WEBINARS

PALADIN DATA CORPORATION™

FREE ADVANCED TRAINING

Introducing the latest and greatest enhancements to Paladin Point of Sale

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PALADIN™
DATA CORPORATION

- Turn quotes into orders
- Raise money for local or national charities
- Use Mobile2Checkout (yes, it's available)
- Simultaneously handle two Rx systems with our enhanced pharmacy integration
- Integrate with Triple E and Fuel Master systems
- Deposit checks automatically with ACH automatic deposits
- Empower your RepeatRewards program with enhanced search and sign up options
- Insert new line items and notes anywhere on the invoice
- Add precision to line-items
- Skip signatures on E2E and EMV payment terminals
- Export customer sales history details into Excel
- Export Transaction Report data into Excel

Turn quotes into orders

- New order management feature
- Sells partial orders and resave
- Tracks sales against original order
- Autofills remaining item orders

Round Up for Charity

- Participation is voluntary.
  - When prompted, the cashier can ask the customer is s/he wants to donate.
  - The customer makes the decision.
- Add up to 4 charity options.
- Donations are indicated on the revenue report.
- A *thank you* note appears on the receipt.

Use Mobile2Checkout

- Available now for Android. Contact Customer Service.

- Sell anytime, anywhere.

- Accept multiple tender types, including cash, check, debit/credit cards, gift cards, and charge on account.

- Store orders or discounts as a quote, and then do in-store checkout.

- Can do basic sales and returns (but not pricing plans or trade discounts).

Integrate two different Rx systems simultaneously

RX30 Integration

Enable RX30 Integration	☑
RX30 Communication Port	4444
Require ID on Pickup	☐
Enable RX30 AR Integration	☐
Enable RX30 Logging	☐

Pharmacy Web Service Integration 1

Enable Pharmacy COM 1	☑
Pharmacy COM Name	Pharmacy
Pharmacy COM Address	http://pk_compounder/PaladinPharmacyCOMv1/
Pharmacy COM Timeout (ms)	3000
Enable Customer Available Credit	☐
Enable Send Full Invoice	☐
Enable GetRxItems (Bag Checkout)	☐
Enable Pharmacy COM Logging	☑

- Compounding Rx prescriptions and retail Rx prescriptions must be scanned to separate invoices.

- Over the counter (OTC) items can be scanned in either invoice.

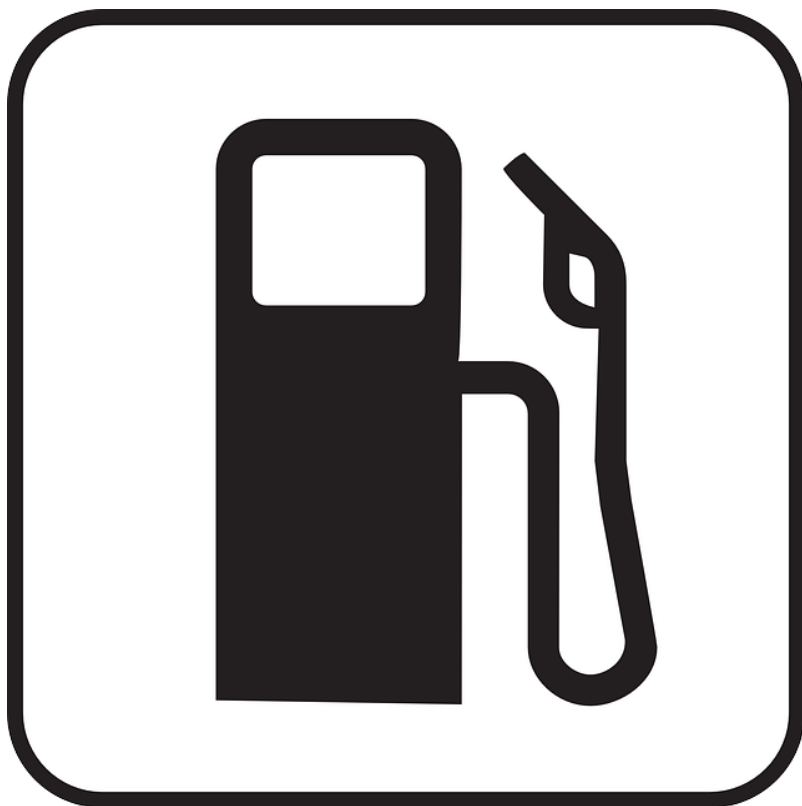- Supports standard and customized bi-directional integrations.

Integration with Triple-E and Fuel Master systems

- Combines all fuel sales with Paladin Point of Sale.
- Daily uploads occur with built-in EDI functionality.
- Supports all tender types and charge accounts.
- Adds fleet card charges to customer's Accounts Receivables.
- Identifies the user ID or card number on the receipt and invoice of the card holder.

Deposit checks automatically with ACH automatic deposits
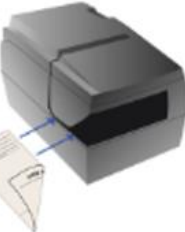
- Save time and seamlessly process checks with electronic bank account deposits.

- Transfers the transaction amount overnight by using the customer's bank account information on file or check information entered at checkout.

- Paladin offers two electronic check deposit integrations:
  - **Wells Fargo ACH electronic payments**
  - **Vantiv eCheck**. (You do not have to use Vantiv as a credit card processor to use this service.)

- When the **Check Processing** window appears, scan the check with your endorsement printer, and the information will be autofilled. If you do not have an endorsement printer, you must manually enter the information.

Empower your RepeatRewards program with enhanced options

- In the **Invoice/Quote** module, when you search for a RepeatRewards member by ID or phone number, the search occurs in both the Paladin Point of Sale and Repeat Rewards member databases.

- In the **Customers** module, sign up new and existing accounts through Paladin Point of Sale and/or Repeat Rewards.

- In the **Invoice** module, just click **Sign up**.

- Contact information will be synchronized in real time with RepeatRewards.

Insert new line items and notes anywhere on the invoice

- Right-click to activate the list window, which includes the following options:
  - Insert Line Item
  - Delete Line Item (F3)
  - Insert Note
  - Add Precision
  - Profit Analyst (Alt+A)
  - Footage Calculator (CTRL+K)

Add precision to line items

Right-click to see the list options, and then select **Add Precision**.

- Extends *Quantity* up to 4 decimal points.

- Extends *Price* up to 6 decimal points.

- Shows the new price.

- Adds a note.
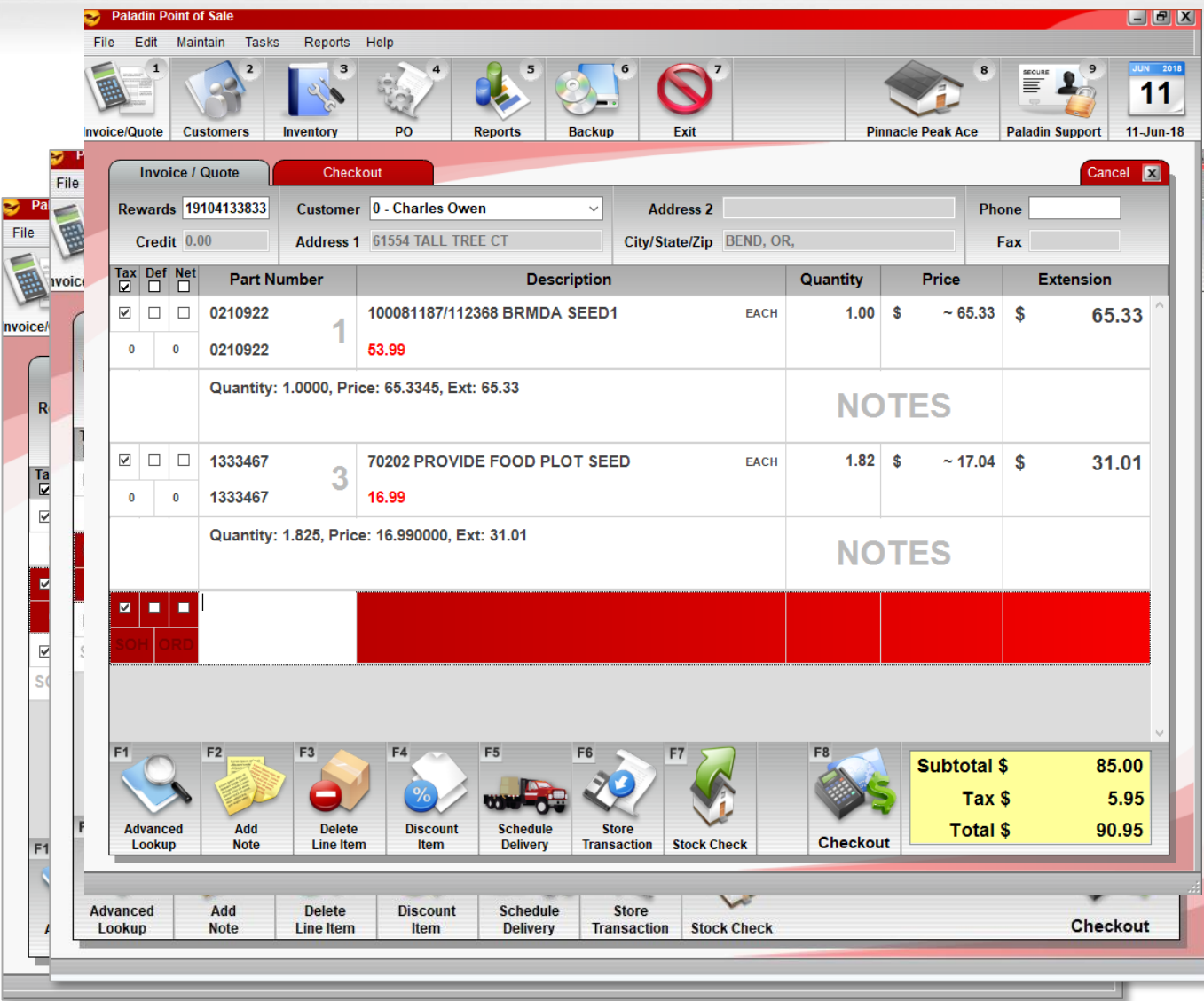
Skip signatures on E2E and EMV payment terminals

1. On the **File** menu, click **Setup**, and then click the **Credit Cards** tab.

2. The **Signatures** section, select any of the following options:

   • **Enable No-Signature Threshold**

   • **No Signatures for Purchases Under $**

   • **Enable Auth Signr for Credit Cards on File**

   • **Allow Signature to be Skipped**

Export customer sales history details into Excel

- In the **Invoice/Quote** module, select **Customer**, go to **Advanced Lookup,** and then search **All Invoices**.

- To see all part number quantities consolidated, click **Report Summary.**

- To see all individual part numbers and quantities itemized, click **Report Detail**.

- This is a great way to sort customer purchase history and track specific part number sales.

Export Transaction Report data into Excel

Reports

Cancel ❌

Choose a Report Area and then select a specific report from the Report List. Review the description to ensure the report is the one you wish to run and click on Next to enter the criteria.

Transaction Report - Excel Cancel ❌

① ▼ Report Settings

Selection	Beginning	Ending
Invoice Date*	11-Jun-18	11-Jun-18

*Select a date range of 31 days or less

② ▼ Additional Settings

Show invoice notes ☐

③ ▼ Sorting Options

There are no sorting options for this report

F12 Run Report

How to print detailed transaction reports to an Excel spreadsheet.

1. In the **Reports** module, in the **Report Area** pane, select **Sales Analysis**, and then select **What I need to Know.**

2. In the **Report List** pane, select **Transaction Report – Excel**.

3. Cick **F12—Ne**xt.

4. In **the Report Settings** pane, enter a date range of one month or less.

5. Slice and dice the data as you wish.

Learn more

To learn more, see the following resources in our <u>Help Portal</u>:

- <u>Turn quotes into orders with the new Order Manager</u>
- <u>Save time with automatic electronic check deposits</u>
- <u>Supercharge your RepeatRewards program with new search and sign up features</u>
- <u>Inspire community giving with the Charity Round Up feature</u>
- <u>New Triple E fuel system integration</u>
- <u>About Round Up for Charity</u>
  - o <u>How to set up the Round Up for Charity feature</u>
  - o <u>How to use the Round Up for Charity feature to collect donations</u>
  - o <u>How to view charitable contribution totals in the Comparative Revenue Reports</u>
- <u>WEBINAR: Encourage giving with the Round Up for Charity feature</u>
- WEBINAR: Introducing the latest and greatest enhancements to Paladin (coming soon)

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

Recording available at:

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