

SUPPORT DOCUMENT

Bookmarking Documents on Palladium
Enterprise



Bookmarking Documents on Palladium Enterprise

Table of Contents

| | |
|---|---|
| How does this feature help your business?..... | 3 |
| FEATURE OPTIONS..... | 3 |
| Process a Document and Bookmark It! | 3 |
| Accessing Of Bookmarked Documents..... | 4 |
| Navigating Through the Bookmarked Documents | 5 |
| Copying the Bookmarked Documents | 6 |

Bookmarking Documents on Palladium Enterprise

This feature allows you to create documents and bookmark them for later recall or reference.

How does this feature help your business?

- Copy information from one or more documents to the current document
- Search for bookmarked documents, across all documents whether from Accounts Receivable or Payable
- Offers salespersons a quick reference lookup function

The Following Documents offer the ability to bookmark as well as refer to bookmarked documents:

Accounts Payable:

- Purchase Orders
- Purchase Invoices

Accounts Receivable:

- Sales Orders
- Sales Invoices
- Freehand Quotes

FEATURE OPTIONS

Process a Document and Bookmark It!

While processing a document, select the Bookmark option as shown below then Record (update) the document accordingly. This document is now Bookmarked, for later recall. In addition you can change the Bookmark status of a document by simply amending the "Document Info".

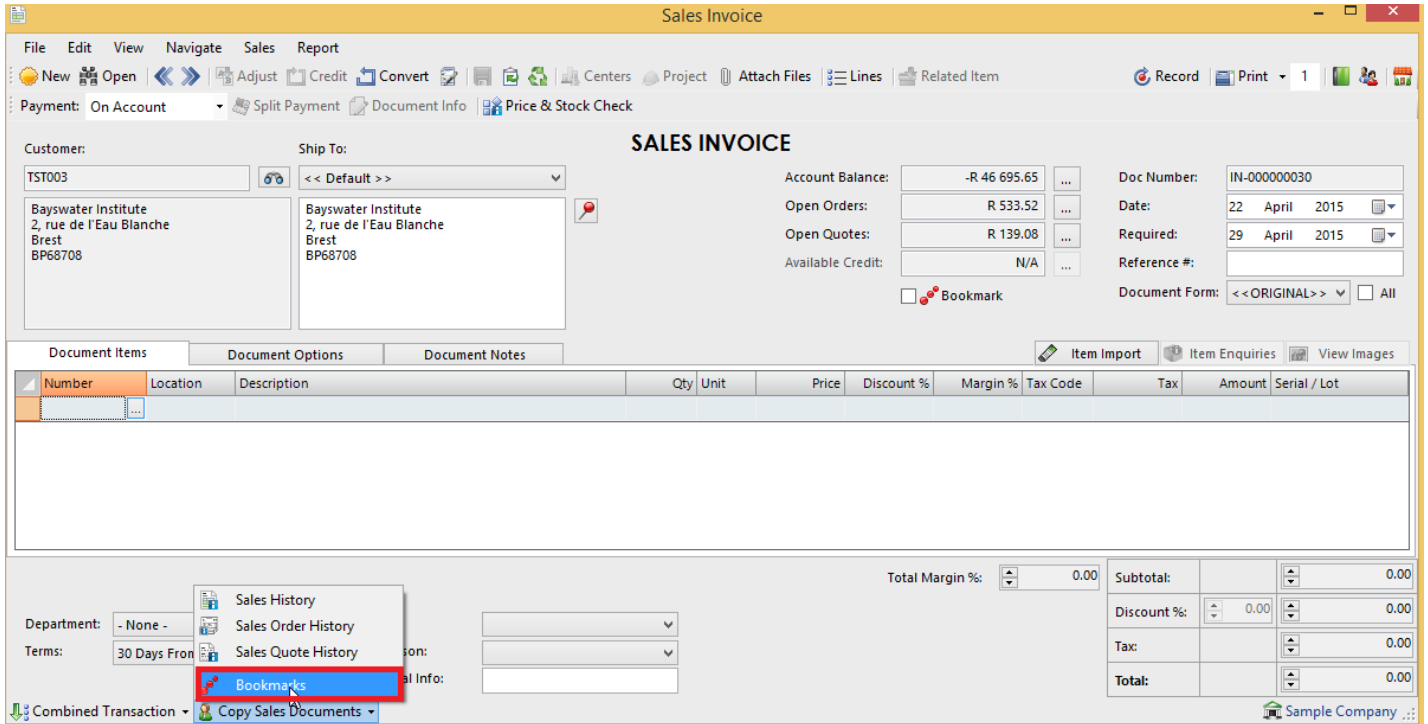
The screenshot shows the 'Sales Invoice' window in Palladium Enterprise. The interface includes a menu bar (File, Edit, View, Navigate, Sales, Report), a toolbar with various actions like New, Open, Adjust, Credit, Convert, etc., and a main workspace. The workspace is divided into several sections: Customer and Ship To information, financial summary (Account Balance, Open Orders, Open Quotes, Available Credit), and document details (Doc Number, Date, Required, Reference #, Document Form). A 'Bookmark' checkbox is highlighted with a red box. Below this is a table of 'Document Items' with columns for Number, Location, Description, Qty, Unit, Price, Discount %, Margin %, Tax Code, Tax, Amount, and Serial / Lot. At the bottom, there are fields for Department, Terms, Status, Sales Person, and Additional Info, along with a summary of financial totals (Total Margin %, Subtotal, Discount %, Tax, Total).

| Number | Location | Description | Qty | Unit | Price | Discount % | Margin % | Tax Code | Tax | Amount | Serial / Lot |
|--------|----------|--------------|-----|------|--------|------------|----------|----------|--------|----------|--------------|
| inv | DEFAULT | Camps Stuff | 7 | EA | 28.99 | 0.00 | 100.00 | 01 | 28.41 | 202.93 | |
| inv3 | DEFAULT | Sleeping Bag | 7 | EA | 450.00 | 0.00 | 100.00 | 01 | 441.00 | 3 150.00 | |
| inv4 | DEFAULT | Tent | 3 | EA | 799.99 | 0.00 | 100.00 | 01 | 336.00 | 2 399.97 | |

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Accessing Of Bookmarked Documents

The option to view Bookmarked documents will be enabled when you process a new document. You simply click on "View Sales History" and the Bookmarks option appears as shown below.



Bookmarking Documents on Palladium Enterprise

The following screen will appear displaying documents that have been Bookmarked, at this point only documents that belong to this customer will be shown. Document lines are shown individually, so you may select a combination of items from different documents.

View Bookmarks or Select Purchase / Sales Documents to Copy

Search: Collapse All Bookmarks

Start: 22 March 2015 End: 29 February 2016 Refresh

Double Click Item To View Document

| 1 * Document | Doc Date | Name | Reference | Select | Part Number | Project Number | Avail Qty | Qty | Price | Discount % | Tax Code | Tax | Amount |
|--------------------|------------|-----------------------|-----------|--------------------------|-------------|----------------|-----------|-------|--------|------------|----------|--------|----------|
| Total IN-000000029 | | | | | | | | 17.00 | | | | 805.41 | 5 752.90 |
| IN-000000029 | 2015-04-22 | Ashburton Reinforcing | | <input type="checkbox"/> | inv | | -16.00 | 7.00 | 28.99 | 0.00 | 01 | 28.41 | 202.93 |
| IN-000000029 | 2015-04-22 | Ashburton Reinforcing | | <input type="checkbox"/> | inv3 | | -11.00 | 7.00 | 450.00 | 0.00 | 01 | 441.00 | 3 150.00 |
| IN-000000029 | 2015-04-22 | Ashburton Reinforcing | | <input type="checkbox"/> | inv4 | | -6.00 | 3.00 | 799.99 | 0.00 | 01 | 336.00 | 2 399.97 |
| Total PI-000000010 | | | | | | | | 76.00 | | | | 659.84 | 4 713.13 |
| PI-000000010 | 2015-04-08 | Catanach Douglas | | <input type="checkbox"/> | InvItem | PROJECT X | 793.85 | 24.00 | 144.93 | 0.05 | 02 | 486.96 | 3 478.26 |
| PI-000000010 | 2015-04-08 | Catanach Douglas | | <input type="checkbox"/> | 1540-0000 | PROJECT X | 0.00 | 13.00 | 28.99 | 0.00 | 02 | 52.76 | 376.87 |
| PI-000000010 | 2015-04-08 | Catanach Douglas | | <input type="checkbox"/> | inv2 | PROJECT X | 10.63 | 39.00 | 22.00 | 0.00 | 02 | 120.12 | 858.00 |
| Total IN-000000020 | | | | | | | | 88.00 | | | | 308.00 | 2 200.00 |
| IN-000000020 | 2015-04-08 | Belvedere Nursing | | <input type="checkbox"/> | inv2 | | 10.63 | 88.00 | 25.00 | 0.00 | 01 | 308.00 | 2 200.00 |

Select All OK Cancel

Navigating Through the Bookmarked Documents

You may search for bookmarked documents for a different customer by entering text within a customer code, or when you click on the customer filter option indicated below, a list of all customers appears then simply select the required customer.

Search: Customer: TST001

When there are multiple bookmarked documents you may choose the Expand All option which will show all the lines within a document.

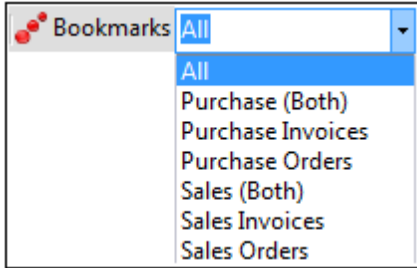
Expand All

The Collapse All option will show you the document headers only.

Collapse All

Bookmarking Documents on Palladium Enterprise

The Bookmarks option below also allows you to choose different types of documents to view or you can simply select to view "All Documents".



Copying the Bookmarked Documents

When you are satisfied with the documents you have selected to copy or use as a reference, click on Ok and your selection is copied to the document you are processing from. If you want to view the document you are copying before making a selection, double click on it as a drill-down, and it will be displayed on the screen. This could be used to view a deliver address, document status, or even a document discount for example.

View Bookmarks or Select Purchase / Sales Documents to Copy

Search: Collapse All Bookmarks All

Start: Sunday, February End: Monday, February Refresh

Double Click Item To View Document

| 1 * | Document Number | Doc Date | Name | Select | Part Number | Avail Qty | Qty | Price | Tax Code | Tax | Amount |
|-----|--------------------|-----------|-----------------------|-------------------------------------|-------------|-----------|----------|------------|----------|-----------|------------|
| | Total SO-000000001 | | | | | | 1.00 | 1,222.00 | | 171.08 | 1,222.00 |
| | SO-000000001 | 01-Mar-15 | Askew Shopping Center | <input checked="" type="checkbox"/> | InvItem | 887.00 | 1.00 | 1,222.00 | 01 | 171.08 | 1,222.00 |
| | Total PO-000000002 | | | | | | 12.00 | 276.00 | | 38.64 | 276.00 |
| | PO-000000002 | 01-Mar-15 | ACME Novelty | <input checked="" type="checkbox"/> | InvItem | 887.00 | 12.00 | 276.00 | 02 | 38.64 | 276.00 |
| | Total PO-000000001 | | | | | | 1,222.00 | 406,926.00 | | 56,969.64 | 406,926.00 |
| | PO-000000001 | 01-Mar-15 | Abercrombie Hardware | <input type="checkbox"/> | InvItem | 887.00 | 1,222.00 | 406,926.00 | 02 | 56,969.64 | 406,926.00 |
| | Total PI-000000005 | | | | | | 2.00 | 1,000.00 | | 140.00 | 1,000.00 |
| | PI-000000005 | 01-Mar-15 | Abercrombie Hardware | <input checked="" type="checkbox"/> | 2000 | 2.00 | 2.00 | 1,000.00 | 02 | 140.00 | 1,000.00 |
| | Total PI-000000004 | | | | | | 1.00 | 10,000.00 | | 1,400.00 | 10,000.00 |
| | PI-000000004 | 01-Mar-15 | Abercrombie Hardware | <input type="checkbox"/> | 0001 | 1.00 | 1.00 | 10,000.00 | 02 | 1,400.00 | 10,000.00 |
| | Total IN-000000024 | | | | | | 1.00 | 6,757.00 | | 945.98 | 6,757.00 |
| | IN-000000024 | 01-Mar-15 | Ashburton Reinforcing | <input checked="" type="checkbox"/> | S2015 | 0.00 | 1.00 | 6,757.00 | 01 | 945.98 | 6,757.00 |
| | Total IN-000000023 | | | | | | 1.00 | 1,241.00 | | 173.74 | 1,241.00 |
| | IN-000000023 | 01-Mar-15 | Ashburton Reinforcing | <input type="checkbox"/> | S1060 | 0.00 | 1.00 | 1,241.00 | 01 | 173.74 | 1,241.00 |
| | Total IN-000000022 | | | | | | 19.00 | 20,627.50 | | 2,887.85 | 20,627.50 |
| | IN-000000022 | 01-Mar-15 | Ashburton Reinforcing | <input checked="" type="checkbox"/> | InvItem | 887.00 | 1.00 | 1,140.00 | 01 | 159.60 | 1,140.00 |
| | IN-000000022 | 01-Mar-15 | Ashburton Reinforcing | <input type="checkbox"/> | S1020 | 0.00 | 12.00 | 18,000.00 | 01 | 2,520.00 | 18,000.00 |

Select All OK Cancel