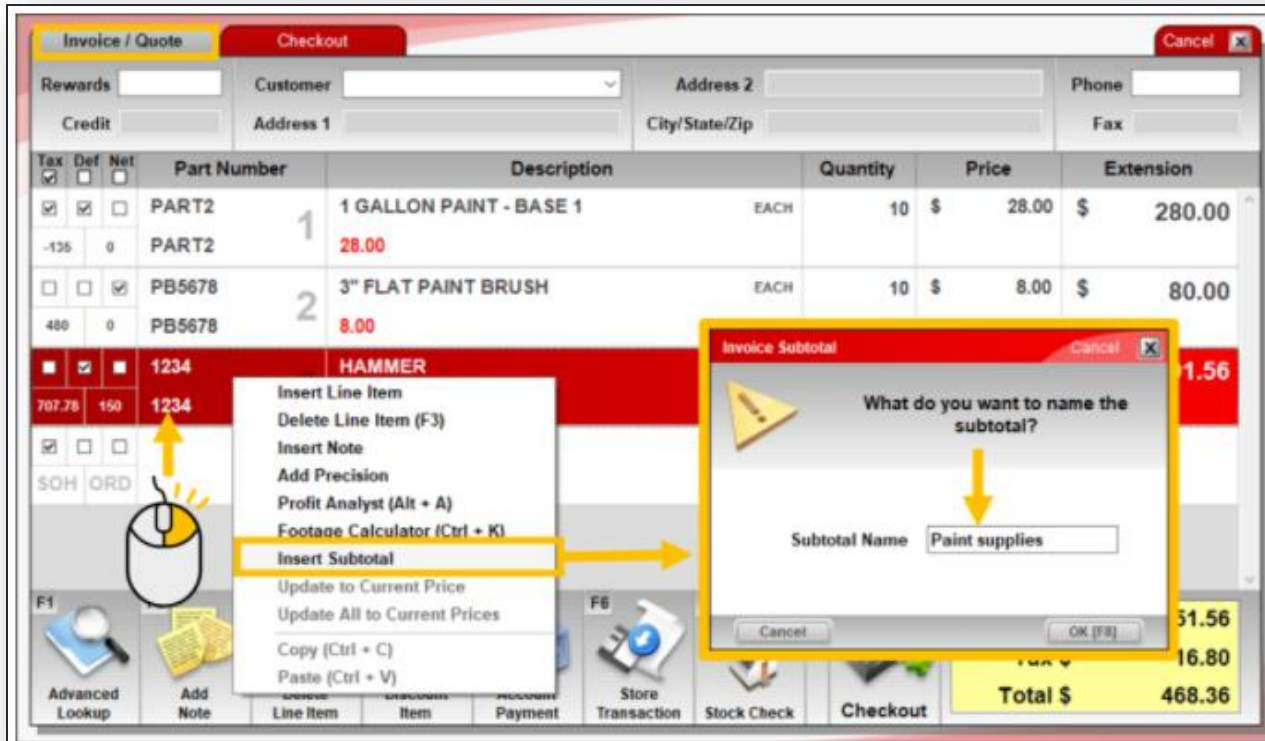
- Select **Square Footage Calculator** to create a tally of items of different lengths and widths
- This feature is useful when selling items by the square foot.
- Keyboard shortcut: Ctrl + S

Invoice/Quote: Square Footage Calculator

- The **Quantity**, **Price** and **Extension** are calculated from your entries.
- Details appear in a note below.

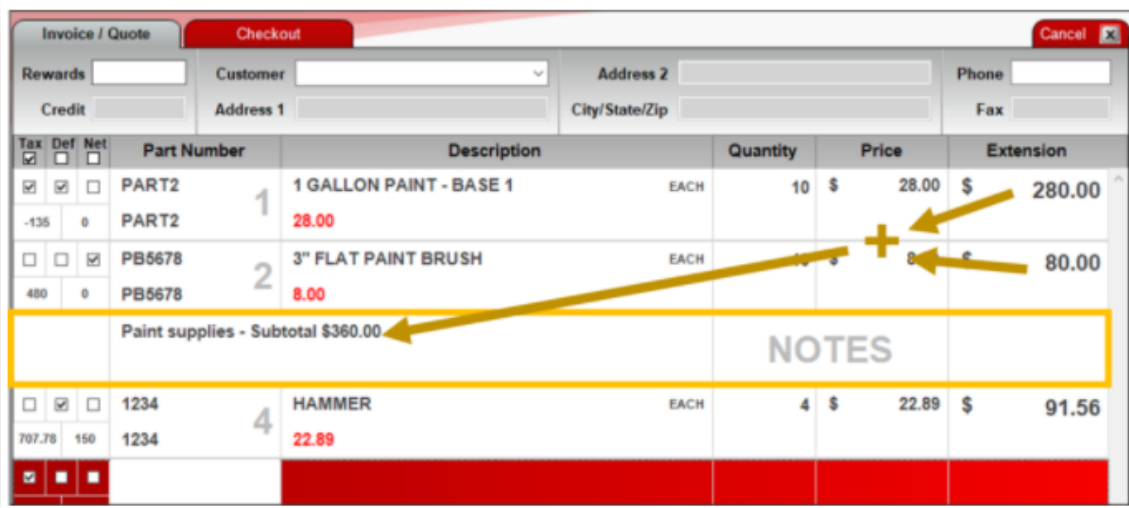
Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING	103.40	\$ 3.99	\$ 412.57
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345				
0	0						
20@1-8.00X2-6.00 10@1-0.00X2-0.00				NOTES			

Invoice/Quote menu: Insert Subtotal



- Select **Insert Subtotal** to insert a dynamic subtotal for items above the selected item.
- You are prompted to name for the subtotal, but a name is optional.

Invoice/Quote menu: Insert Subtotal

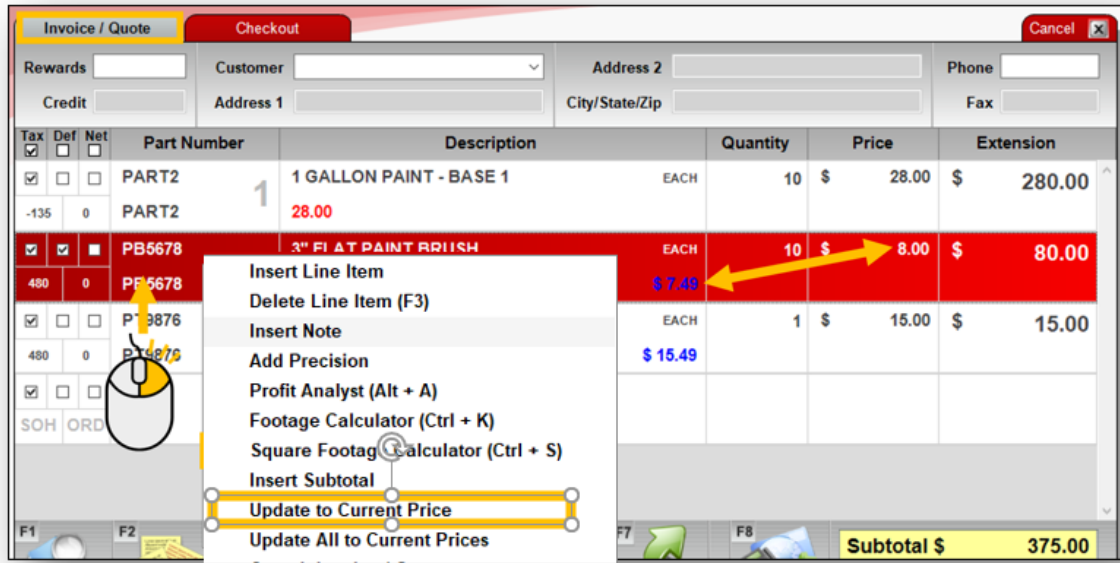


The screenshot shows the 'Invoice / Quote' window with the 'Checkout' tab selected. The window contains a table of items and a subtotal line. Yellow arrows indicate the flow of calculation: one arrow points to the 'Paint supplies - Subtotal \$360.00' line, and two arrows point to the '28.00' and '8.00' values in the 'Price' column, which are summed to reach the subtotal.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PART2	1 GALLON PAINT - BASE 1	10	\$ 28.00	\$ 280.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PART2			28.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH			80.00
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PB5678			8.00	
				Paint supplies - Subtotal \$360.00			
NOTES							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1234	HAMMER	4	\$ 22.89	\$ 91.56
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1234			22.89	

- The subtotal amount appears on a separate line and automatically adjusts when items are added, removed or changed.
- An invoice can have multiple subtotals.
- If no prior subtotal, the subtotal is calculated from the top of the invoice.
- Otherwise, the subtotal only includes invoice items after the prior subtotal.

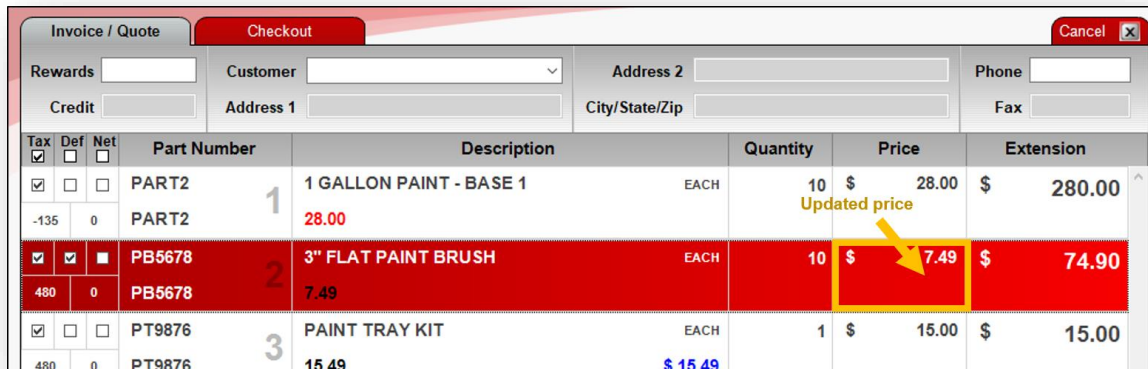
Invoice/Quote menu: Update to Current Price



The screenshot shows the 'Invoice / Quote' window with the 'Checkout' tab selected. A context menu is open over the line item '3" FLAT PAINT BRUSH' (Part Number PB5678). The menu options include: Insert Line Item, Delete Line Item (F3), Insert Note, Add Precision, Profit Analyst (Alt + A), Footage Calculator (Ctrl + K), Square Footage Calculator (Ctrl + S), Insert Subtotal, **Update to Current Price** (highlighted with a yellow box and a yellow arrow), and Update All to Current Prices. The line item's price is shown as \$7.40 in blue text, and the extension is \$80.00.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	1 GALLON PAINT - BASE 1	EACH	10 \$ 28.00	\$ 280.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	28.00			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH	EACH	\$ 7.40	\$ 80.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT9876	PAINT TRAY KIT	EACH	\$ 15.00	\$ 15.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT9876	15.49			
Subtotal \$							375.00

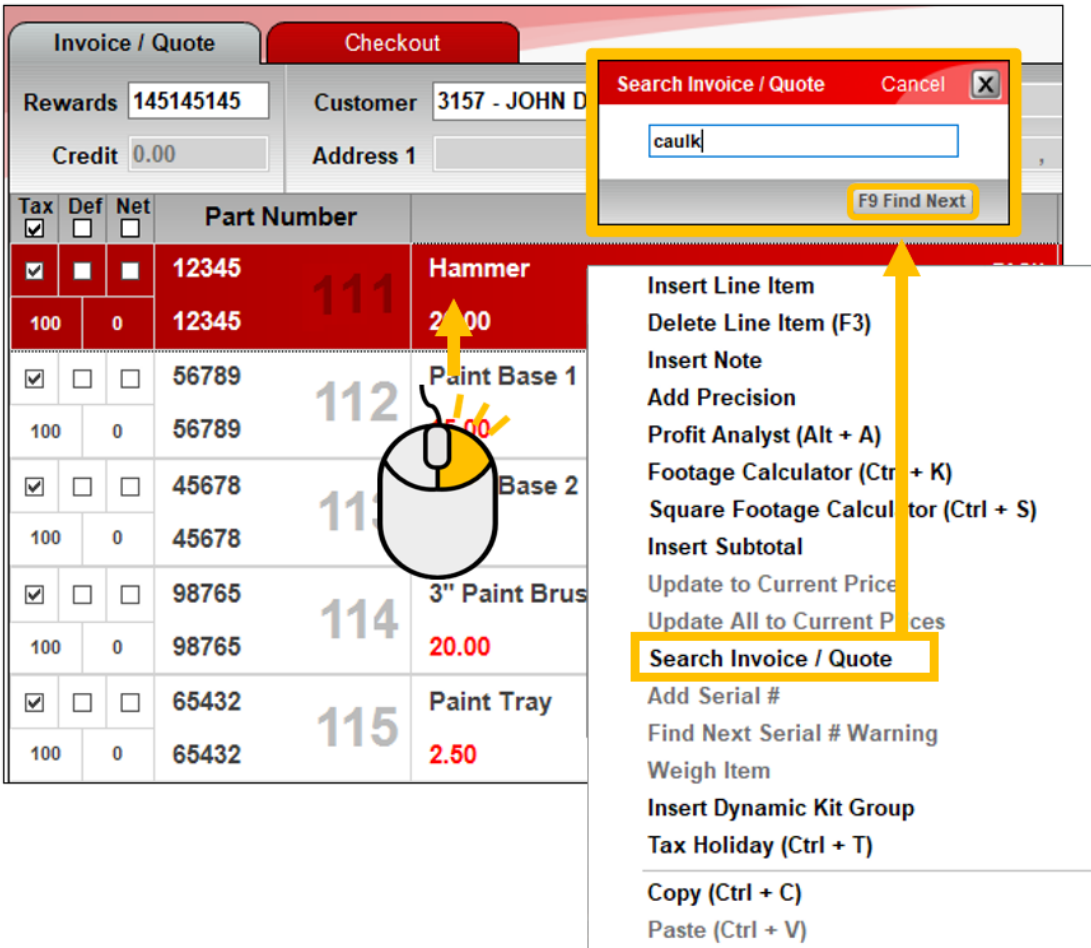
- Select **Update to Current Price** to update a line item on a recalled quote with the current retail price.
- Select **Update All to Current Prices** to update all line items on the recalled quote to current retail prices.
- **Tip** On a quote, when an item's saved price is different from its current retail price, the item's unit price appears in blue text.



The screenshot shows the 'Invoice / Quote' window after the 'Update to Current Price' action. The line item '3" FLAT PAINT BRUSH' (Part Number PB5678) now has a unit price of \$7.49 in blue text, and the extension is \$74.90. The line item 'PAINT TRAY KIT' (Part Number PT9876) has a unit price of \$15.49 in blue text, and the extension is \$15.00. The 'Subtotal' is now \$375.00.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	1 GALLON PAINT - BASE 1	EACH	10 \$ 28.00	\$ 280.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	28.00			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH	EACH	\$ 7.49	\$ 74.90
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT9876	PAINT TRAY KIT	EACH	\$ 15.00	\$ 15.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT9876	15.49			
Subtotal \$							375.00

Invoice/Quote menu: Search Invoice / Quote

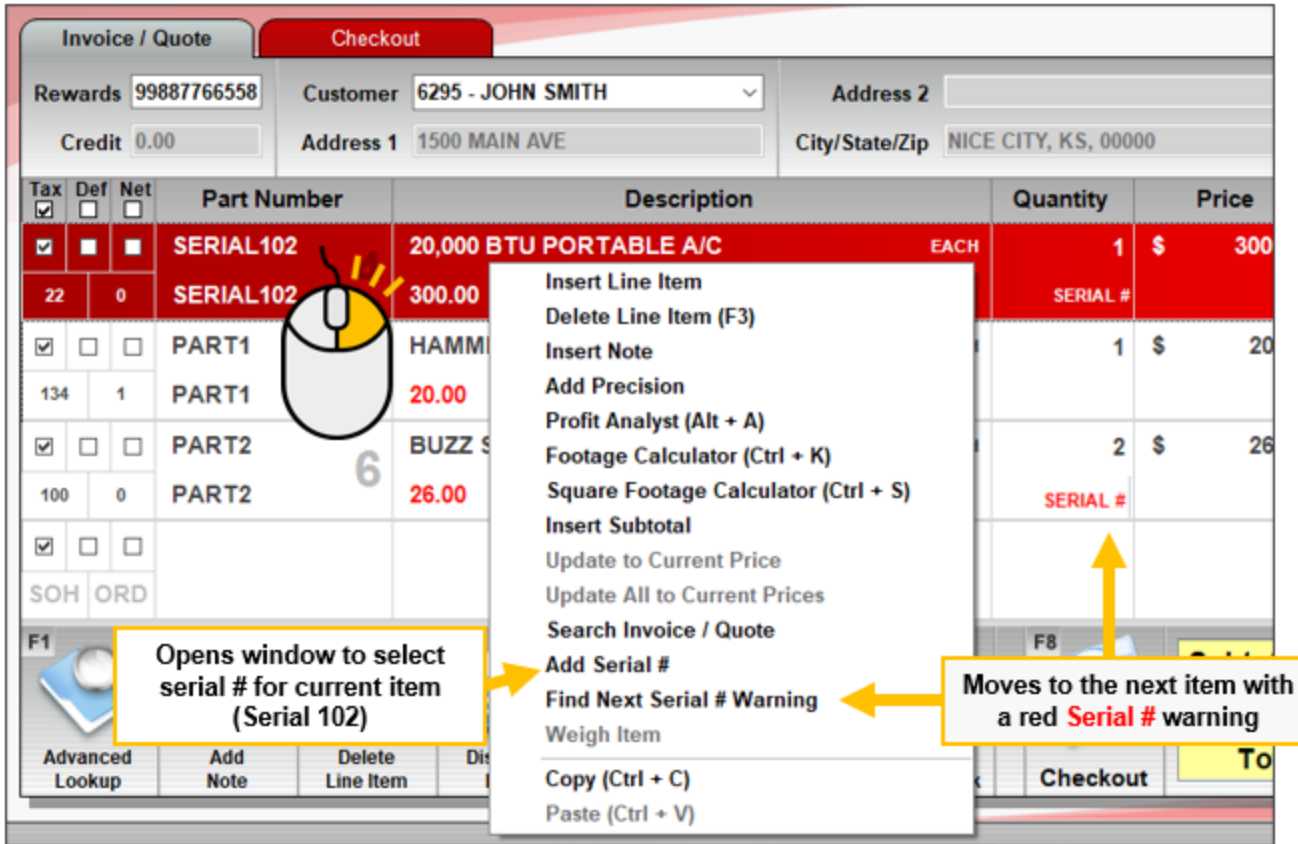


The screenshot shows the 'Invoice / Quote' menu with the 'Checkout' tab selected. A 'Search Invoice / Quote' dialog box is open, displaying the text 'caulk' in the search field. A yellow arrow points from the 'F9 Find Next' button in the dialog box to the 'Search Invoice / Quote' option in the context menu. The context menu also includes options like 'Insert Line Item', 'Delete Line Item (F3)', 'Insert Note', 'Add Precision', 'Profit Analyst (Alt + A)', 'Footage Calculator (Ctrl + K)', 'Square Footage Calculator (Ctrl + S)', 'Insert Subtotal', 'Update to Current Price', 'Update All to Current Prices', 'Add Serial #', 'Find Next Serial # Warning', 'Weigh Item', 'Insert Dynamic Kit Group', 'Tax Holiday (Ctrl + T)', 'Copy (Ctrl + C)', and 'Paste (Ctrl + V)'.

Tax	Def	Net	Part Number	Description	Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12345	Hammer	2.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	56789	Paint Base 1	5.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45678	Base 2	11.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	98765	3" Paint Brush	20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	65432	Paint Tray	2.50

- Select **Search Invoice / Quote** to search for search for a part number, description or invoice note.
- Enter a keyword or phrase.
- Press F3 or click **Find Next** to search the invoice.
- Keyboard shortcut: Ctrl + F

Invoice/Quote menu: Serialization options



The screenshot shows the 'Invoice / Quote' window with a 'Checkout' tab. The 'Customer' is '6295 - JOHN SMITH' and the 'Address 1' is '1500 MAIN AVE'. The 'City/State/Zip' is 'NICE CITY, KS, 00000'. The 'Rewards' number is '99887766558' and the 'Credit' is '0.00'.

Tax	Def	Net	Part Number	Description	Quantity	Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	1	\$ 300.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102			300.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART1	HAMM	1	\$ 20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART1			20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	BUZZ S	2	\$ 26.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2			26.00

The context menu is open over the 'SERIAL102' item. The options are:

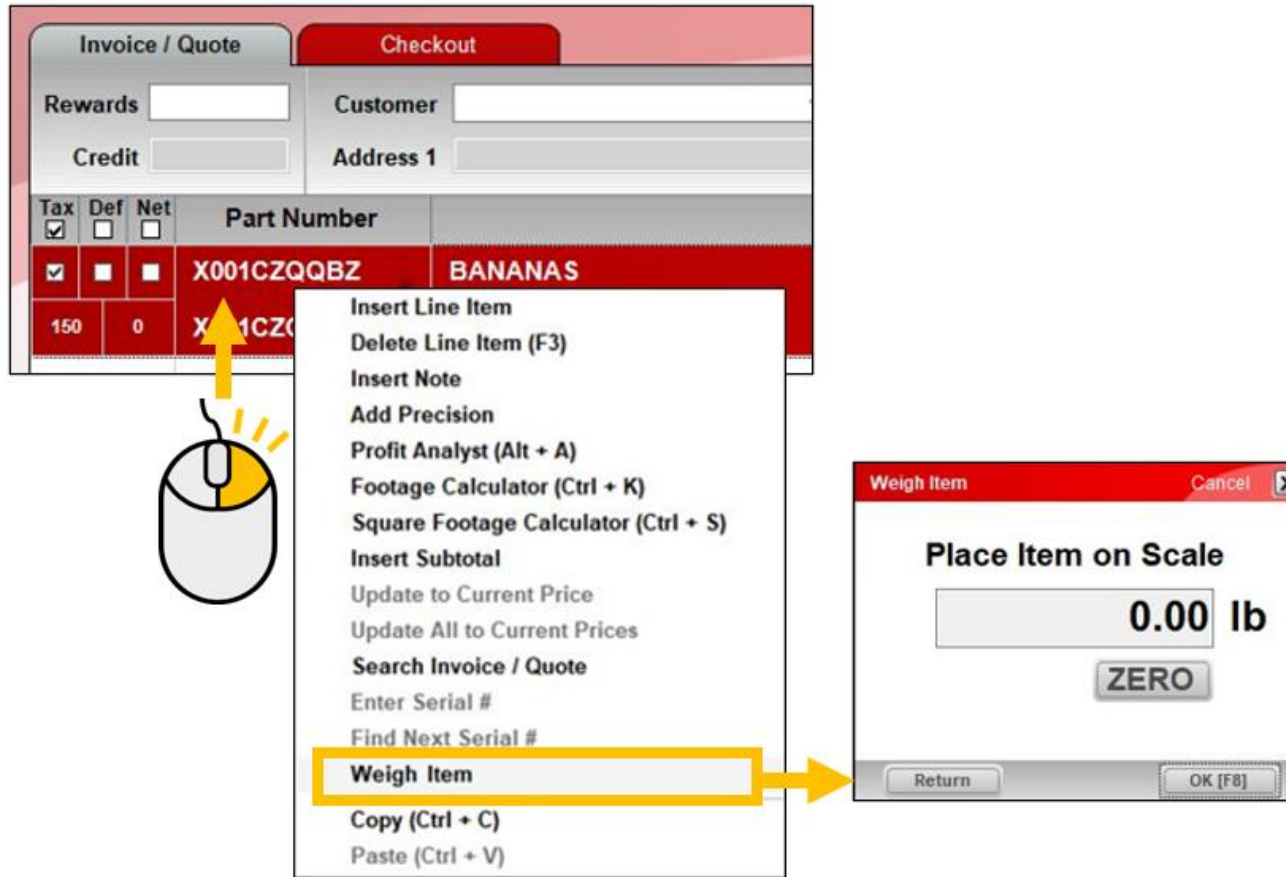
- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Copy (Ctrl + C)
- Paste (Ctrl + V)

Annotations:

- Add Serial #:** Opens window to select serial # for current item (Serial 102)
- Find Next Serial # Warning:** Moves to the next item with a red Serial # warning

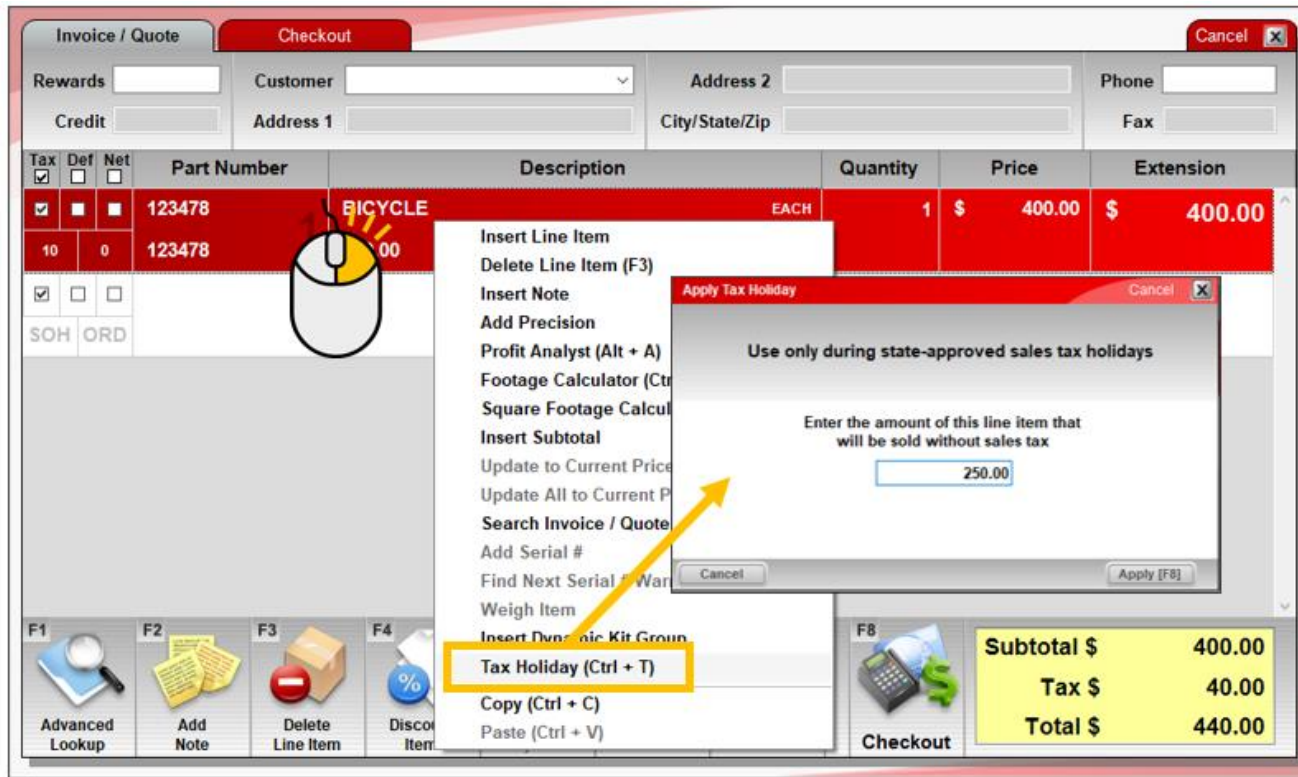
- Select **Add Serial #** to select or add a serial number for a serialized item.
- Select **Find Next Serial #** to search through items that require serial #'s.
- Serialization feature must be turned on.

Invoice/Quote menu: Weigh Item



- Select **Weigh Item** to initiate weighing an item on a supported scale.

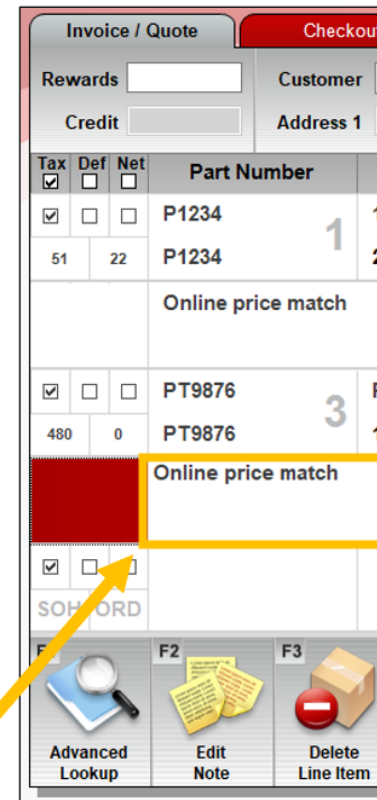
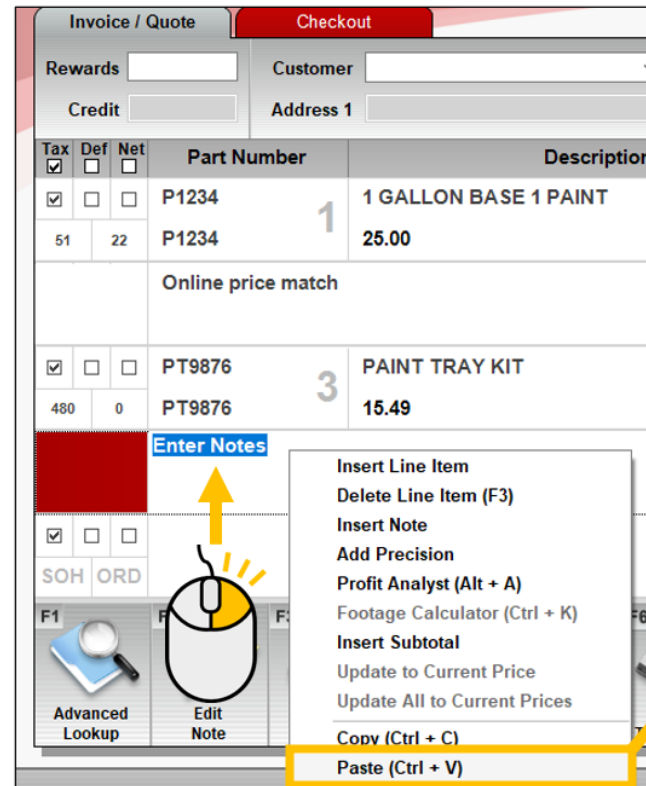
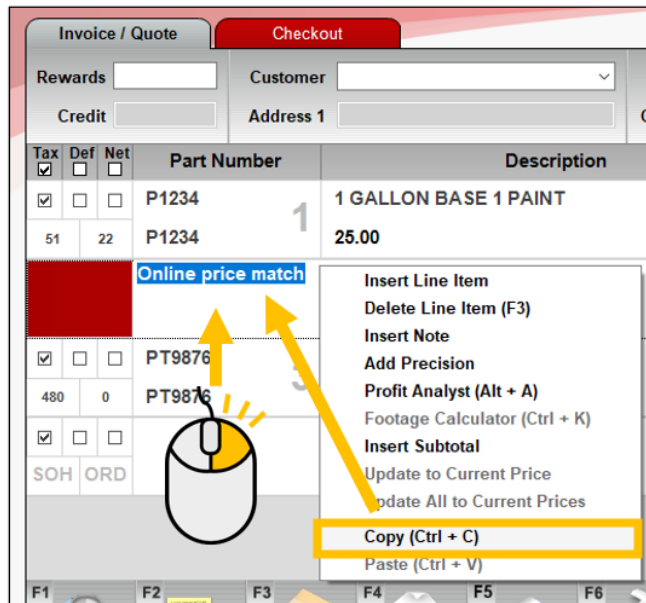
Invoice/Quote menu: Tax Holiday



- Select **Tax Holiday** to apply a sales tax holiday discount to an item.
- Tax Holiday feature must be turned on.
- Keyboard shortcut: Ctrl + T

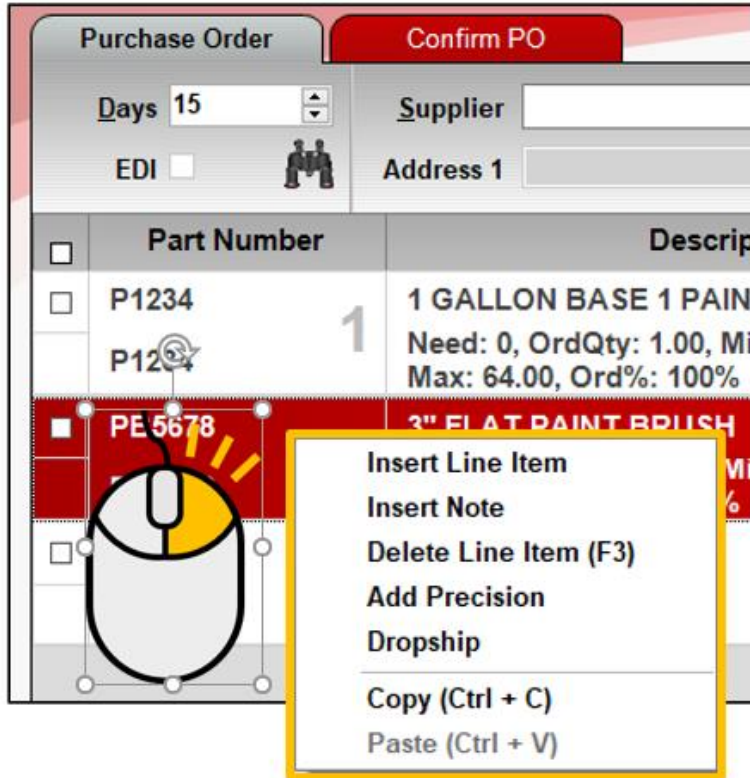
Invoice/Quote menu: Tax Holiday

Invoice Quote and PO menus: Copy and Paste



- Select **Copy** and **Paste** to duplicate editable line-item values, such as note text or a price
- Example shows how to copy and paste note text.
- Available in all three menus.
- Keyboard shortcuts: Ctrl + C, Ctrl + V

Create PO menu

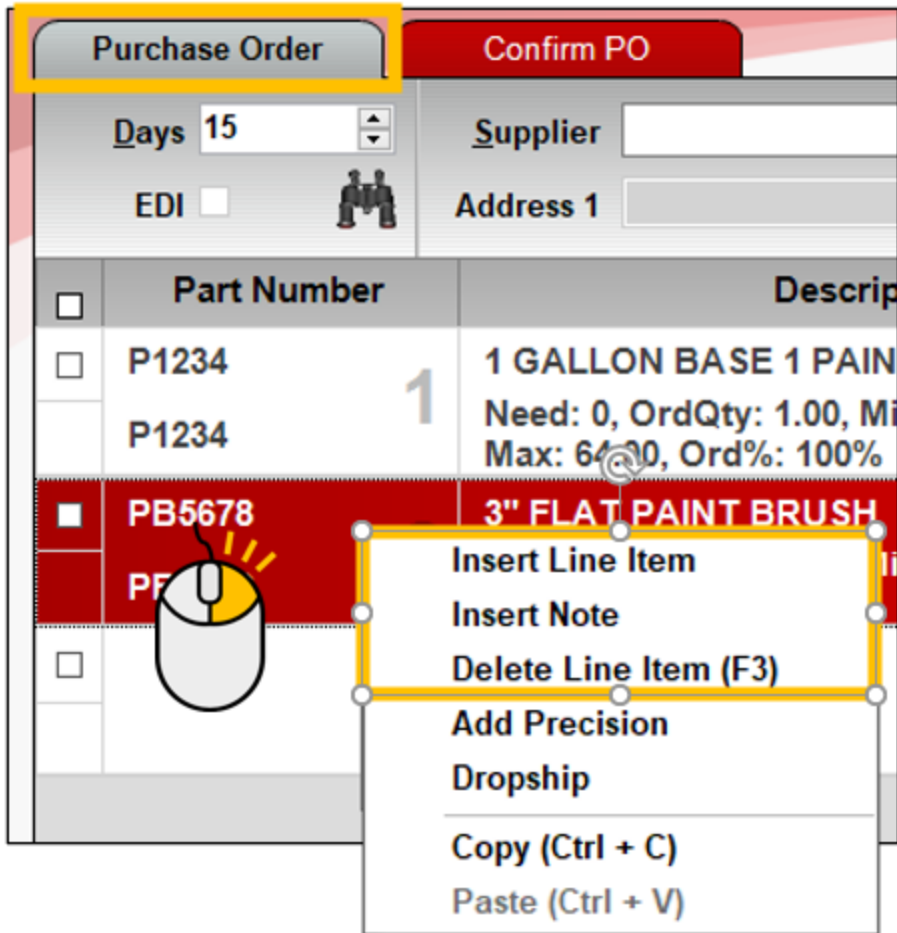


Part Number	Description
P1234	1 GALLON BASE 1 PAINT
P1234	Need: 0, OrdQty: 1.00, Mi
PE 5678	3" FLAT PAINT BRUSH

- When you create a PO, menu options include:
 - Basic line editing
 - Higher precision costs and quantities
 - Copy and Paste

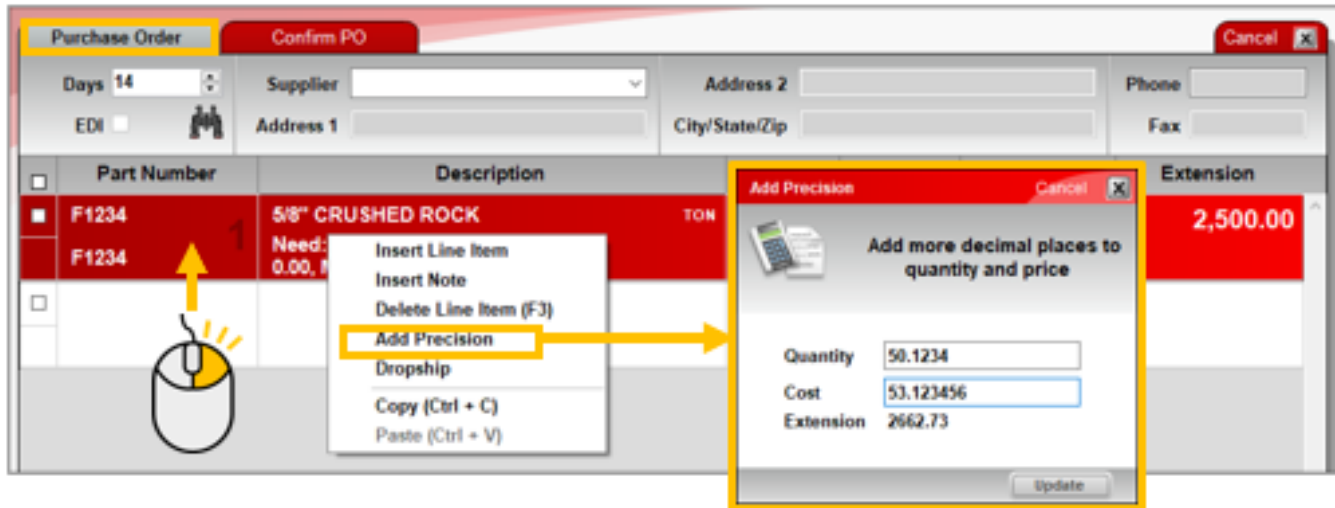
Note: Dropship is not currently available

Create PO menu: Line item edit commands



- Select **Insert Line Item** to add new line item above the selected line item.
- Select **Insert Note** to add a note above the current line item.
- Select **Delete Line Item** to remove the selected line item.
 - Keyboard shortcut: F3 (Same as **Delete Line Item** on the bottom ribbon).

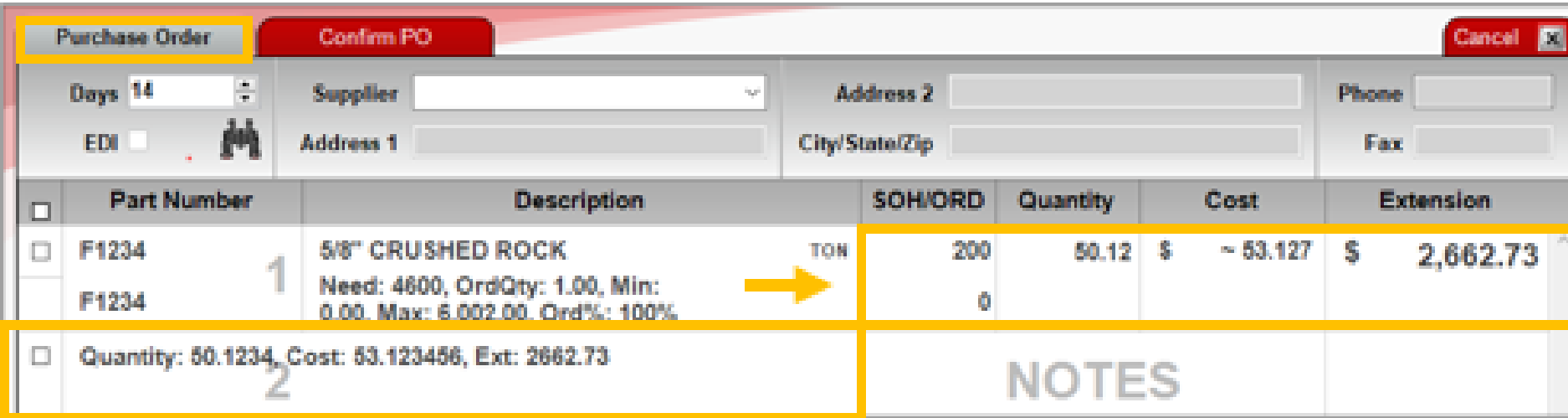
Create PO menu: Add Precision



- Select **Add Precision** to enter more precise **Quantity** and **Cost**
 - Quantity: Up to 4 decimal places
 - Price: Up to 6 decimal places
- Use for items that do not come in whole quantities, such as grains, seed, and gravel.
- As you adjust the **Quantity** and **Price**, a real-time **Extension** value is calculated.
- Click **Update** to adjust the line item.

Create PO: Add Precision

- The **Quantity**, **Price** and **Extension** are updated to two-decimal places.
- Full values are documented in a note below.



The screenshot shows a 'Purchase Order' form with a 'Confirm PO' button. The form includes fields for Days (14), Supplier, Address 1, Address 2, City/State/Zip, Phone, and Fax. Below these is a table with columns: Part Number, Description, SOH/ORD, Quantity, Cost, and Extension. A line item is shown for Part Number F1234, Description 5/8" CRUSHED ROCK, with a quantity of 50.12 and a cost of ~ 53.127. The extension is 2,662.73. A yellow arrow points to the extension value. Below the table is a 'NOTES' section with a yellow arrow pointing to it. The note contains the text: 'Quantity: 50.1234, Cost: 53.123456, Ext: 2662.73'.

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
F1234	5/8" CRUSHED ROCK	200	50.12	\$ ~ 53.127	\$ 2,662.73
F1234	Need: 4600, OrdQty: 1.00, Min: 0.00, Max: 6.002.00, Ord%: 100%	0			

Quantity: 50.1234, Cost: 53.123456, Ext: 2662.73

NOTES

Tip The line item **Cost** may appear as an approximate value shown with a tilde (~). The value may be slightly different than the price you entered. This variation is expected. The additional precision is always maintained in the line item **Extension**.

Receive PO menu



Receive PO **Confirm Receive**

PO # 12345 Supplier 2 - MY SUPPLIER

EDI ☐ Address 1 123 Hardware Supplies Lane

Del	Part Number	Description
<input type="checkbox"/>	PART1	HAMMER
<input type="checkbox"/>	PART1	Old Cost: \$10.000 Old Sell: \$31.00 M Ref Mar: 00% New Sell: \$31.00 M
<input checked="" type="checkbox"/>	P1234	1 GALLON BASE 1 PAINT
<input type="checkbox"/>		
<input type="checkbox"/>		

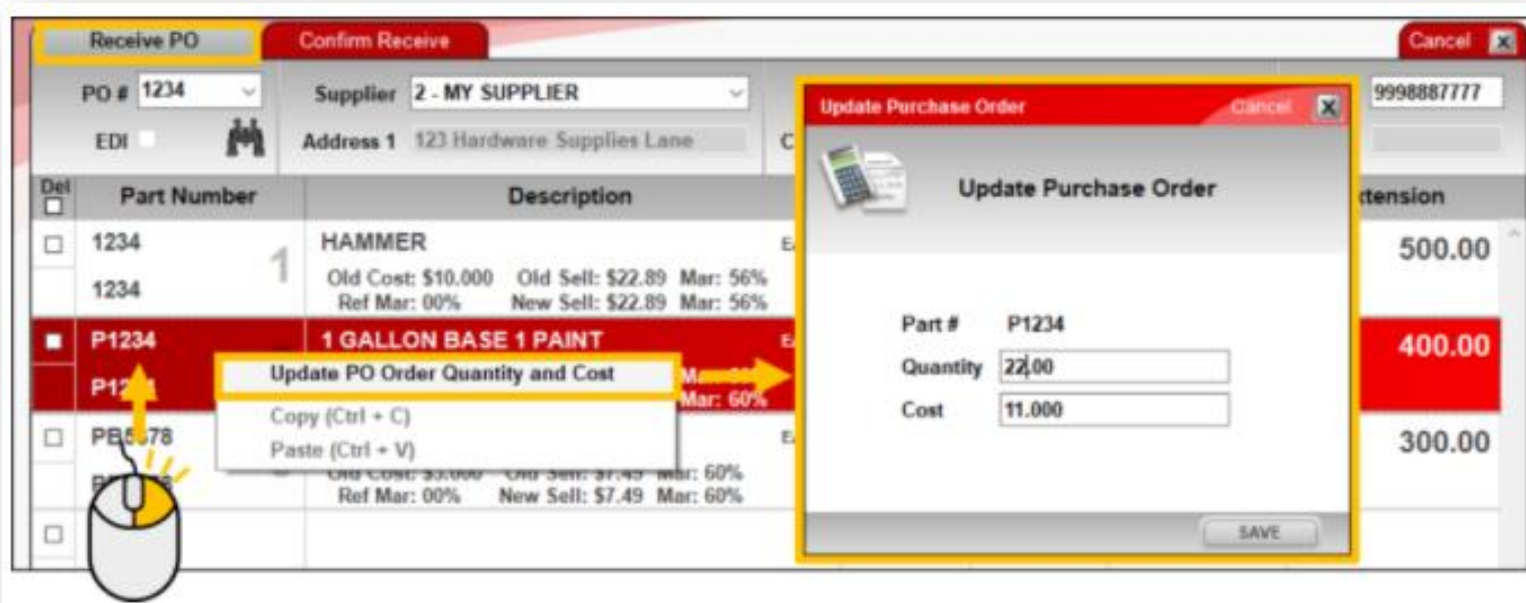
Update PO Order Quantity and Cost
Add Serial #
Find Next Serial # Warning

Copy (Ctrl + C)
Paste (Ctrl + V)

- When you receive a PO, menu options include:
 - Update order quantity and cost values
 - Add serial #'s for serialized items
 - Copy and Paste

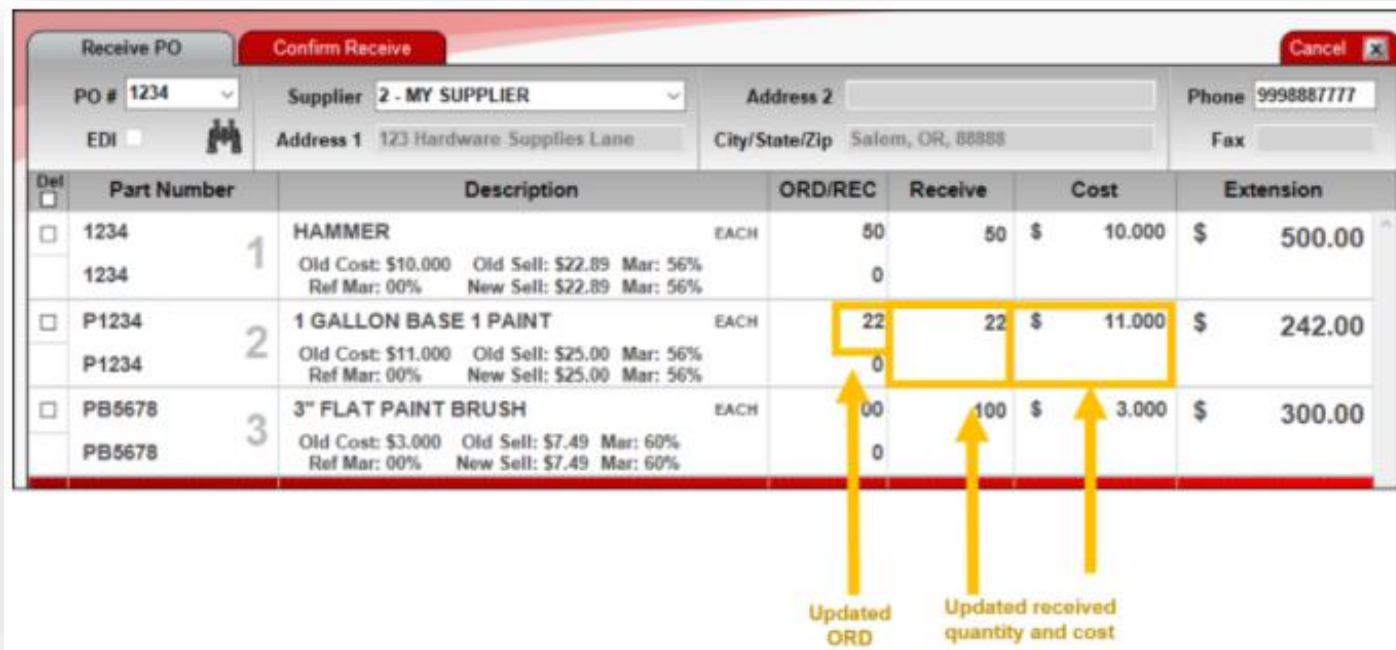
Receive PO menu: Update PO Order Quantity and Cost

- Select **Update PO Order Quantity and Cost** to change an item's order quantity and cost without receiving the purchase order (clicking **Process**).
- Click **SAVE** to apply the updates.



Receive PO: Update PO Order Quantity and Cost

- When you **SAVE** your changes, the line item's **ORD** (ordered quantity), **Receive** (received quantity) and **Cost** values are updated.
 - Note: An updated PO is not sent to the supplier.



Receive PO Confirm Receive Cancel

PO # 1234 Supplier 2 - MY SUPPLIER Address 2 Phone 9998887777

EDI Address 1 123 Hardware Supplies Lane City/State/Zip Salem, OR, 88888 Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	1234 1	HAMMER Old Cost: \$10.000 Old Sell: \$22.89 Mar: 56% Ref Mar: 00% New Sell: \$22.89 Mar: 56%	50 0	50	\$ 10.000	\$ 500.00
<input type="checkbox"/>	P1234 2	1 GALLON BASE 1 PAINT Old Cost: \$11.000 Old Sell: \$25.00 Mar: 56% Ref Mar: 00% New Sell: \$25.00 Mar: 56%	22 0	22	\$ 11.000	\$ 242.00
<input type="checkbox"/>	PB5678 3	3" FLAT PAINT BRUSH Old Cost: \$3.000 Old Sell: \$7.49 Mar: 60% Ref Mar: 00% New Sell: \$7.49 Mar: 60%	100 0	100	\$ 3.000	\$ 300.00

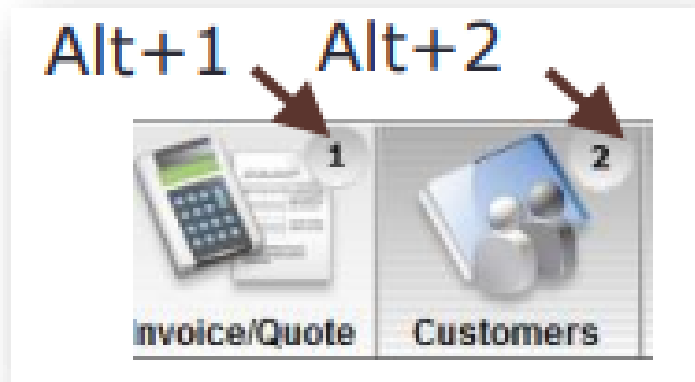
Updated ORD

Updated received quantity and cost

- Select **Add Serial #** to enter serial numbers for a received items.
- Select **Find Next Serial #** to search through items that require serial #'s.
- Serialization feature must be turned on.

Paladin Quick Keys

Paladin Quick Keys



- **Alt + <#>**: 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.

Paladin Quick Keys



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

Paladin Quick Keys

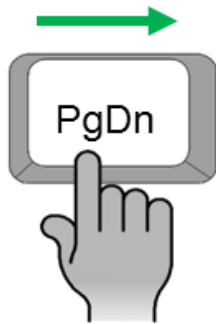
- **F<#>**: Press a function key instead of clicking a button on the bottom ribbon when specified in the user interface.

Keyboard shortcut examples for buttons

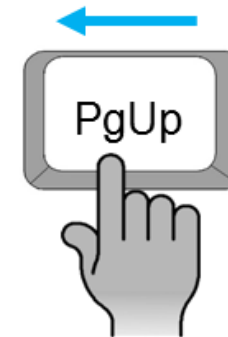
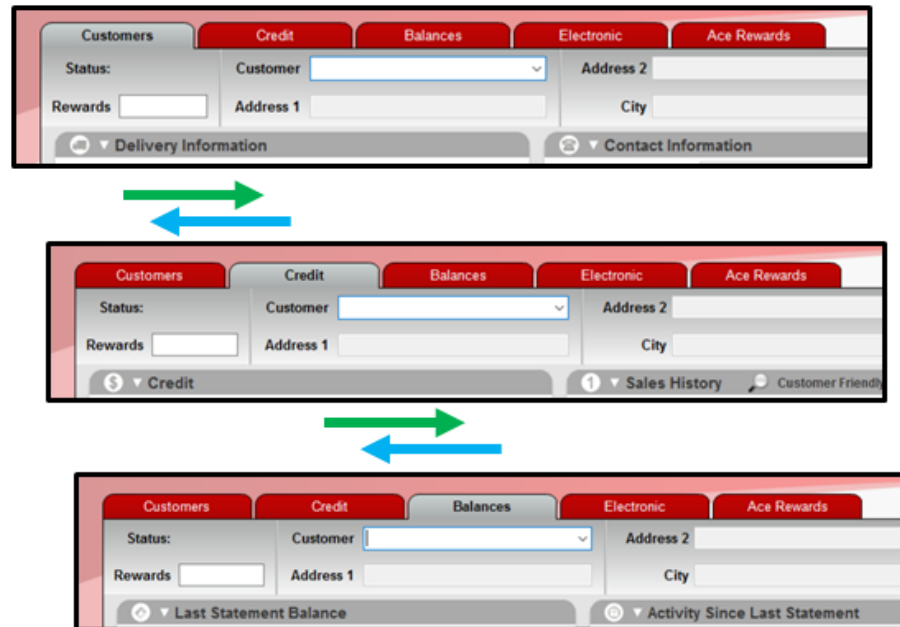


Paladin Quick Keys

Page Up & Page Down: Move sequentially from one tab to the next in any module (except **Reports**), using the **Page Up (PgUp)** and **Page Down (PgDn)** keys



Use the **PgDn** key to move between tabs to the right



Use the **PgUp** key to move between tabs to the left

Windows Quick Keys

Windows Quick Keys



- **Alt + Tab:** Displays a window that shows all open programs.
- Hold the **Alt** key, press the **Tab** key to cycle through programs.
- **Windows key + Up arrow:** Displays a window in full-screen mode.

More efficiency tips

Access a customer's purchase history

Inventory Customer History Special Order

Customer: JAMES SMITH ☒ Invoice ☐ Part ☐ Part + Customer ☐ Invoice Reprint

Invoice All Invoices... Find >>

Qty	Part Number	Description	Invoice #	Price Sold
0.00	6351522	PVC CEMENT LVOC RAIN-R-S...	124210	\$5.87
0.00	1000	FASTENERS	124027	\$0.51
0.00	038753435855	CLOSET FLANGE PVC SPIGO...	124027	\$4.50
0.00	078864010053	WAX RING-FLANGE TOILET	124027	\$2.34
0.00	038753436517	CLOSET FLANGE PVC 4IN	124027	\$19.59
0.00	076335192673	TOILET BOLT SET 5/16X2-1/4 B	124027	\$4.50
0.00	076308004880	MAT FIBERGLASS 8 SQ FT	120308	\$6.36

1. Open the **Invoice/Quote** module.
2. Select the customer.
3. Press F1 to open **Advanced Lookup**.
4. Click the **History** tab.
5. Select **Invoice** and then click **Find>>**.

A list of purchased items appears.

Use the customer purchase history

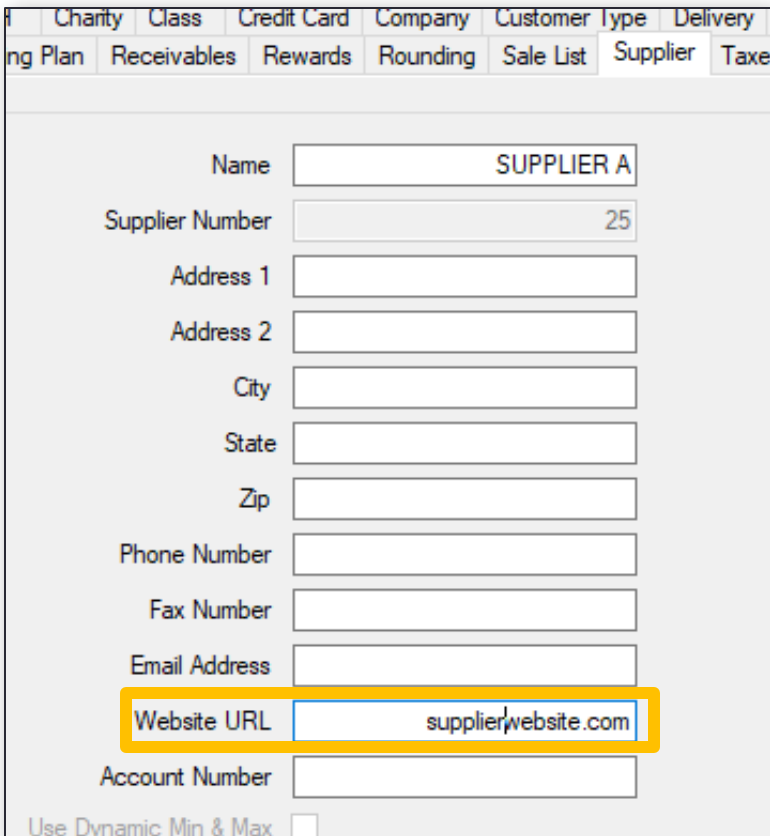
Qty	Part Number	
-1.00	6351522	PVC CEM
0.00	1000	FASTENE
0.00	038753435855	CLOSET
0.00	078864010053	WAX RING
0.00	038753436517	CLOSET
0.00	076335192673	TOILET B
0.00	076308004880	MAT FIBE
-1.00	076308004019	RESIN JE
0.00	038613123052	220871 SO
Recent History Double-click a row for more detailed tra		



Date Sold	SOH	Price
05-Aug-17	27.00	\$4.59
03-Aug-17	-12,559...	\$0.00
03-Aug-17	4.00	\$4.59
03-Aug-17	8.00	\$2.39
03-Aug-17	1.00	\$19.99
03-Aug-17	5.00	\$4.79
24-Jun-17	1.00	\$6.49
24-Jun-17	1.00	\$13.99
12-Apr-17	10.00	\$1.99
<div>Report Summary</div> <div>Report Detail</div> <div>F8 Add Items to Invoice</div>		

- To add or return item(s) to the invoice, enter a positive or negative quantity (**Qty**) value for any item 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.

Specify a vendor's website for access in Advanced Lookup



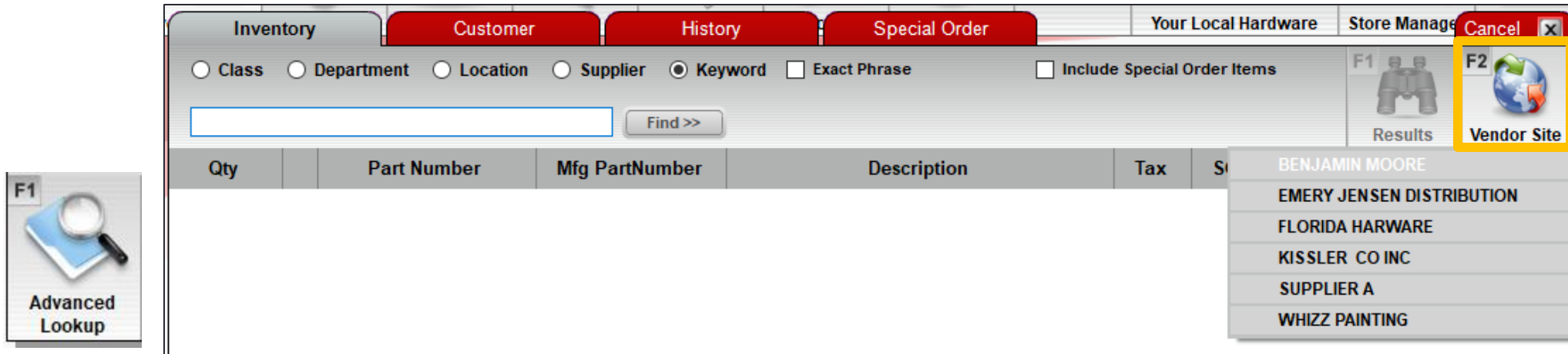
The screenshot shows the 'Supplier' configuration window in the Paladin software. The 'Supplier' tab is selected. The 'Name' field contains 'SUPPLIER A' and the 'Supplier Number' field contains '25'. The 'Website URL' field is highlighted with a yellow box and contains the text 'supplierwebsite.com'. Other fields include 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Phone Number', 'Fax Number', 'Email Address', and 'Account Number'. At the bottom, there is a checkbox for 'Use Dynamic Min & Max'.

Set the website URL in Paladin Configuration:

1. On the **File** menu, click **Setup**.
2. Click the **Supplier** tab.
3. In the **Suppliers** pane, select the vendor and enter the vendor's website address in the **Website URL** box.
4. Save your changes.
5. Restart Paladin.

Access a vendor's website

1. Press F1 to open **Advanced Lookup**.
2. Press F2 and select from the list of vendor websites.
3. Website will open in a separate browser window.

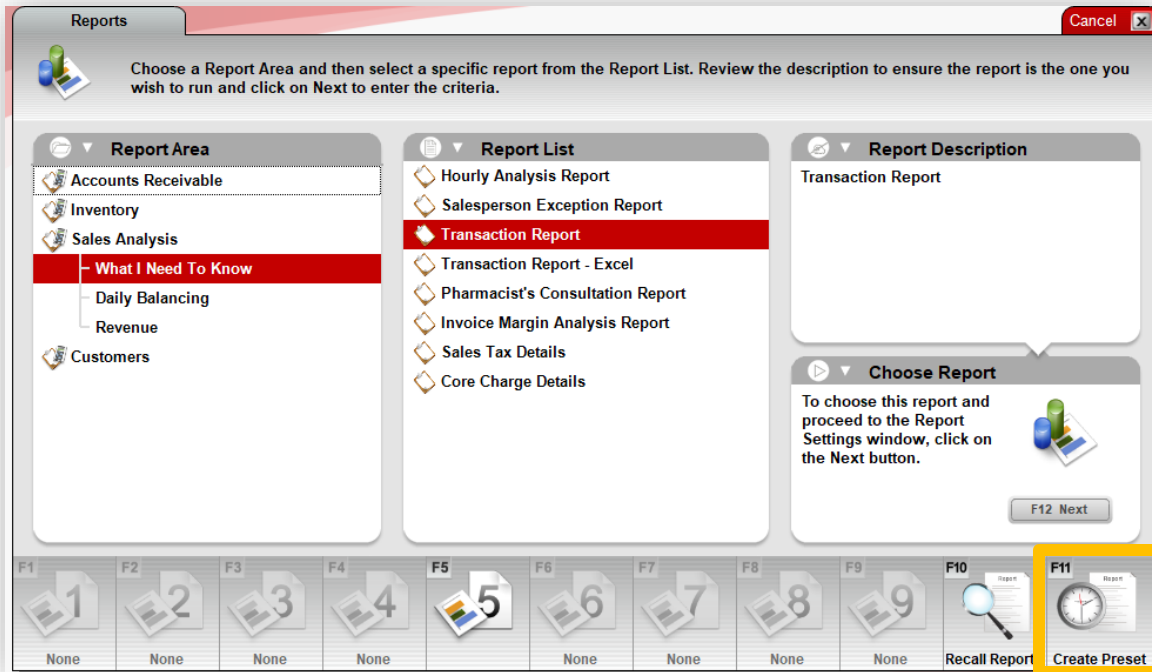


Available in Invoice/Quote, PO and Inventory modules.

Create a preset report

To create a preset report that you can run with one click or schedule:

1. In the **Reports** module, select the report name. Don't press F12 or click **Next**.
2. Press F11 or click **Create Preset**.
 - If the report already is already assigned to a function key, the **Edit Preset** option will appear as F11 instead.
3. Select the F<#> key to assign to the report.
4. Optional: Enter a button name and/or select a schedule.
5. Press F12 and define your report settings.
6. Press F12 to save the preset report.



Learn more

To learn more, see these articles:

- [Overview: Quick-access \(right-click\) menu in the Invoice/Quote module](#)
- [Overview: PO Quick Access \(right-click\) menu in the PO module](#)
- [How to insert subtotals on an invoice](#)
- [About the footage calculators](#)
- [Overview: Serialization: Managing products with serial numbers](#)
- [Tax Holiday User's Guide](#)
- [About keyboard shortcuts in Paladin](#)
- [Keyboard shortcuts in Windows](#)

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