



PaladinNsight™: Manage Your Inventory with the Investment Review Tool

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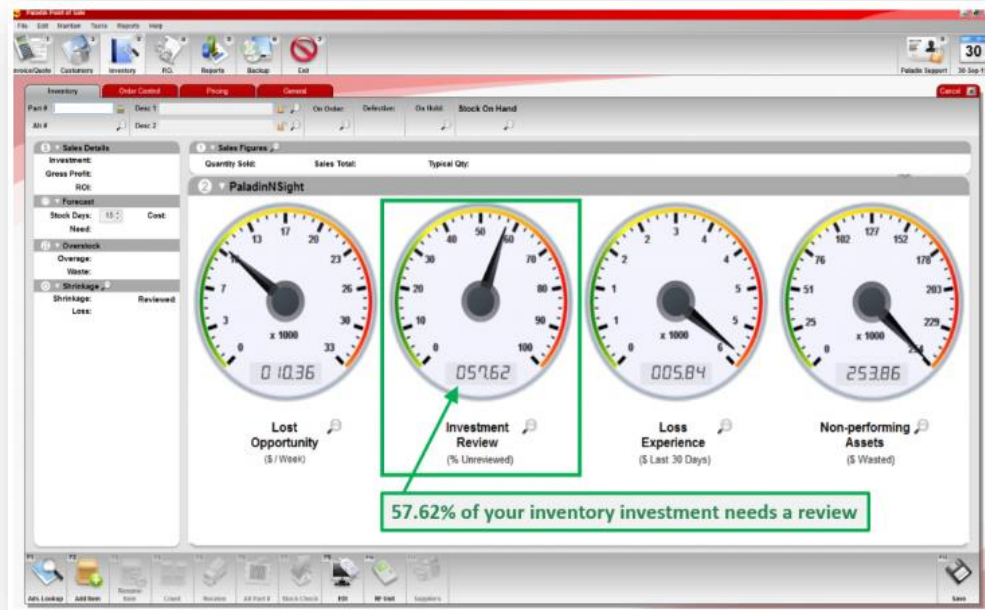
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WHAT YOU'LL LEARN

- About PaladinN Sight™ and the Investment Review tool.
- What inventory management means
- Investment Review tool: From overview to macro view.
 - Investment Review Meter
 - Investment Reviewer
 - Investment Reviewer details
- Best practices
- Demo

PaladinN Sight™ and the Investment Review Tool



- PaladinN Sight™ is powered by Paladin's sophisticated Market-Driven Inventory Management™ system and helps stores make informed decisions on how to maximize profits and minimize losses.
- The Investment Review Tool is part of the PaladinN Sight™ dashboard and tools that are available in the Inventory module.
- These tools provide a real-time view of how a store's inventory is performing.

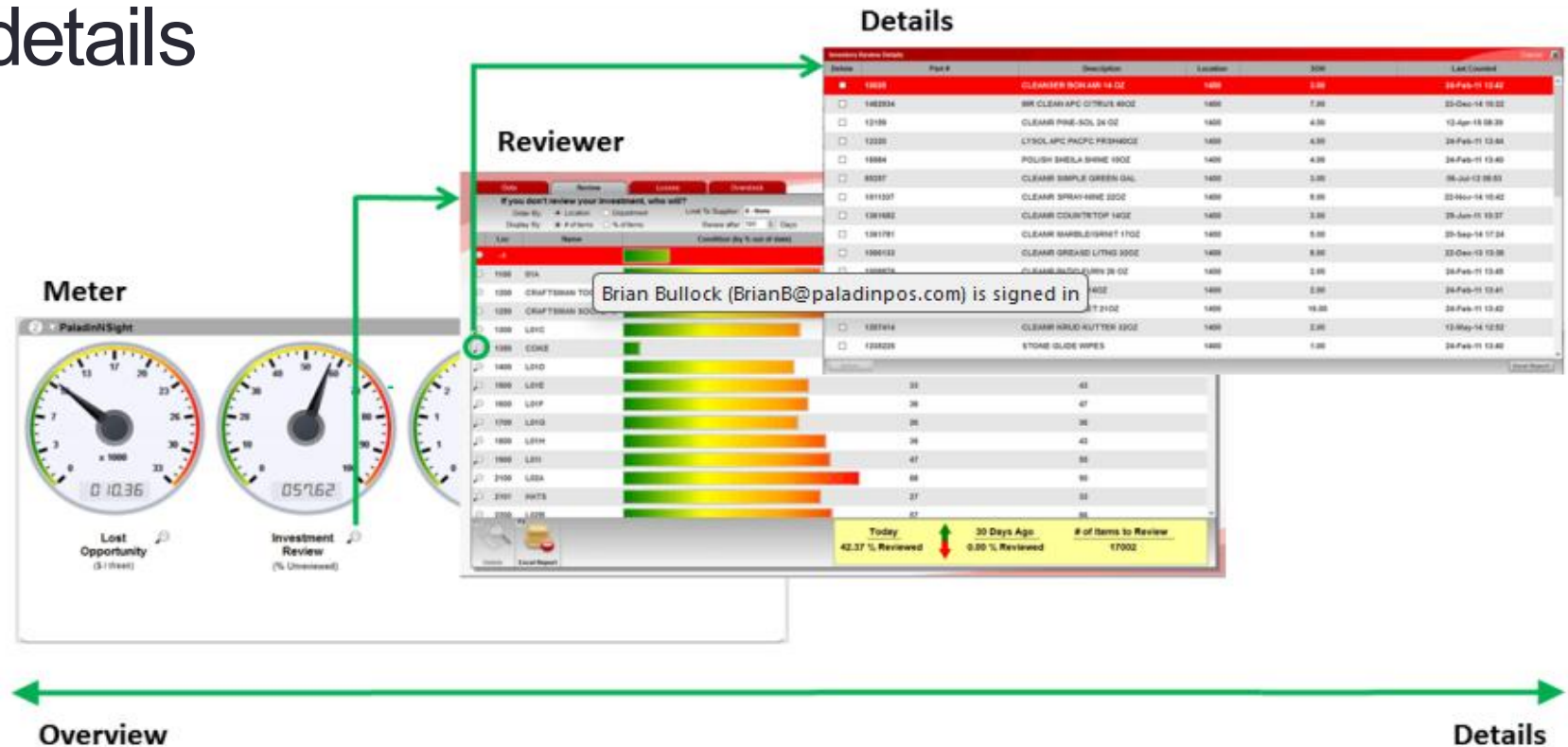
Managing inventory



- Inventory is a store's largest business investment.
- Return on investment (ROI) is highly correlated with the quality of a store's customer experience.
- Customer loyalty and ROI increase when a store's products are correctly labeled, easy to find, and attractively presented.
- When products are regularly reviewed you are managing your inventory investment.
- Failing to review your inventory regularly will eventually result in a less-than-satisfactory customer shopping experience.

Overview to fine details

The Investment Review Tool provides multiple levels of detail to help you manage your inventory investment.



Meter: Shows the overall percentage of unreviewed inventory. (Lower is better)

Reviewer: Is an interactive summary of unreviewed inventory grouped by department or location.

Details: Is a detailed list of unreviewed inventory items for a department or location.

Investment Review Meter



- The **Investment Review Meter** displays the percentage of inventory that was not reviewed in the last 180 days.
- Tip: Typically, the **% Unreviewed** meter value will be less than 10% when inventory reviews are performed year-round. To keep inventory on track, monitor this meter frequently for trends.
- Tip: If the **% Unreviewed** percentage is increasing over time, verify that reviews are being performed so trends can be reversed.

Investment Reviewer

- Click the **Investment Review Meter** magnifying glass to open the **Investment Reviewer**.
- This view gives you a detailed look of departments or locations with items that have not been reviewed in 180 days.



Investment Reviewer

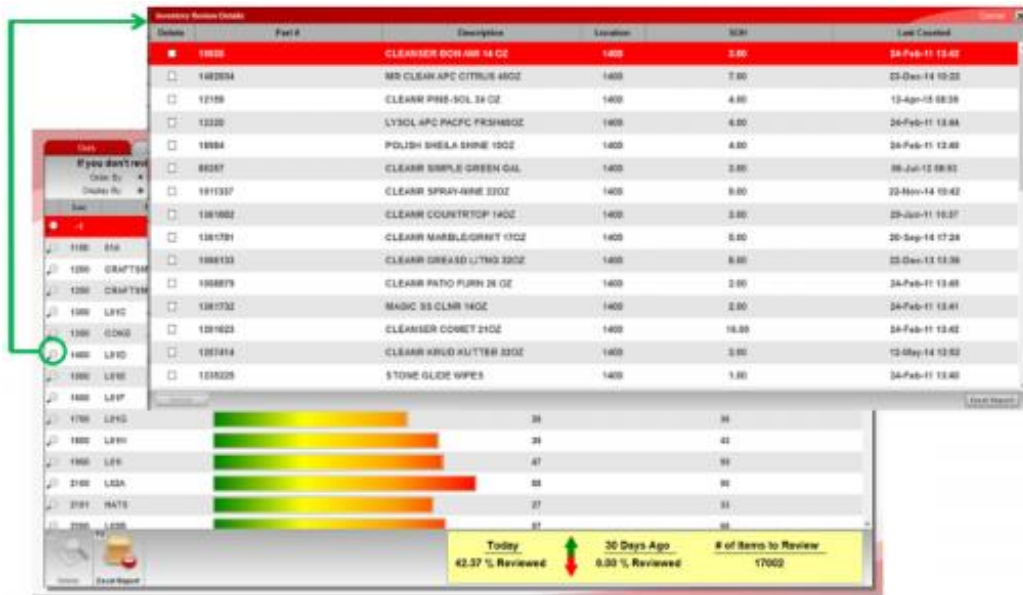
Customize your view by:

- Department or location
- # items or % of items
- # of days since the last review
- Supplier
- Sorting by any column's data (click the column title).

Tip: Sort the list by the # of Items to Review column so that the largest number of unreviewed items is on top.

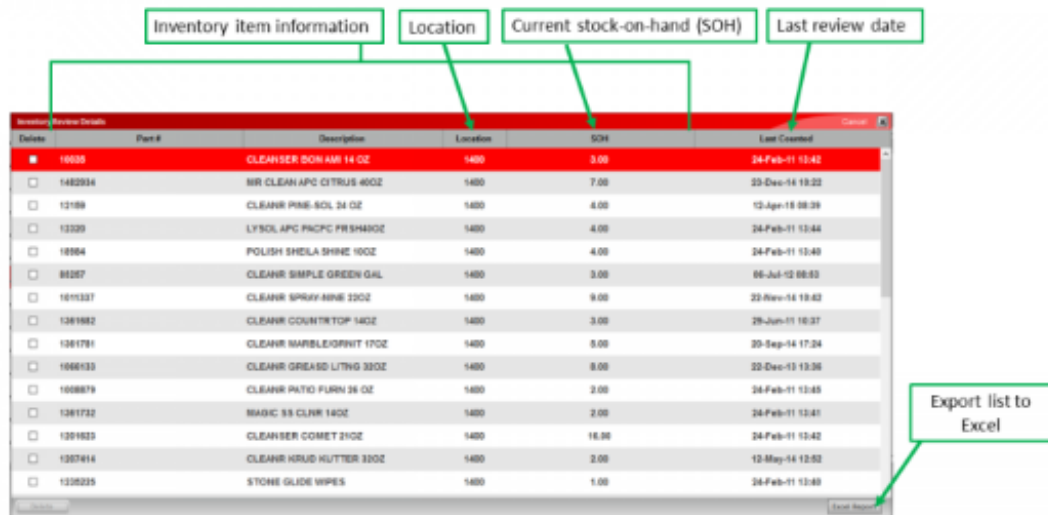
View option	Values	Description
Order By	<ul style="list-style-type: none">• Location [default]• Department	Shows unreviewed inventory by location or department.
Display By	<ul style="list-style-type: none">• # of items [default]• % of items	Shows unreviewed inventory amounts as a number or percentage of all items in the location or department.
Review after	Number of days backward in time [default: 180]	Shows inventory that was not reviewed in this time period.
Limit to Supplier	List of suppliers [default: 0-None]	Shows information for selected supplier only.
Sort by column values	N/A	Click any column title to sort the list by those column values.

Investment Reviewer Tips



- Sort the list so that the largest number of unreviewed items appears first. To sort the list by number of unreviewed items:
 - From the **Display By:** options, select **# of items**.
 - Click the **# of items to Review** column title until the largest number appears on top.
- After you complete a department or location inventory review, make sure that department or location no longer appears in the Investment Reviewer.

Investment Reviewer Details



Part #	Description	Location	SOH	Last Created
14029	CLEANSER DON AM 14 OZ	1400	3.00	24-Feb-11 13:42
1402934	WR CLEAN APC CITRUS 40OZ	1400	7.00	23-Dec-14 19:22
12189	CLEANR PINE-SOL 24 OZ	1400	4.00	13-Apr-18 08:39
12320	LYSOL APC PACFC FRSHANDZ	1400	4.00	24-Feb-11 13:44
10984	POLISH SHEILA SHINE 10OZ	1400	4.00	24-Feb-11 13:40
80267	CLEANR SIMPLE GREEN GAL	1400	3.00	06-Jul-12 00:03
101537	CLEANR SPRAY-AINE 23OZ	1400	9.00	22-Nov-14 19:02
1261982	CLEANR COUNTRTOP 14OZ	1400	3.00	26-Jun-11 10:37
1261781	CLEANR MARBLEOPWIT 17OZ	1400	5.00	20-Sep-14 17:24
1006133	CLEANR GREASE LITNG 33OZ	1400	8.00	22-Dec-13 13:36
1008879	CLEANR PATO FLRN 26 OZ	1400	2.00	24-Feb-11 13:45
1261732	MAGIC 93 CLRNR 14OZ	1400	2.00	24-Feb-11 13:41
1201803	CLEANSER COMET 21OZ	1400	16.00	24-Feb-11 13:42
1207414	CLEANR KRUD MUTTER 33OZ	1400	2.00	12-May-14 12:52
1202235	STONE GLIDE WIPES	1400	1.00	24-Feb-11 13:40

- **Investment Reviewer Details** – The details you need to start a review.
- To see a list of the out-of-date items for a location or department, click the magnifying glass to open the **Investment Reviewer Details** window.
- This window provides details for each unreviewed item in a department or location. The illustration, left, shows out-of-date items in a location along with an explanation of the information you see.
- **Tip:** Click the magnifying glass, or double-click anywhere in the part number field, to open that part in the Inventory module for additional details. When you close the part record, you'll return to your previous place in the Investment Reviewer Details window.

Getting Started



- The following steps illustrate how to use the Investment Review Tool to effectively manage your inventory.
 - Step 1: Plan your review schedule
 - Step 2: Choose the departments or locations that you want to review
 - Step 3: Print or save the item lists for each department or location
 - Step 4: Perform the review (PaladinGo App)
 - Step 5: Make sure you found everything

Watching your investment



- You must review your inventory to make your money work for you and to address items that are not performing.
- Over time, items may be moved or shifted, bin tags may be removed, prices may not be updated in the system, and items may scan incorrectly
- Customers expect items to be displayed neatly and labeled with the correct description and price. If items are not checked periodically, the customer experience suffers, and so does your business.
- The **Investment Review** tool tells you the percentage (%) of items that have not been recently reviewed and identifies them to keep your inventory investment robust.

Learn More

To learn more, see the following resources in our [Help Portal](#)

[PaladinNsight™: Boost your business](#)

[PaladinNsight™](#)

[PaladinNsight™: Take charge of your inventory investment with the Investment Review Tool](#)

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

Next Webinar:

PaladinNsight™: Stop Lost Items from Draining Your
Bottom Line

June 30

9am PT

<https://portal.paladinpos.com/webinars/>



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