



*PALADIN DATA CORPORATION™*

# WEBINARS



*FREE ADVANCED TRAINING*



## Introducing the latest and greatest enhancements to Paladin Point of Sale

Charles Owen, Paladin



**PALADIN™**  
DATA CORPORATION



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Introducing the latest and greatest enhancements



- 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



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## Turn quotes into orders

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Pinnacle Peak Ace 9 Paladin Support 11-Jun-18

Order Manager Checkout Cancel

Rewards 12345678903 Customer 1 - BROGAN CONTRACTING Address 2 P.O. Box 123 Phone 9019917929

Credit 7,000.00 Address 1 2230 E BUNKER HILL PL City/State/Zip MEMPHIS, TN, 38103

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0010793	A-3 EXPANDABLE ELEC FENCE GA	EACH	15.29	\$ 0.00
0	0	0	0010793	Quote: 2 Sold: 0			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0244996	50079 FENCE STAPLE 1-1/4 25#	EACH	0 \$ 51.29	\$ 0.00
0	0	0	0244996	Quote: 2 Sold: 0			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	010001	SAFETY FENCE, 4'X50' 12# OR	EACH	0 \$ 8.72	\$ 0.00
2	0	0	010001	Quote: 4 Sold: 0			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0141572	9005-GA ASPHALT FENCEPOST PAI	EACH	0 \$ 39.59	\$ 0.00
0	0	0	0141572	Quote: 10 Sold: 0			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0173351	WP25 WOOD FENCE INSULATOR	EACH	0 \$ 4.49	\$ 0.00
0	0	0	0173351	Quote: 33 Sold: 0			

F1 Advanced Lookup F2 Add Note F3 Delete Line Item F4 Displaying Open | All F5 Item History F6 Auto-fill Quantity F7 Stock Check F8 Checkout

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



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## Round Up for Charity

Invoice / Quote   Checkout   Cancel X

Rewards   Customer   Address 2   Phone   Fax





**Round up for charity**   Cancel X

Round up the invoice total for charity?

Ask the customer: Would you like to round up your invoice total to the nearest dollar and donate the additional amount charity?

Donation Amount: \$ 0.73

Select a charity:

- ☒  Smithville Fire Department
- ☐  American National Red Cross
- ☐  Smithville High School Jazz Band Fund Drive
- ☐  Smithville Chamber of Commerce

Donate [F8]   Skip

Item Type	Amount
AMOUNT DUE	\$ 24.27
Payment	
F8	
Subtotal \$	22.89
Tax \$	1.38
Total \$	24.27

- Participation is voluntary.
  - When prompted, the cashier can ask the customer if 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.



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## 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).





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## Integrate two different Rx systems simultaneously

**RX30 Integration**

Enable RX30 Integration ☒

RX30 Communication Port

Require ID on Pickup ☐

Enable RX30 AR Integration ☐

Enable RX30 Logging ☐

**Pharmacy Web Service Integration 1**

Enable Pharmacy COM 1 ☒

Pharmacy COM Name

Pharmacy COM Address

Pharmacy COM Timeout (ms)

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.



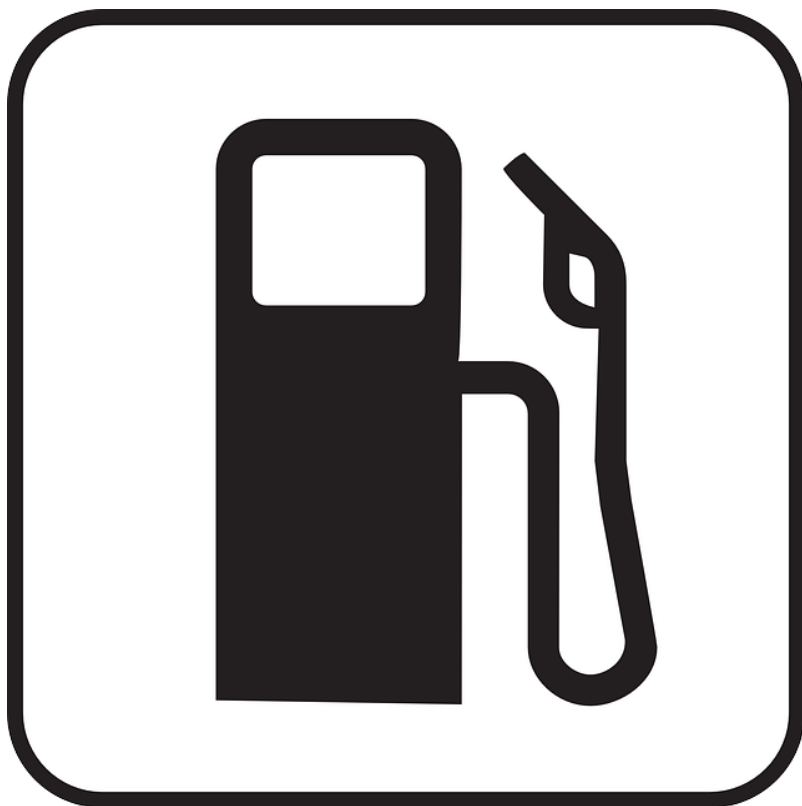
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## Integration with Triple-E and Fuel Master systems



- 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.



## Introducing the latest and greatest enhancements

# Deposit checks automatically with ACH automatic deposits

Invoice / Quote

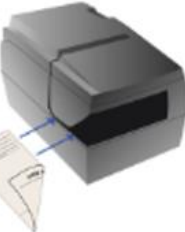
Checkout

Rewards 8765445678Customer 3160 - JOHN SMITH

Check Processing

Cancel

Enter check information for \$22.78 below...



Check #

1234

Routing #

325081403

Name

John Smith

Account #

11111111111

ACH Check Processing

Clear

Scan Check

Next >>

STEP 1

COMPLETE

- 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.





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## Empower your RepeatRewards program with enhanced options

The screenshot shows a software window titled "Rewards" with a red header bar containing a "Cancel" button and a close icon. Below the header is a tabbed interface with tabs for "Customers", "Credit", "Balances", "Electronic", and "RepeatRewards". The "Customers" tab is active, displaying fields for "Status: Active", "Customer" (a dropdown menu showing "3167 - MARY OWEN"), "Address 2", "Rewards" (a text field with "12345678"), "Address 1" (a text field with "100 Nice Street"), and "City" (a text field with "Somewhere"). Below these fields is a section titled "Customer Rewards Card" with a "Birth Date" field showing "Apr" and "12". A blue box highlights the "Birth Date" field. Below the "Customer Rewards Card" section is a "Type" dropdown menu, a "Birthday" field with two dropdown menus, and a "Phone 2" field. To the right of these fields are "Address", "Apt / Unit #", "City", "State" (a dropdown menu), "Zip Code" (a text field with "-"), and "Email Address" (a text field). A blue box highlights the "Type" dropdown menu and the "Birthday" field. At the bottom of the window are "Cancel" and "F12 Finish" buttons.

- 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.



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## Insert new line items and notes anywhere on the invoice

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Pinnacle Peak Ace 9 Paladin Support 11 JUN 2018 11-Jun-18

Invoice / Quote Checkout Cancel X

Rewards 19104133833 Customer 0 - Charles Owen Address 2 Phone  
Credit 0.00 Address 1 61554 TALL TREE CT City/State/Zip BEND, OR, Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0000 882 0710	SHEATH FOR PRUNERS EACH	1	\$ 11.99	\$ 11.99
0	0	0	0000 882 0710	11.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0000 882 0703	PL 40 LOPPER-32" HANDLE EACH	1	\$ 99.99	\$ 99.99
0	0	0	0000 882 0703	99.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0000 884 0513	CAMO HEARING PRO	1	\$ 27.99	\$ 27.99
1	0	0	0000 884 0513	27.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

☐ Insert Line Item  
☐ Delete Line Item (F3)  
☐ Insert Note  
☐ Add Precision  
☐ Profit Analyst (Alt + A)  
☐ Footage Calculator (Ctrl + K)

F1 Advanced Lookup F2 Add Note F3 Delete Line Item F4 Discount Item F5 Schedule Delivery F6 Store Transaction F7 Stock Check F8 Checkout

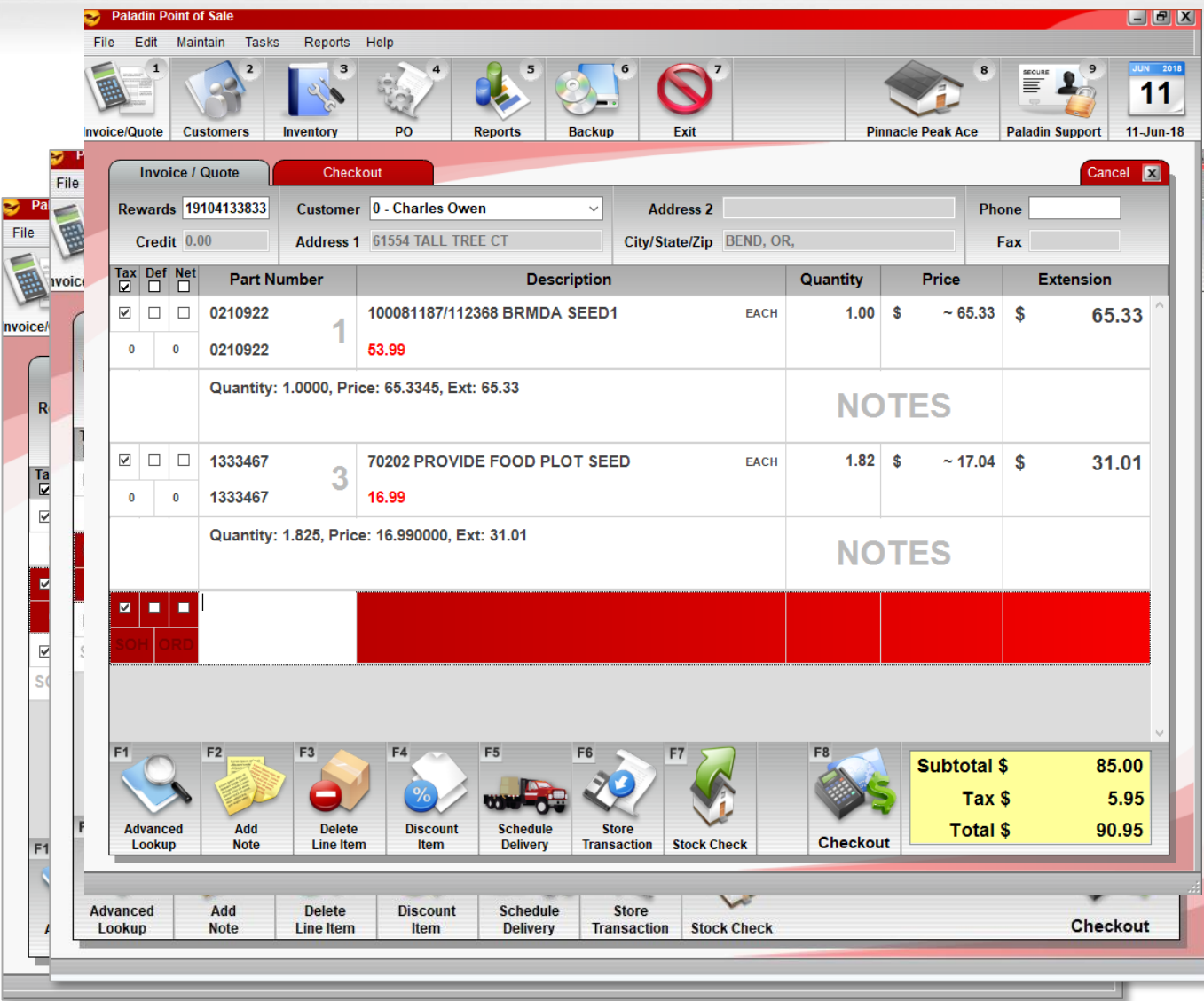
- Right-click to activate the list window, which includes the following options:
  - Insert Line Item
  - Delete Line Item (F3)
  - Insert Note
  - Add Precision
  - Profit Analyst (Alt+A)
  - Footage Calculator (CTRL+K)



## Introducing the latest and greatest enhancements

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.





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## Skip signatures on E2E and EMV payment terminals

Data Options

Months to Keep Invoice Signatures (0 to never delete)

Signatures

Enable No-Signature Threshold ☐

No Signatures for Purchases Under \$

Enable Auth Signer for Credit Cards on File ☐

Allow Signature to be Skipped ☐

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**



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## Export customer sales history details into Excel

The screenshot shows the 'Paladin Point of Sale' application window. The 'Advanced Lookup' window is open, displaying a list of sales history for customer 'BROGAN CONTRACTING'. The window has tabs for 'Inventory', 'Customer', 'History', and 'Special Order'. The 'History' tab is selected. The window shows a table of sales data with columns: Qty, Part Number, Description, Invoice #, Price Sold, Qty Sold, Date Sold, SOH, and Price. The first row is highlighted in red. Below the table, there are buttons for 'Report Summary' and 'Report Detail', both of which are circled in red. The 'Recent History' section at the bottom indicates that double-clicking a row provides more detailed transaction information.

Qty	Part Number	Description	Invoice #	Price Sold	Qty Sold	Date Sold	SOH	Price
0.00	10111	PAINTBRSH FOAM 2 JEN	416	\$1.07	1.00	22-May-18	11.00	\$1.19
0.00	NWSBN	BOX NAILS SMOOTH	411	\$0.45	-1.00	04-May-18	999.00	\$0.50
0.00	NATB8	GRADE 8 BOLTS	410	\$5.40	1.00	04-May-18	2,018.50	\$6.00
0.00	NATLB8	GR8 BOLT OVER 6IN	410	\$6.30	1.00	04-May-18	3,060.00	\$7.00
0.00	NWSBN	BOX NAILS SMOOTH	410	\$0.45	2.00	04-May-18	999.00	\$0.50
0.00	NWSDRS	DRYWALL R.SHANK	410	\$0.72	1.00	04-May-18	1,199.00	\$0.80
0.00	0483198	MLD356 VINE&LEAF MOULDING2	410	\$2.33	1.00	04-May-18	903.00	\$2.59
0.00	7338627	COMPRESSED PEAT PELLET	410	\$0.12	1.00	04-May-18	2,999.00	\$0.13
0.00	1494574	COOKING ODOR ELIMNTR10OZ	408	\$4.27	10.00	25-Apr-18	-6.00	\$4.99
0.00	1495738	43605 2PC SS RED TURNER & TO	408	\$17.99	2.00	25-Apr-18	1.00	\$19.99
0.00	1497478	PLIER GROOVE JOINT 10IN	408	\$7.82	1.00	25-Apr-18	9.00	\$8.69
0.00	22177	WRECKING BAR 3/4 X 30	408	\$7.19	1.00	25-Apr-18	14.00	\$7.99
0.00	LUM2	2X4X8 TREATED	408	\$3.87	1.00	25-Apr-18	201.94	\$3.87

**Recent History**  
Double-click a row for more detailed transaction information.

Report Summary Report Detail

F8: Add Items to Invoice

- 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.





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## Export Transaction Report data into Excel

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

\*Select a date range of 31 days or less

1 Report Settings

2 Additional Settings

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. Click **F12—Next**.
4. In the **Report Settings** pane, enter a date range of one month or less.
5. Slice and dice the data as you wish.



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## Learn more

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

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

A recording of this webinar will be available at [portal.paladinpos.com/webinars](http://portal.paladinpos.com/webinars).



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