Paladin Helps Manage Customer Jobs

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August 16, 2022

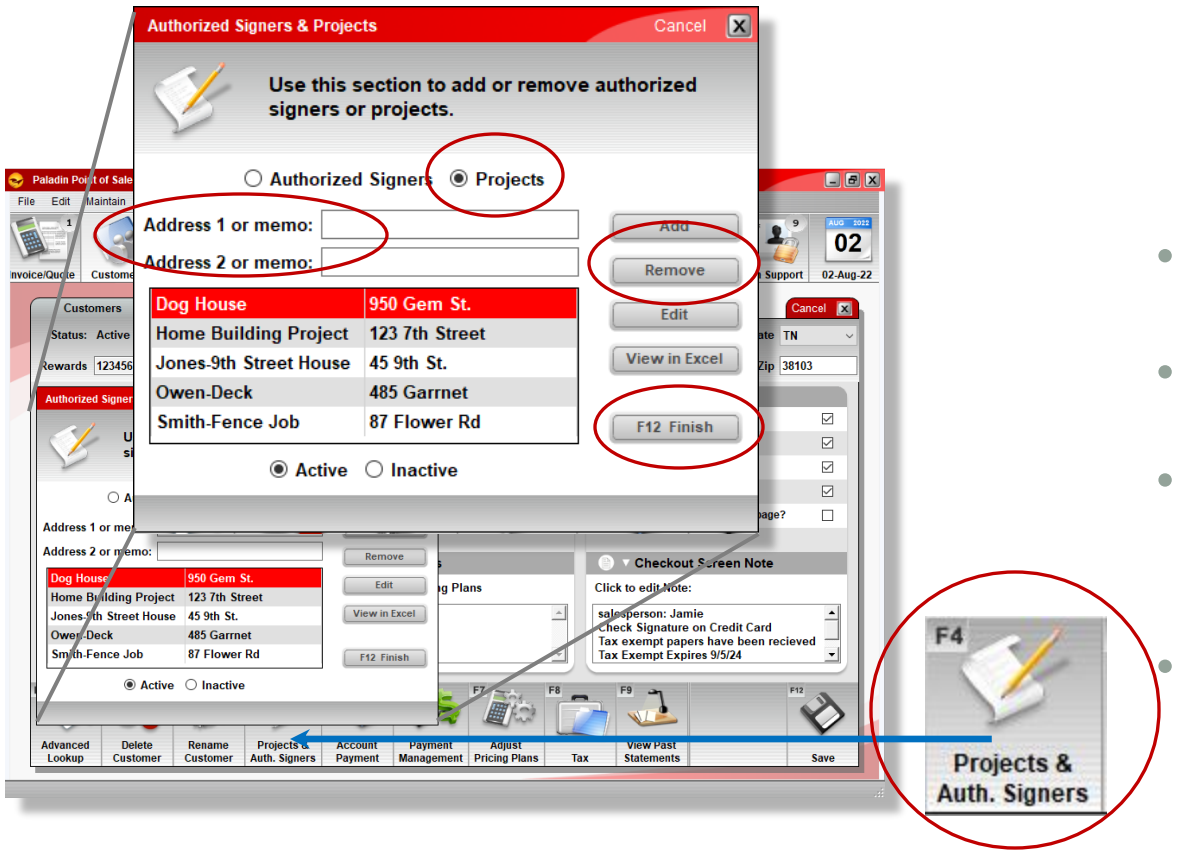
Managing Projects/Jobs in Paladin

- Creating projects for accounts.
- Deactivating & restoring projects.
- Applying customer invoices and credits to projects.
- Project reporting by customer.
- Project breakdown with emailed statements.
- Open item accounting by project.
- View invoice payment history by project.
- Getting creative with the project feature.
- Bonus material
- Wrap up

Managing projects/jobs in Paladin

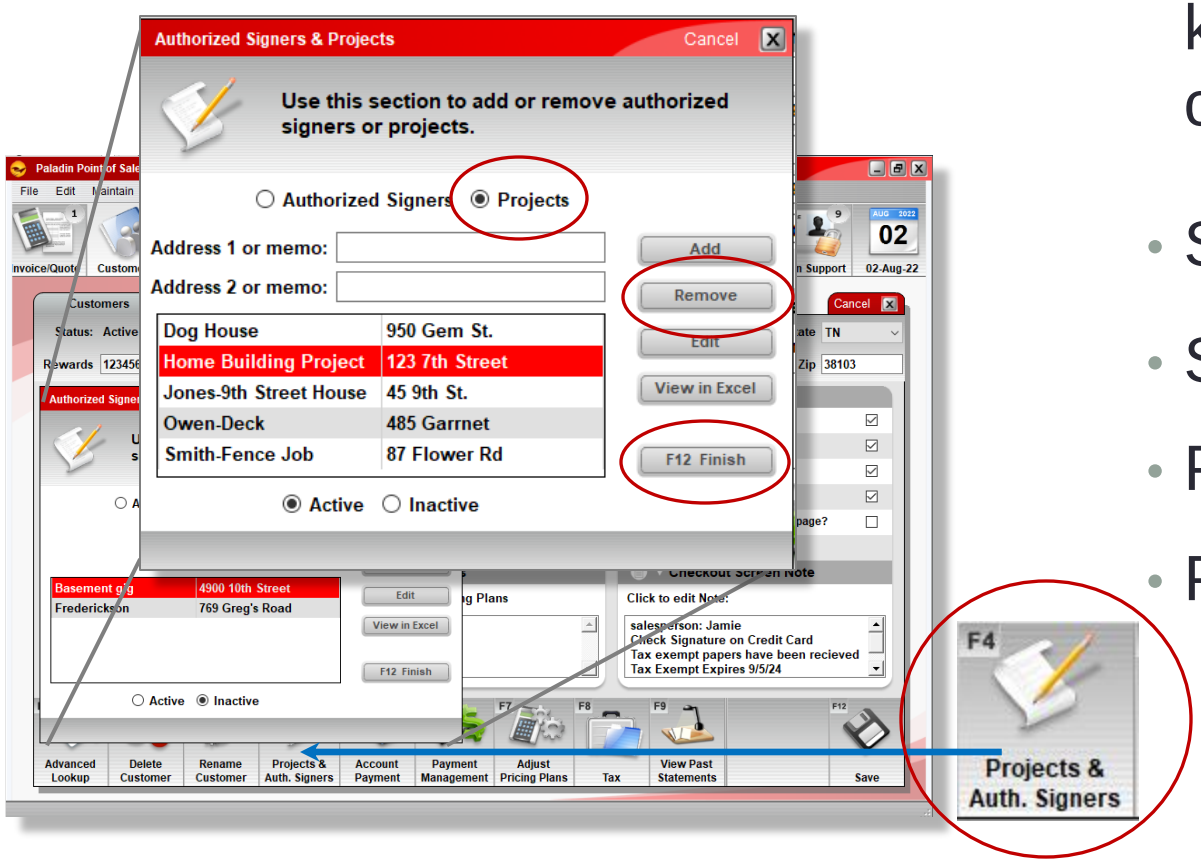
- Contractors – builders, plumbers, electricians, painters, et cetera – are constantly moving from job to job and buying supplies for each of their projects.
- B2B suppliers like hardware stores and lumberyards provide these contractors a value-added service by helping manage their project expenses and credits.
- It's also vital for suppliers to accurately manage their accounts receivable.
- Paladin's enhanced project payment management can help do that.

Creating projects for accounts



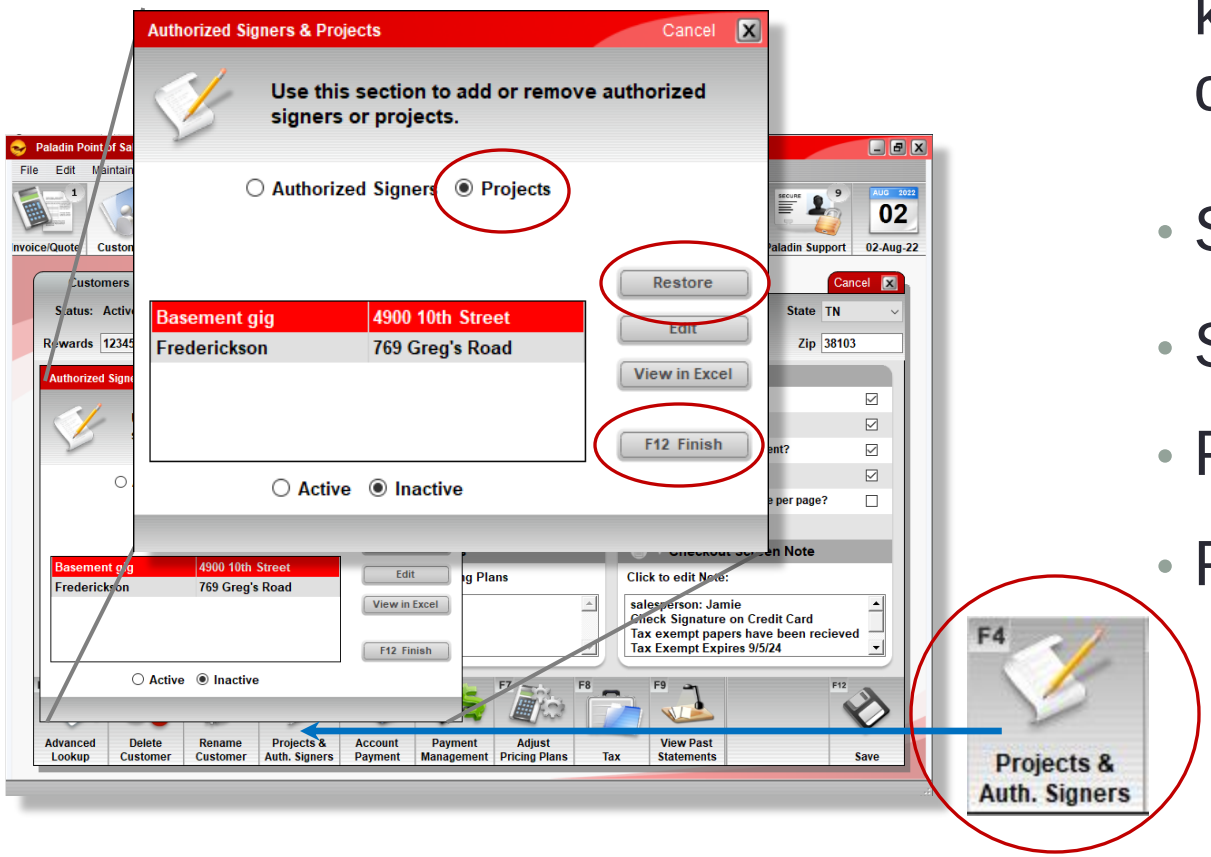
- Go to: **Customer** module and press the **F4** key or click the **Projects & Auth. Signers** command.
- Select the ◉ **Projects** radio button.
- Select the **Add** button.
- Enter an **Address** or **Memo** on one or both lines.
- Press the **F12** key or click **Finish**

Deactivating projects



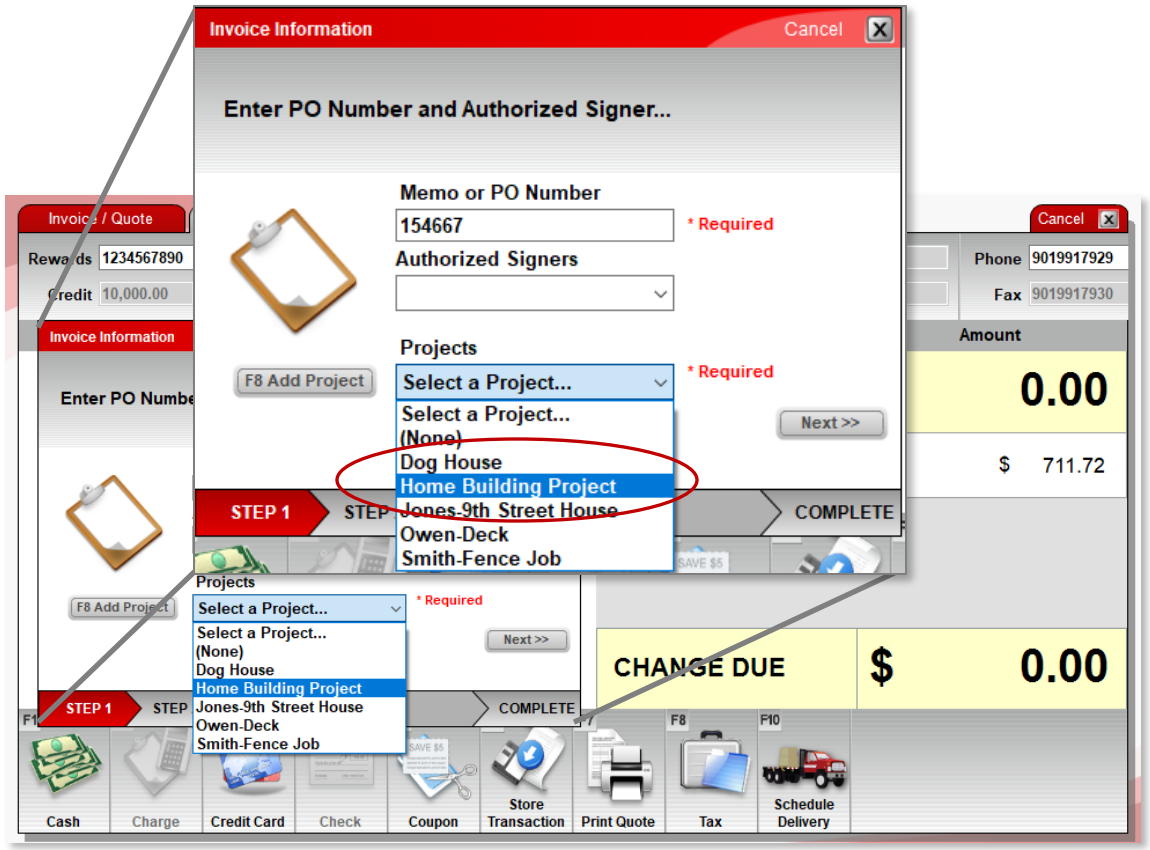
- Go to: **Customer** module and press the **F4** key or click the **Projects & Auth. Signers** command.
- Select the ◉ **Projects** radio button.
- Select a **Project** to remove.
- Press the **Remove** button.
- Press the **F12** key or click **Finish**

Restoring projects



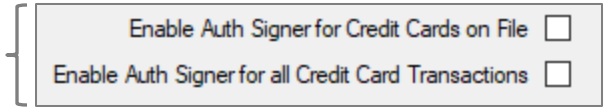
- Go to: **Customer** module and press the **F4** key or click the **Projects & Auth. Signers** command.
- Select the ◉ **Projects** radio button.
- Select a **Project** to restore.
- Press the **Restore** button.
- Press the **F12** key or click **Finish**

Applying customer invoices and credits to projects



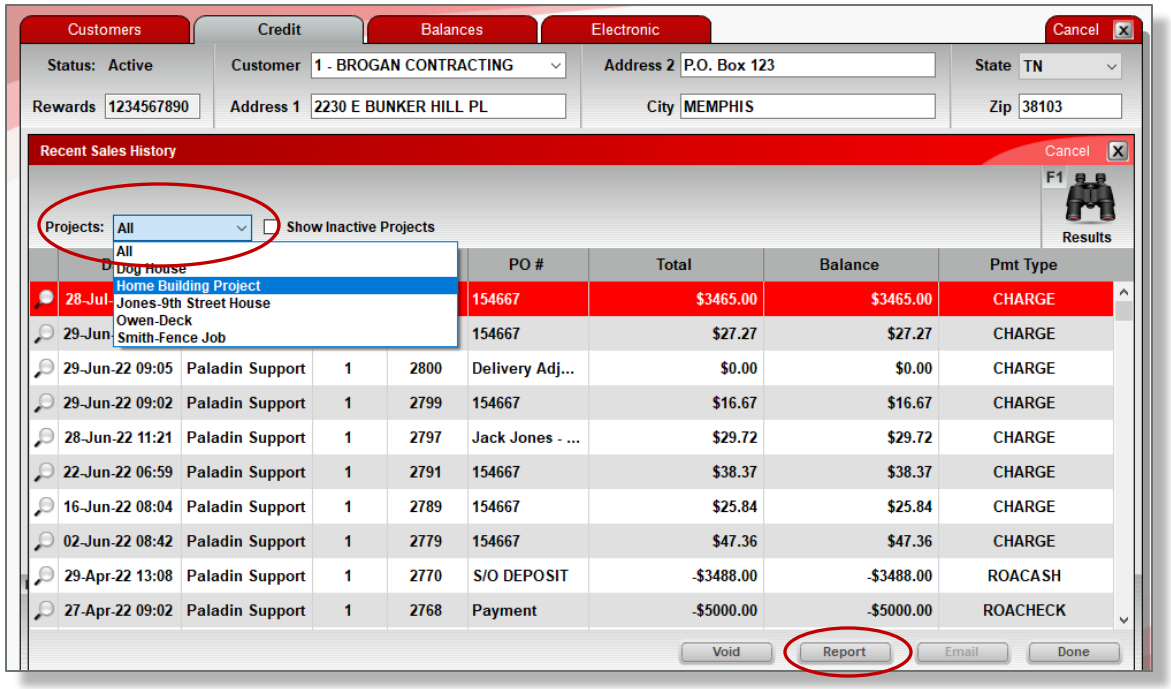
- Easily apply projects to customer invoices and credits during the checkout process.
- At checkout, when selecting charge on account (or optionally payment by credit card for charge account customers) the system will automatically prompt to select a **Project**.

File->Setup->Credit Card tab



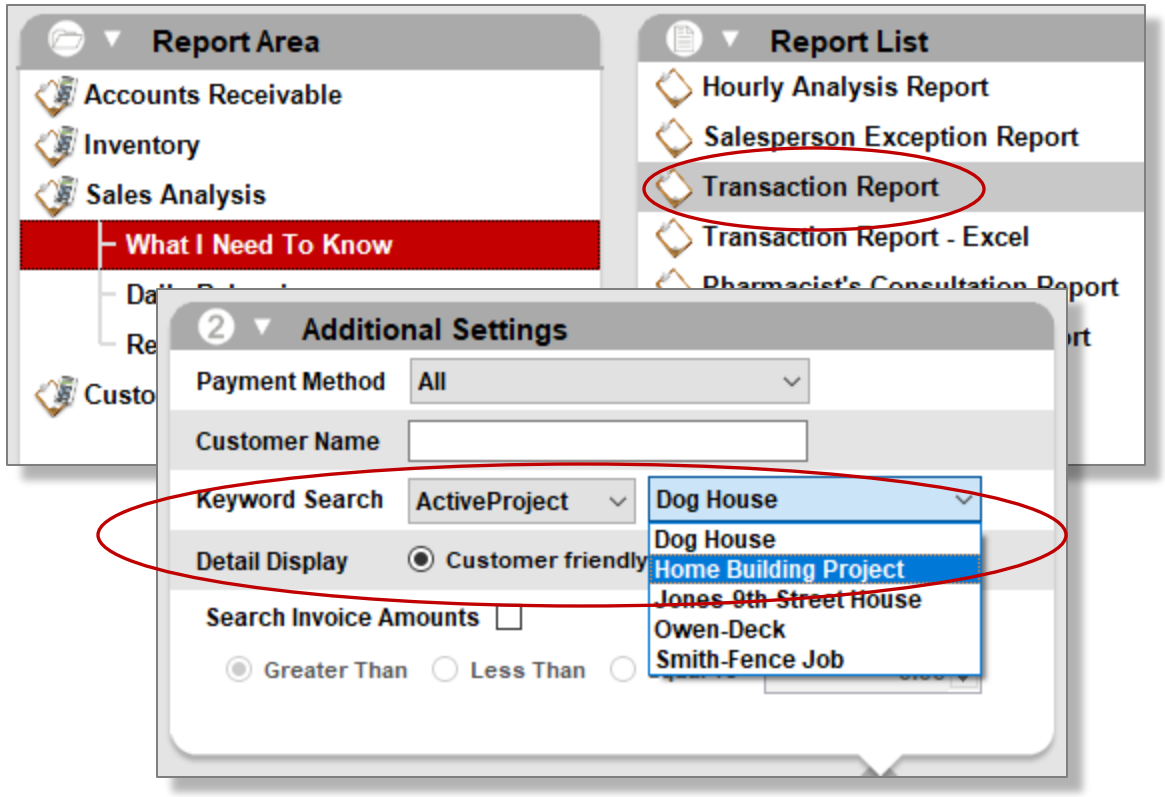
- This is true for both charges and credits.
- Choose an existing project from the **Projects** drop-down list or add a new one.
- Press the **Next** button to continue the checkout process.

Project listing report from the Customer module



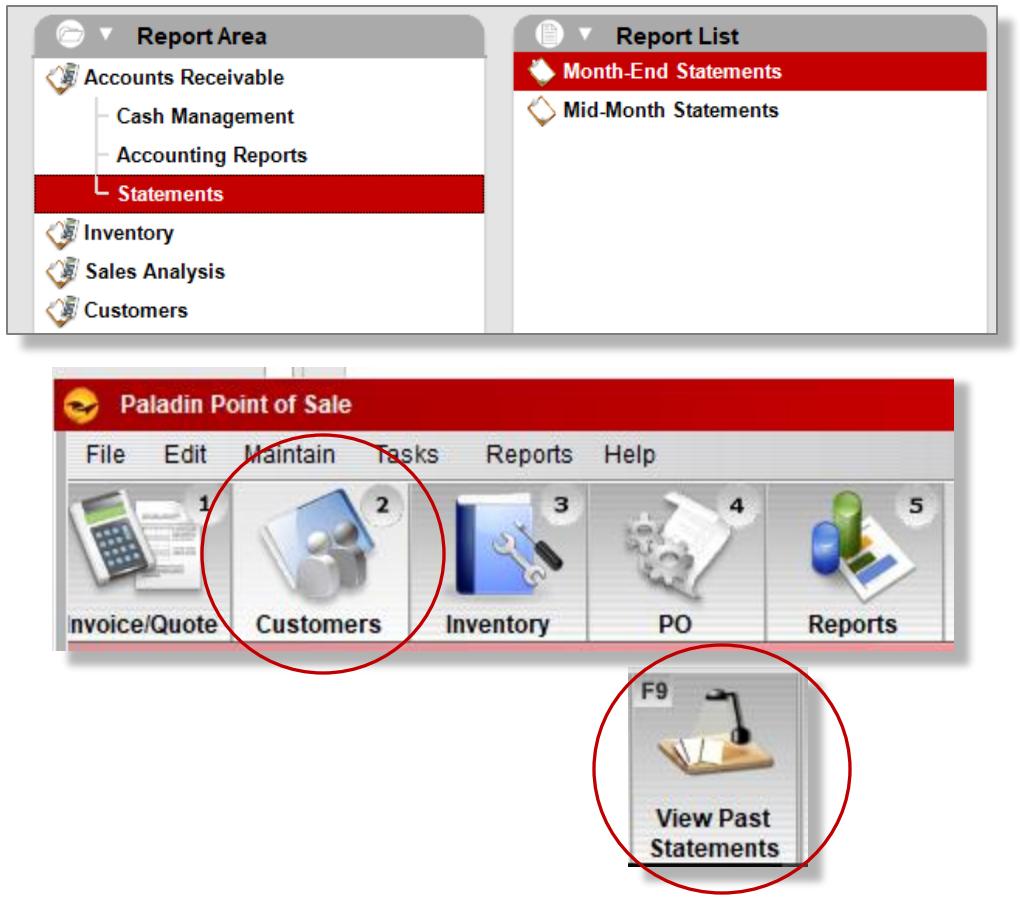
- Providing a breakdown of invoices by project is an added service for contractors offering the ability to group and manage their expenses by project.
- To view a listing of project invoices for each customer, go to: **Customer** module, select the **Credit** tab and choose the customer friendly **Sales History** magnify glass.
- Choose a project from the **Projects** drop-down list.
- Press the **Report** button to print to Excel.

Project invoice detail report from the Reports module



- To acquire a project invoice detail report by project, for a customer, go to: **Reports** module and select **Sales Analysis, What I Need to Know, Transaction Report**.
- In the Report Settings, choose a customer by entering in the Customer ID range.
- Then under the **Additional Settings** window, press on the **Keyword Search** drop-down and select ActiveProject, then choose your project from the list to the right.
- Press the **F12 key** or click the **Report** button.

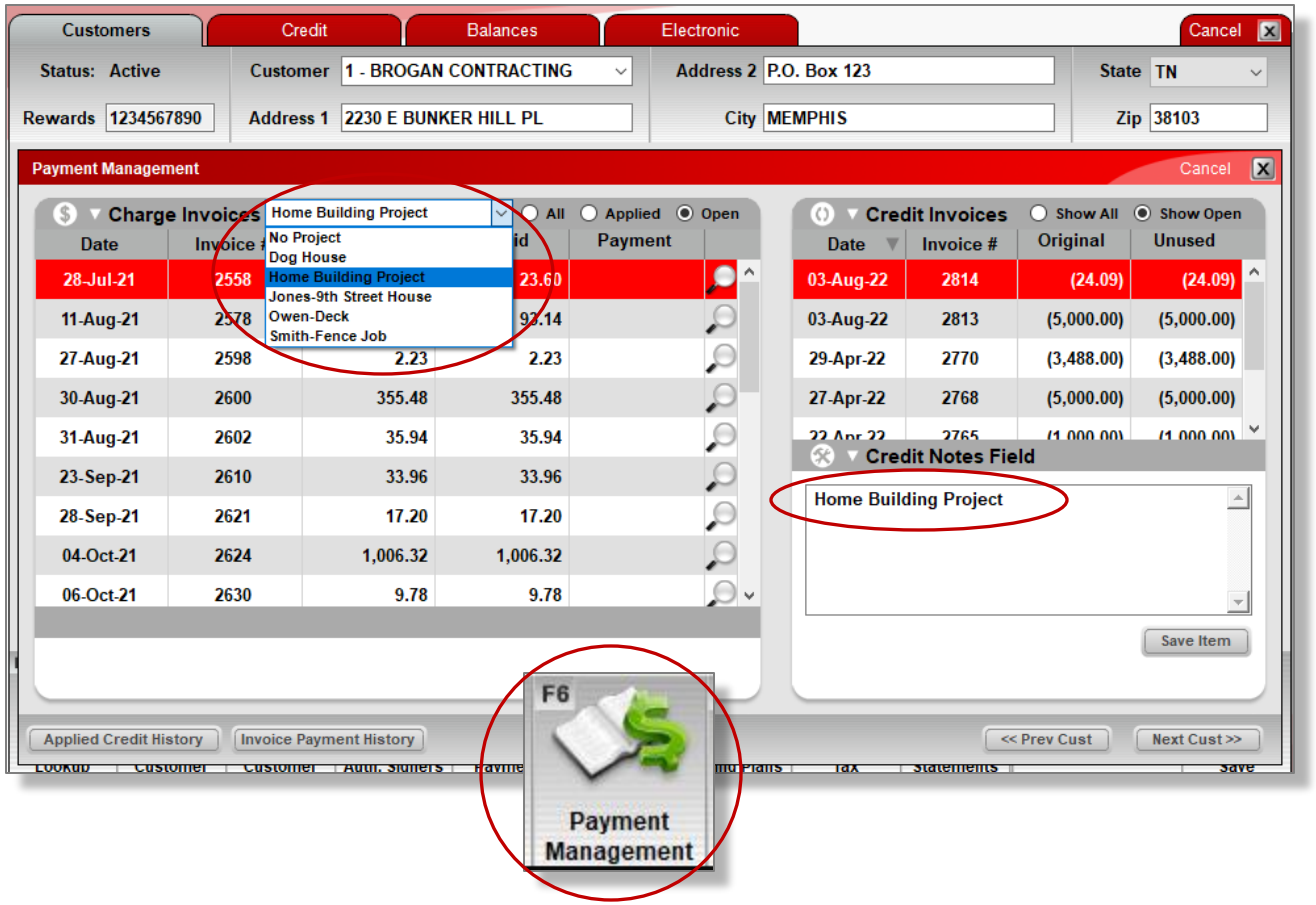
Project breakdown with emailed statements



- When statements are emailed, they will automatically include a breakdown report of the projects for each emailed customer.
- To generate a project breakdown report for USPS mailed customers, following the statement run, simply go to the **Customer** module and press the **F9** or click on the **View Past Statements** button. This will immediately produce both a reprint of the statement and an Excel project breakdown report that can be printed or emailed to the customer.

Note: In process of rolling out to the General Release

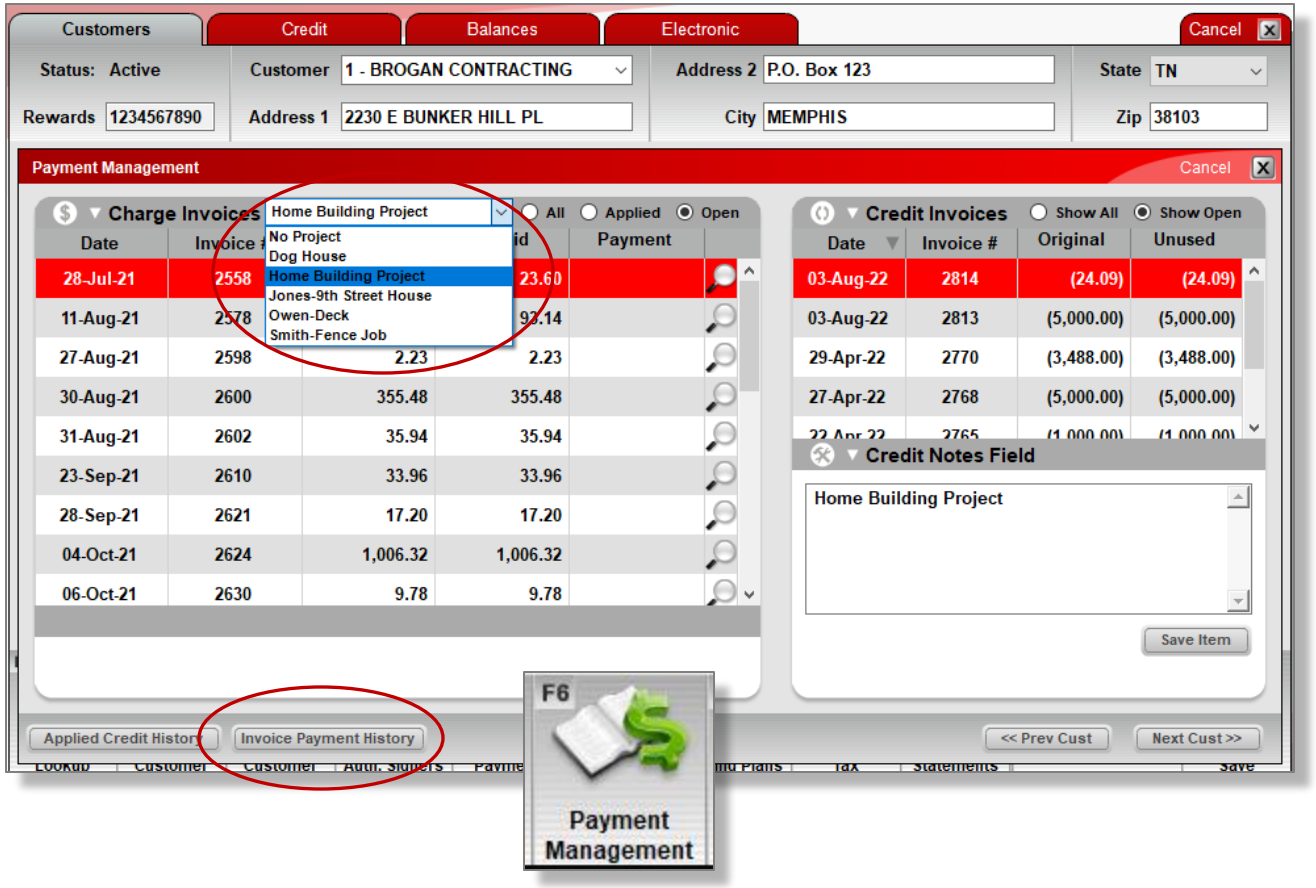
Open item accounting by project



- In **Open Item** accounting you can link a payment or a credit to a project.
- Go to: **Customer** module and press the **F6** key or click on the **Payment Management** command.
- Under **Charge Invoices** window, select the **Project** name from the drop-down menu.
- Then choose the **Credit Invoice** to associate with the **Charge Invoice** for each project.

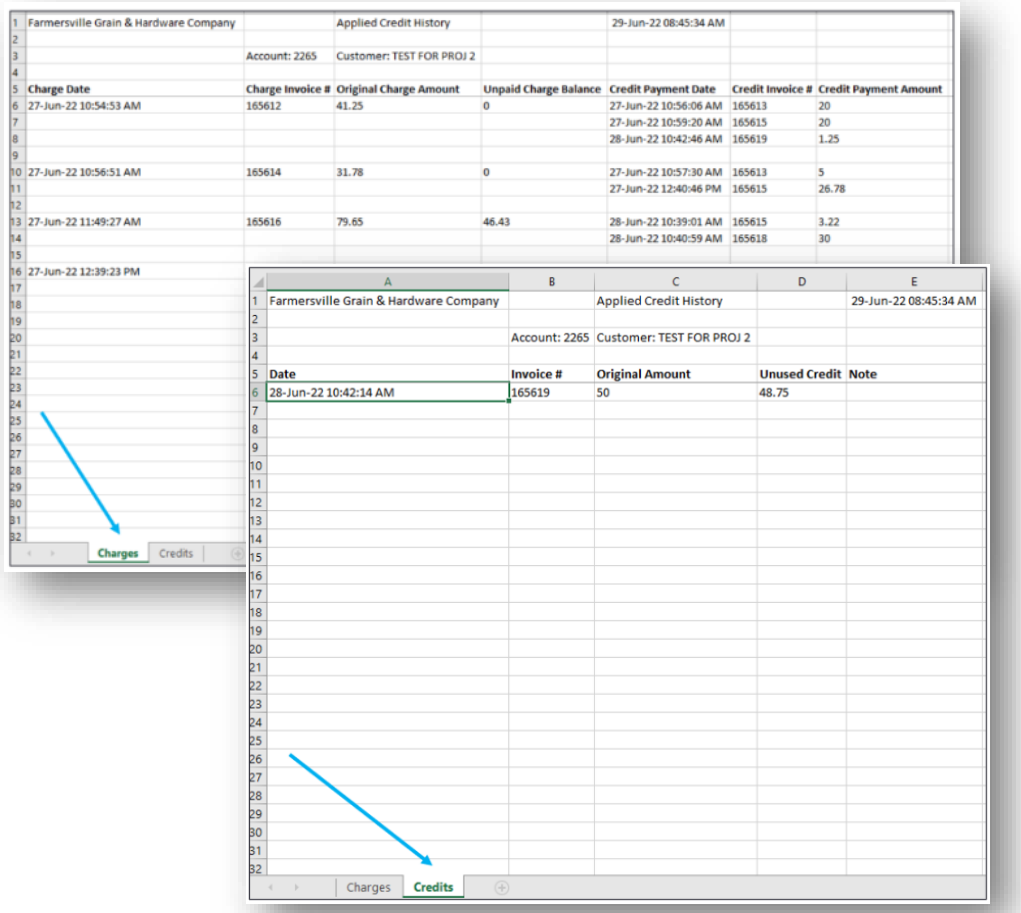
Note: In process of rolling out to the General Release

View invoice payment history by project



- In **Open Item** accounting you can produce an **Invoice Payment History** report by project.
- Go to: **Customer** module and press the **F6** key or click on the **Payment Management** command.
- Under **Charge Invoices** window, select the **Project** name from the drop-down menu.
- Then click the **Invoice Payment History** button on the bottom of the window. It shows both charges and credits.

View invoice payment history by project



1	Farmersville Grain & Hardware Company		Applied Credit History		29-Jun-22 08:45:34 AM		
2							
3		Account: 2265	Customer: TEST FOR PROJ 2				
4							
5	**Charge Date**	**Charge Invoice #**	**Original Charge Amount**	**Unpaid Charge Balance**	**Credit Payment Date**	**Credit Invoice #**	**Credit Payment Amount**
6	27-Jun-22 10:54:53 AM	165612	41.25	0	27-Jun-22 10:56:06 AM	165613	20
7					27-Jun-22 10:59:20 AM	165615	20
8					28-Jun-22 10:42:46 AM	165619	1.25
9							
10	27-Jun-22 10:56:51 AM	165614	31.78	0	27-Jun-22 10:57:30 AM	165613	5
11					27-Jun-22 12:40:46 PM	165615	26.78
12							
13	27-Jun-22 11:49:27 AM	165616	79.65	46.43	28-Jun-22 10:39:01 AM	165615	3.22
14					28-Jun-22 10:40:59 AM	165618	30
15							
16	27-Jun-22 12:39:23 PM						

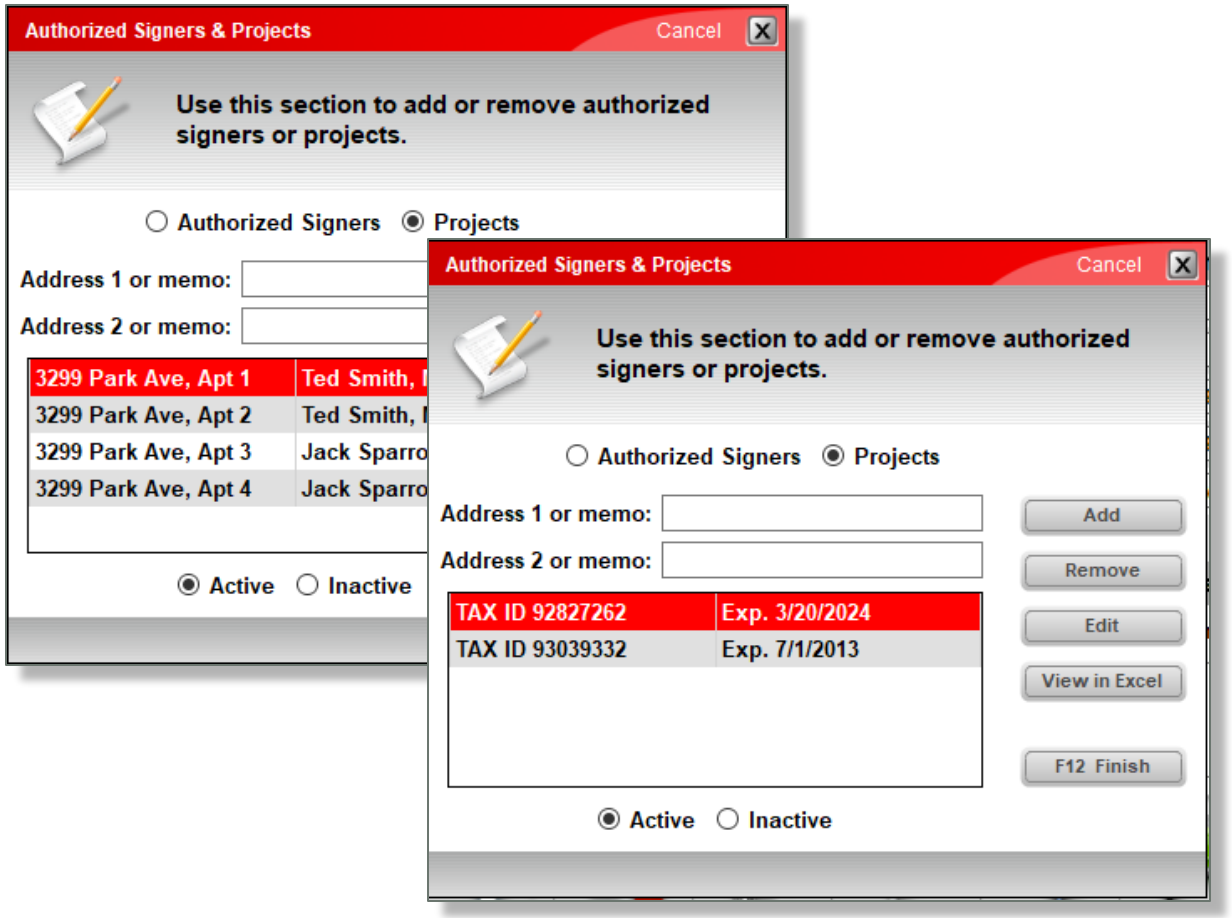
Charges | Credits

	A	B	C	D	E
1	Farmersville Grain & Hardware Company		Applied Credit History		29-Jun-22 08:45:34 AM
2					
3		Account: 2265	Customer: TEST FOR PROJ 2		
4					
5	**Date**	**Invoice #**	**Original Amount**	**Unused Credit**	**Note**
6	28-Jun-22 10:42:14 AM	165619	50	48.75	

Charges | Credits

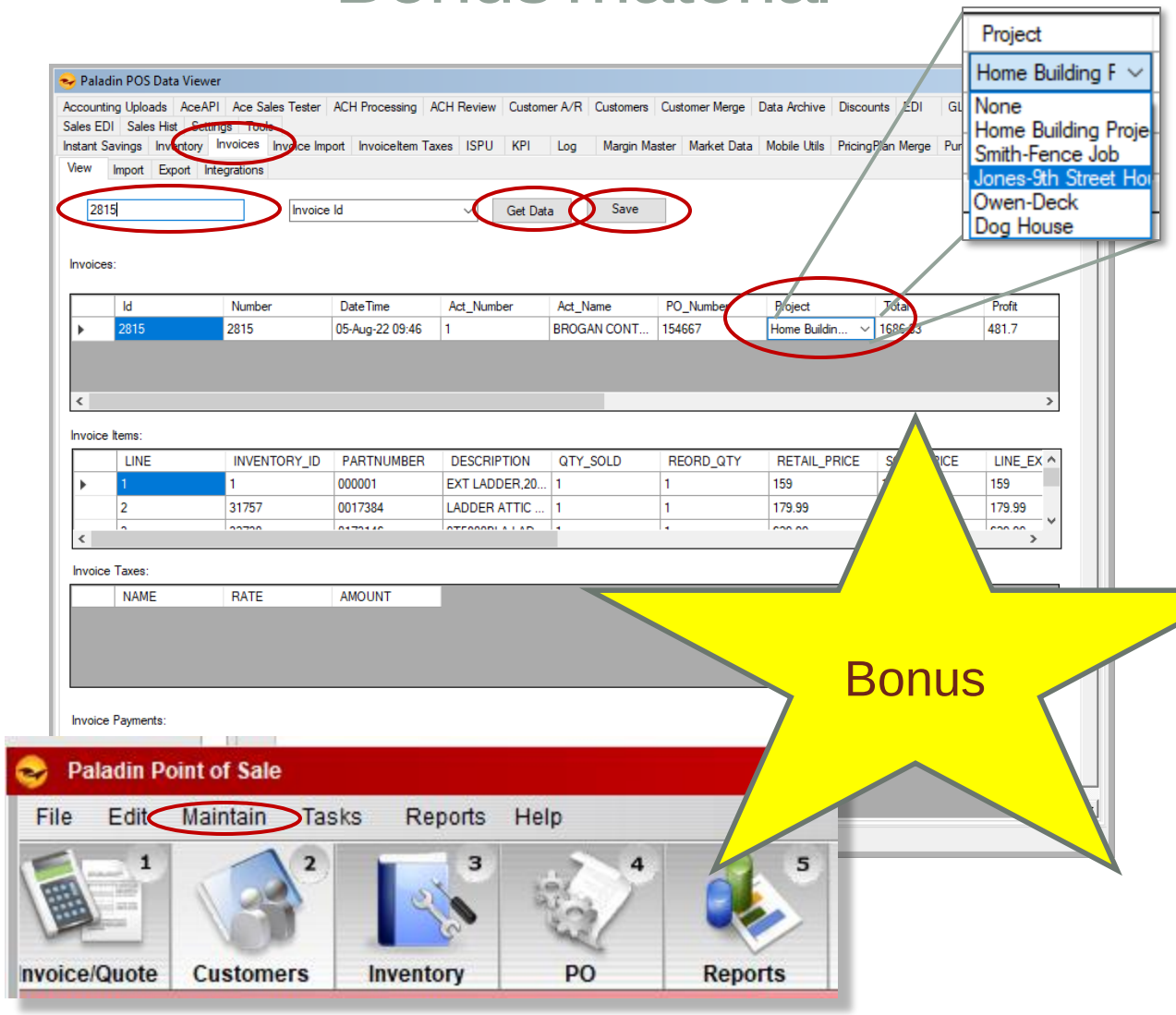
- In **Open Item** accounting you can produce an **Invoice Payment History** report by project.
- Go to: **Customer** module and press the **F6** key or click on the **Payment Management** command.
- Under **Charge Invoices** window, select the **Project** name from the drop-down menu.
- Then click the **Invoice Payment History** button on the bottom of the window. It shows both charges and credits.

Getting creative with the project feature.



- If project/job-based assignment isn't applicable for your store. There are other ways to use this tool.
- You can help **property management** companies by grouping apartment buildings and apartment numbers.
- Some farmers and ranchers have one or more **tax exemption ID's**. Add the tax exemption ID and expiration date for easy tax tracking and reporting.

Bonus material



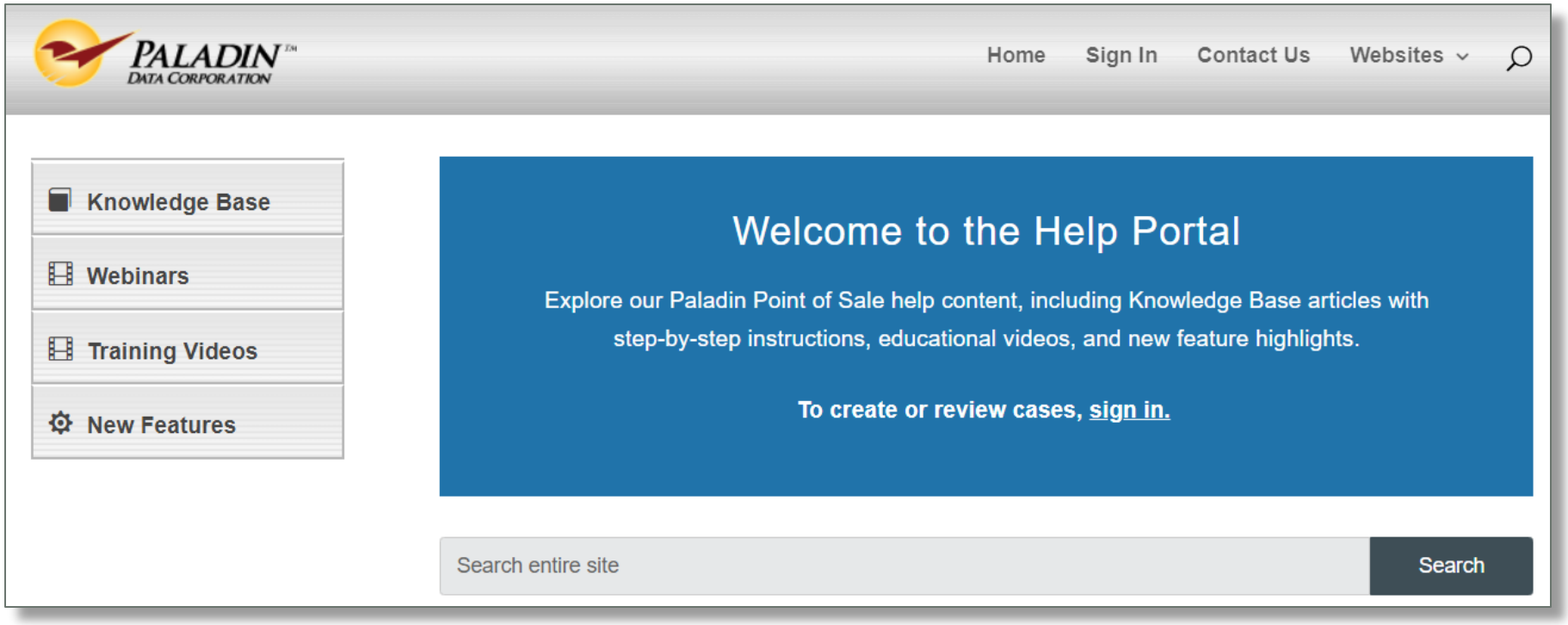
If needed, it is possible to change the Project assignment after finalizing the Invoice.

- Go to: **Maintain->DataViewer-> Invoices** tab.
- Enter the desired **Invoice Id** (number).
- Click on the **Get Data** button.
- Select the desired P**roject** from the drop-down list.
- Press the **Save** key to save the change.

Where to find more information

http://portal.paladinpos.com

- Detailed written instructions are available on the Paladin knowledgebase.
  - Knowledgebase article (KBA) instructions
  - Webinar presentations



Next webinar:

Paladin Pointers:
Advanced Sales – BOGOs and More

September 13th at 9:00 am PT

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