Maximize Productivity with the Advanced Lookup Feature

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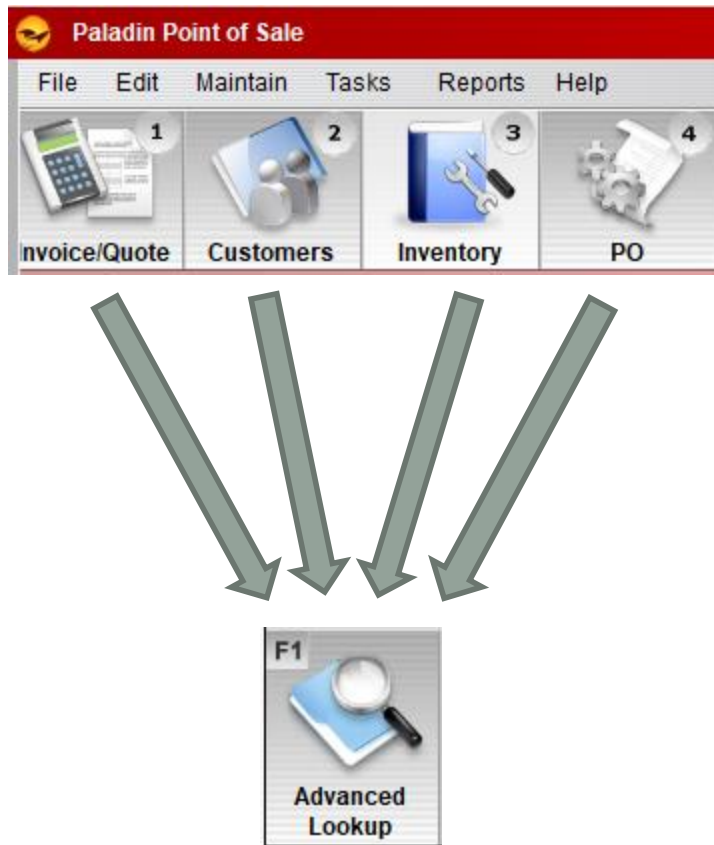
Client Experience Manager

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WHAT YOU'LL LEARN

- Navigating to and through advanced lookup
- Advanced lookup search options by module
- Display and sorting options using advanced lookup
- How advanced lookup works
- The power of advanced lookup in Invoicing
- Setting default navigation options
- Tricks and tips to get the results you desire
- Setting up department, class and location for further refining search results

Navigating to and through Advanced Lookup

- Press **F1** for quick search
- The following modules include the advanced lookup feature:
  - Invoice/Quote
  - Customers
  - Inventory
  - Purchase Order

Advanced lookup search options by module

Search:
- Inventory
  - By Class
  - By Department
  - By Location
  - By Supplier
  - By Keyword
- Customers
  - By Name
  - By Account Number
  - By Address
  - By Phone Number
  - By Rewards Number
  - By All
- History
  - By Invoice Number
  - By Part Number
  - By Part Number for customer
- Vendor Site

Search:
- Customers
  - By Name
  - By Account Number
  - By Address
  - By Phone Number
  - By Rewards Number
  - By All

Search:
- Inventory
  - By Class
  - By Department
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Search:
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Display and sort options using advanced lookup

Inventory

Qty		Part Number	Mfg PartNumber	Description	Tax	SOH	ORD	Qty Price Break

Customer

Status	Chg	Customer	Reward #	Account #	Address	City	State	Zip

Invoice

Store	Date	Acct Name	Acct #	Employee	Term.	Inv #	PO #	Total

Purchase Orders

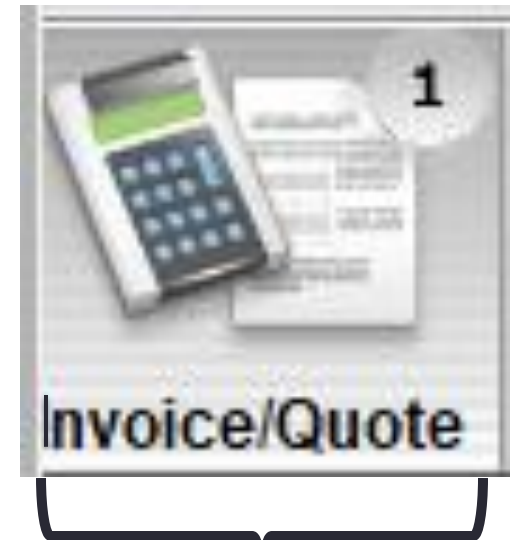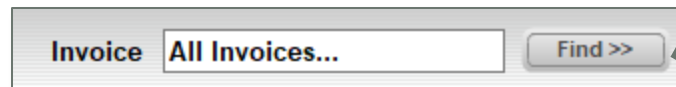| Qty	Part Number	Mfg PartNumber	Description	SOH	ORD	Last Cost

How advanced lookup works

- Pressing **F1** – immediately takes you to the advanced lookup options.

- Start typing or select desired search criteria and type request.

- When your item is found either press **F8,** click the button in the bottom right corner, or double click on the line to select the item.

- When searching inventory in Invoicing, enter amount (positive or negative) press **Enter**, then press **F8** to add to invoice.
  [Note: it is possible to add quantities to more than one item in the current search results]

The power of advanced lookup in Invoicing

- Enhanced search options within the History tab:

  - Best practice for returns & credits

  - Investigating historical purchases

  - Customer/Item specific historical reporting

  - Search specific customer invoice numbers or display "All Invoices…" by pressing the **Find>>** button

  - Part number searches

  - Invoice reprints – Either to a PDF document or the default receipt printer

Invoice | All Invoices... | Find >>

Invoice/Quote

F1

Advanced Lookup

Setting default navigation options

- File > Setup > Company tab > Advanced Lookup section:

Tricks and tips to get the results you desire

- Type less text for more search results; Type more text for less search results

- Use the "**Results; F1**" key to further refine the search results

- Add website address to Suppliers tab in setup to search vendor sites from within the application frame. Example: http://paladinpos.com

- Double click on historical invoices to generate invoice reprints from the Invoice module.

- Set reprints above to print on original receipt paper or on the screen as PDF. Go to File > Setup > Invoice(Store) > Use Receipt Printer for Invoice Reprint.

Setting up department, class and location for further refining search results

• Searching by department, class or location can help you to zero in on your target item.

• Classes and subclasses can help to group "like" products together.

• Paladin allows for up to three classes and subclasses.

• If you use and know your location codes, you can reduce your search results to a few dozen items or less.

• When search results are returned, you can press "**Results**; **F1**" to further refine your search results.

UNIVERSITY

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