



FREE ADVANCED TRAINING



Unlock Your Business PotentialWith Our Newest LBM Features

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- LBM feature review
- Learn more



Reviewing LBM features

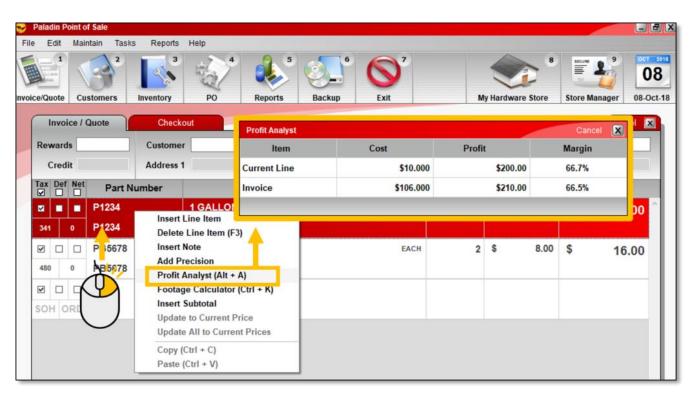
- *Profit analyst (view invoice cost, profit, & margin when building quotes/invoices)
- *Footage (Tally) Calculator
- >*Subtotals on quotes/invoices
- *Up to 6 decimal point fractions (price/qty)
- *Insert items & notes anywhere on quote
- *Auto-update prices on quotes
- >MBF/MSF/TON inventory/PO conversions
- >Stored quotes / orders / on holds
- Convert quotes into orders (sell partial order)
- >Hide itemized invoice pricing on quotes

- >Special orders (newly revised)
- > Projects/job tracking & reporting
- >Authorized signers verification
- > Yard order forms
- > Delivery order forms
- ➤ Mobile2DeliverTM & Scheduler
- ➤ Mobile 2 Checkout TM mobile app
- >Custom discounts & pricing plans
- >Minimum margin protection
- >Accounts receivables





*Profit analyst

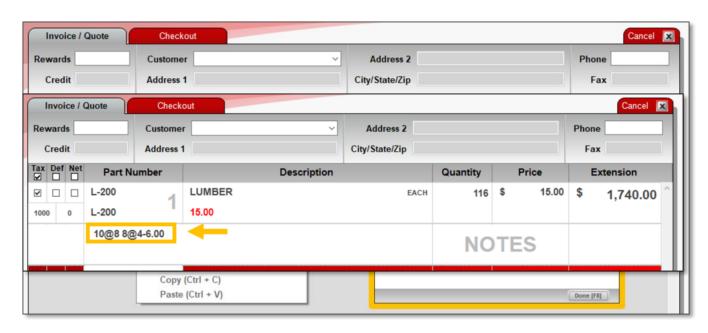


- The Profit Analyst gives you the competitive edge when generating customer quotes.
- View invoice cost, profit, & margin when building quotes/invoices.
- Customize retail prices while maintaining your profitability.
- Employee permissions limit access to this powerful feature.
- Access with Alt-A key combination or right-mouse click.





*Footage calculator

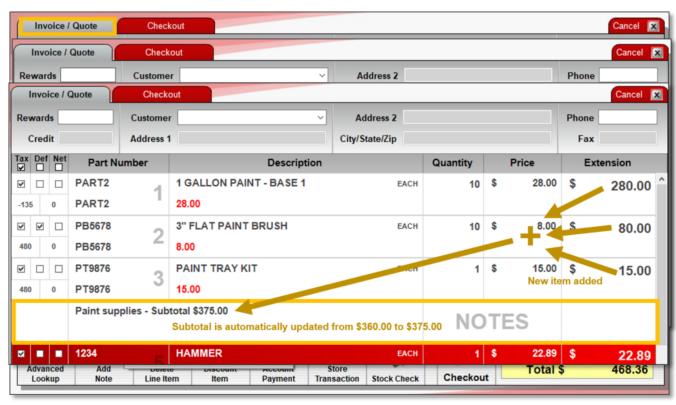


- The Footage Calculator lets you create a tally of items by defining pieces with different lengths (feet and inches).
- This feature is useful when you sell items in multiple lengths, such as lumber and metal roofing.
- Access with CTRL-K key combination or right-mouse click.





* Subtotals on quotes/invoices

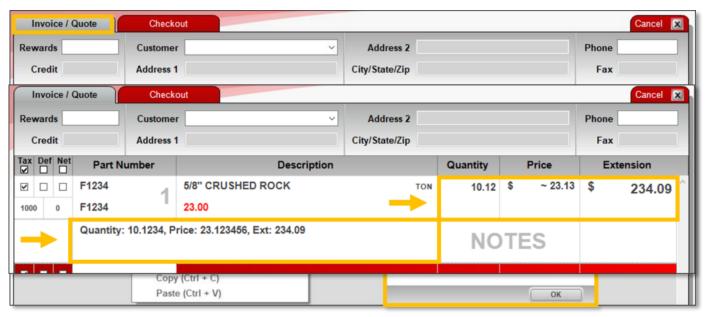


- Insert dynamic Subtotals throughout the invoice.
- A subtotal is inserted above the line item.
- The subtotal is calculated from the previous subtotal.
- Any price changes will be updated and reflected in the subtotal.





* Up to 6 decimal point fractions (price/qty)

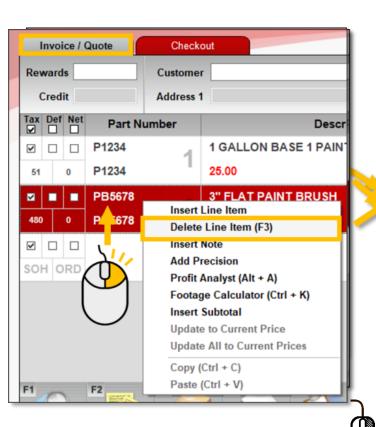


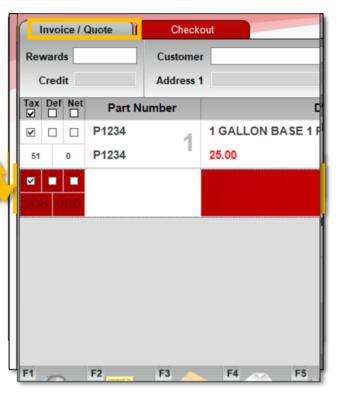
- Add more decimal places to invoice item quantities and prices.
- You can add additional precision to these line item values:
 - Quantity: Up to four decimal places
 - Price: Up to six decimal places
- A real-time Extension value is calculated as you adjust the Quantity and Price.





* Insert items & notes anywhere on quote



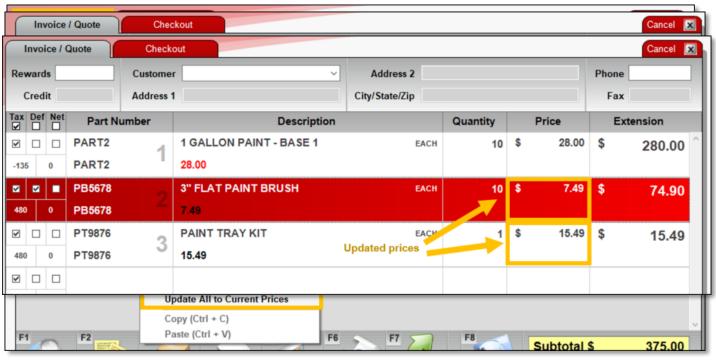


- Insert a line item or note anywhere on the invoice or purchase order.
- A new line item is inserted above the selected line.
- If you want to insert a note instead, select Insert Note.
- You can also select Delete Line
 Item

* Now available with right-click mouse feature



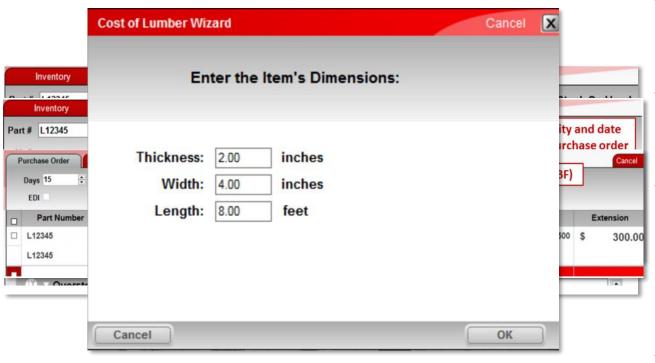
* Auto-update prices on quotes



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



Buy by MBF and sell by the stick



- Thousand board foot calculations can be factored into inventory.
- The stick cost is automatically calculated for you based on your MBF cost.
- The retail price can be changed automatically to reflect the new MBF cost when receiving purchase orders based on your desired margin.
- The per item cost and equivalent MBF cost, will appear when added to a PO.



Stored quotes / orders / on holds

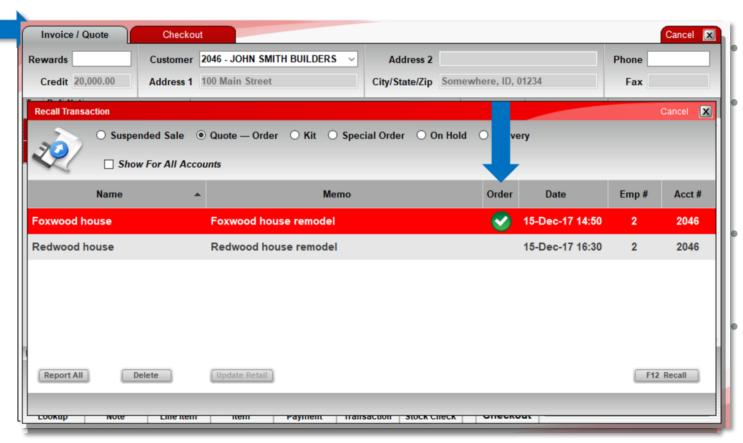


- Customer Stored Transactions window appears when you select a customer with stored quotes, orders, special orders or onhold items.
- This window is optional and configurable.





Convert quotes into orders (sell partial order)



Turn a quote into an order.

Recall the quote, and then, on the bottom ribbon, click **Order Manager** or press F5.

all items on the original quote will become order items.

An order item shows the original order amount and will track the number of items sold.

Order are identified with a symbol.



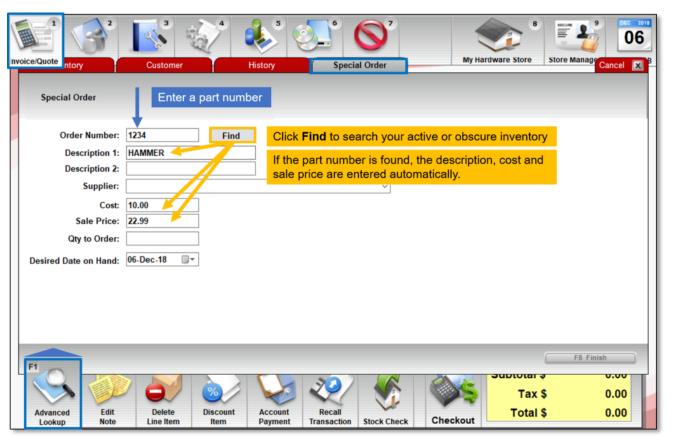
Hide itemized invoice pricing on quotes



- Print Unpriced Quote option will print a quote that omits prices or extensions for line-items.
- A total price is still included
- This may help to prevent price shopping your quotes.



Special orders ***new revised process***



- Search and find products in stock and in the catalogs.
- Auto-completes fields.
- Creates unique part numbers and will not affect ordering algorithms.
- New setting added to allow special order modifications.*

*activate in File/Setup/Company tab, Special Order section



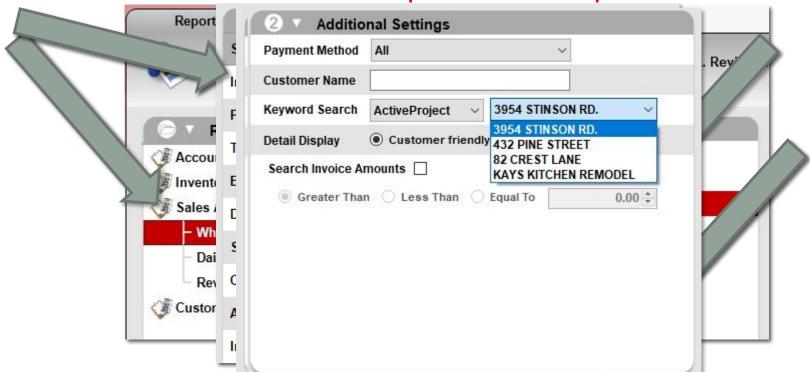
Contractor reports by project/job/address

- Produce invoice summary reports and output to MS Excel.
- Produce invoice detail reports and output to PDF.



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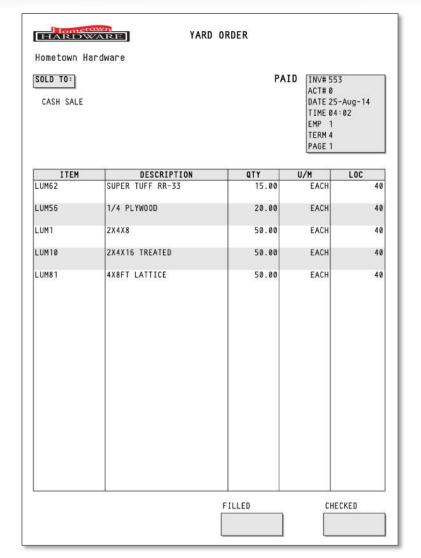


Authorized signers verification



- Add authorized signers on accounts.
- During checkout the signers are verified.
- Signer names are added to the invoice and receipt.
- This can be set as a required field.

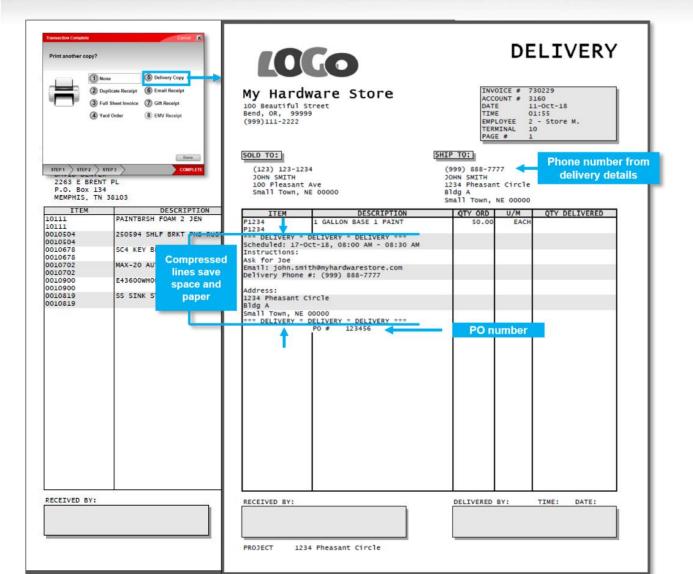




Yard order forms

- Print yard orders at the register or in the yard.
- Up to 4 different form sizes/types of forms to choose from.
 - ½ page
 - Full page
- Print from second tray in printer.
- Limit it to just yard order items or print the entire invoice.



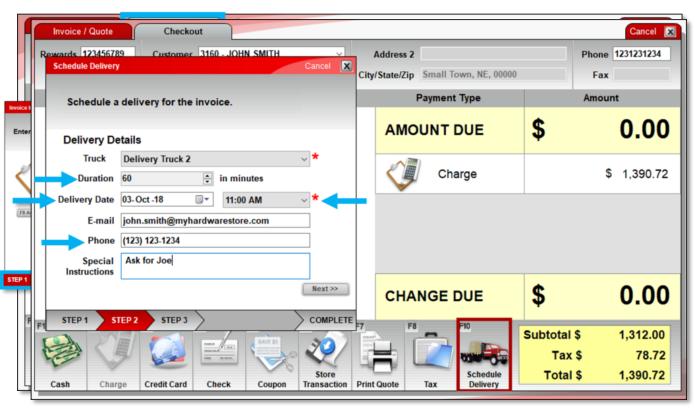


Delivery order forms

- Print hardcopy delivery form.
- Includes delivery schedule (If the delivery scheduler is used).
- Box for "Received by:" and "Delivered by:" with Date & Time.



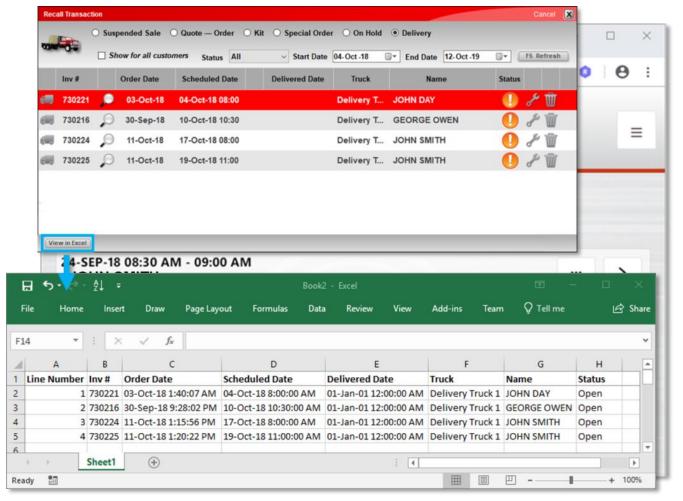
Mobile2Deliver – at checkout in the store



- Deliveries are initiated before payment is taken and scheduled after the payment is processed.
- Deliveries are scheduled in the payment wizard.
- Project information auto-fills delivery address values.
- Deliveries can be scheduled for a specific time window in addition to a date.

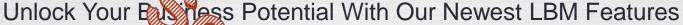


Mobile2Deliver – using mobile device in the field

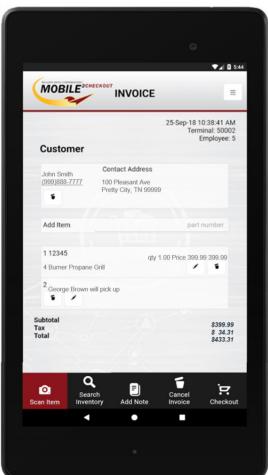


- You can attach the invoice to the customer's automated delivery notification email.
- View deliveries on the mobile device sorted by date and time
- Watch the status change as deliveries are made.
- View the delivery scheduler and detailed report.







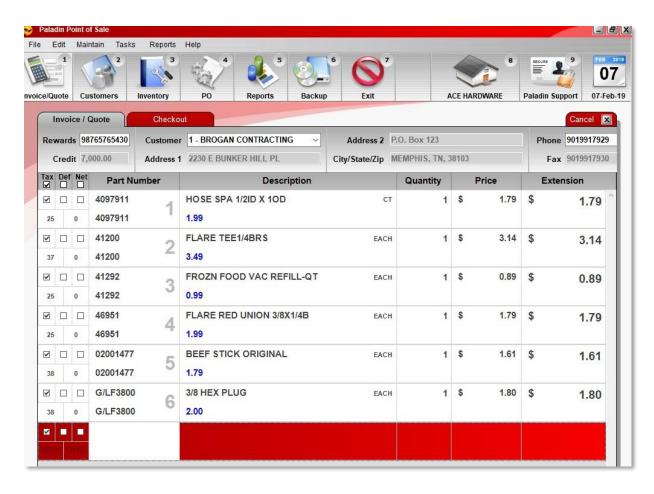


The Mobile yout app supports these familiar invoicing features:

- Add a customer to provide from your Paladin customer database
- Scan and add items to the vise using the camera on your device
- Search for and add items to the i voi from your Paladin inventory database
- Add items to the invoice manually by the modern
- Modify an invoice item's quantity and price
- Add invoice notes
- Calculate sales tax based on the store's sales tax setting
- Accept cash, credit card and charge payments
- Process item returns
- Store a transaction for later processing in Paladin Point of Sale
 - This feature is useful when you want create the invoice on a mobile device, and then apply pricing plans on a Paladin Point of sale terminal later. Pricing plan support is planned for a future Mobile2Checkout release.



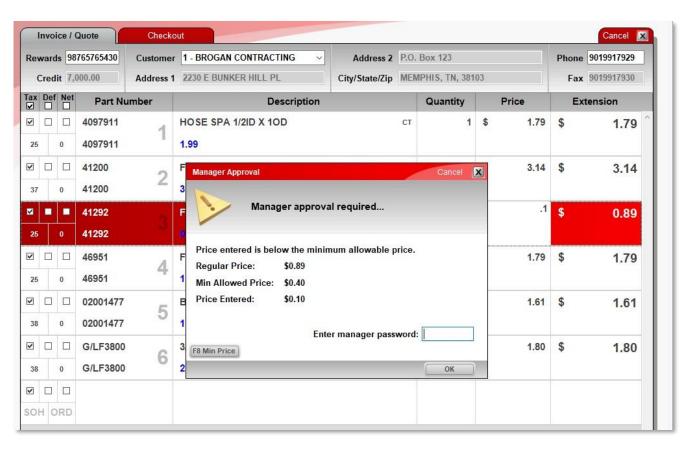
Custom discounts & pricing plans



- Create customized trade discounts.
- No more price haggling.
- Consistent prices are assured.
- Specialize pricing plans for specific trades.
- Cashier just needs to enter customer and the system automatically applies the proper discount.

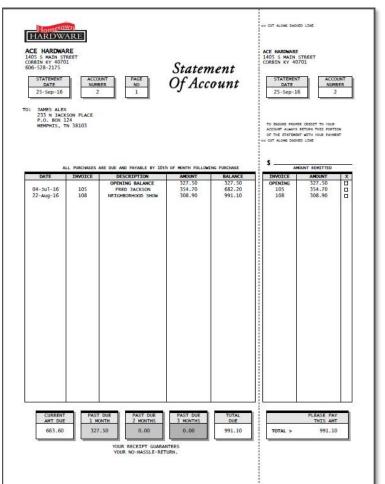


Minimum margin protection



- Eliminate selling items below profitable levels.
- Works on the following pricing scenarios:
 - Manual price changes at checkout
 - Using the F4 Discount button at checkout
 - During promotional sales
 - Applying loyalty points
 - Prompt payment discounts

Accounts Receivables



- Either generate statements to the printer or email them automatically to specific accounts.
- Include detailed transaction reports behind the statements.
- Ability to generate transaction reports by project/job.
- Tailor to each account for features like prompt payment discounts, service charges, past due hold, etc.



Learn more

To learn more, see the following WEBINARS in our Help Portal:

How to import inventory data into a Paladin Point of Sale database

Automating sales, promotions and trade discounts

How to view item inventory costs by MBF, MSF, or ton

How to add, edit, remove, or restore a customer project

Add descriptions to customer projects

How to create and select a new customer project at checkout

WEBINAR: Import/export inventory and access obscure inventory

WEBINAR: Special Orders made easy by using the Paladin SO process

WEBINAR: New Paladin feature: Mobile2Deliver

WEBINAR: Our delivery scheduling system just got a major upgrade

Search on
New
Features
splash
screen for
detailed
information

A recording of this webinar will be available at portal.paladinpos.com/webinars.





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