

PALADIN DATA CORPORATION™

# Biz Coach Webinars



## Little known reports — Treasures buried within Paladin

Charles Owen

TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED





## Little known reports — Treasures buried within Paladin



- Goals of this presentation
- Types of reports in Paladin Point of Sale
- What's ODBC and why should I care?
- Revealing the unknown reports
- Bonus reports
- Learn more



## Little known reports — Treasures buried within Paladin

### Goals



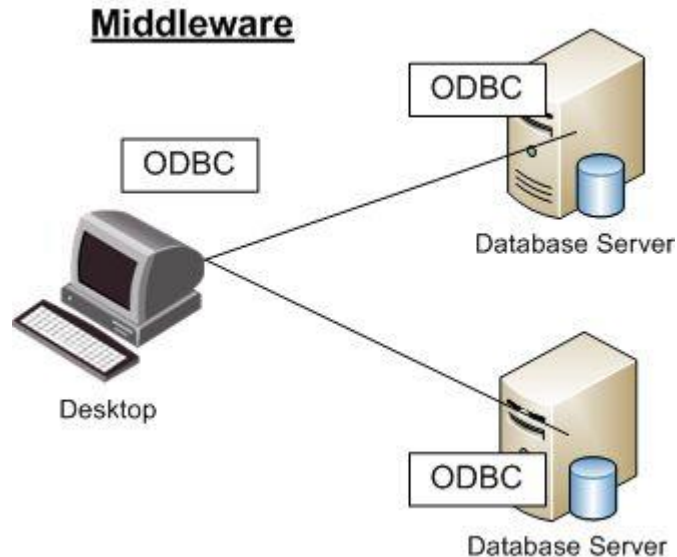
- Understand the different reporting capabilities within Paladin Point of Sale.
- Learn about unknown reports.
- Gain knowledge to help improve operations.





## Little known reports — Treasures buried within Paladin

### What's ODBC and why should I care?



- ODBC allows access to most fields in the Paladin database.
- Microsoft Excel works with the ODBC connector.
- Wizard-based reporting makes it a lot easier.
- ODBC can turn your data into intelligent information.



## Little known reports — Treasures buried within Paladin

### Revealing the unknown reports

Three unknown reports revealed:

1. All Items Report
2. Itemized Tax Exempt Transaction Report
3. Stop Meth Transaction Report

**CLASSIFIED**



## Little known reports — Treasures buried within Paladin

Suggested Order Report		
1 Report Settings		
Selection	Beginning	Ending
PartNumber	ALLITEMS	ALLITEMS
Department	1 - Housewares	1 - Housewares
Supplier	0	999999999
Class	0	999999999
SubClass	0	999999999
Location	0	999999999



## Little known reports — Treasures buried within Paladin

**Transaction Report**

**2** ▾ **Additional Settings**

Payment Method

Customer Name

Keyword Search

Detail Display  Customer friendly  Accounting Department

Search Invoice Amounts

Greater Than  Less Than  Equal To





## Little known reports — Treasures buried within Paladin

**Transaction Report**

2 Additional Settings

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### Bonus Reports



- Revenue Report by Customer Type
- Transaction Report by Projects/Jobs
- Items Sold Report – Replenishment ordering
- Hourly Analysis Report
- Inventory Count List:
  - Upside down margins – Retail pricing by category
  - Top 10 movers – Top 100 movers
  - Inventory assessment and review



## Little known reports — Treasures buried within Paladin

### Learn more

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

- [About creating reports](#)
- [How to set up a Scheduled Reports Start Time](#)
- [How to create the All Items Report](#)
- [How to create the Accounting Summary Report](#)
- [About the Items Sold Report](#)
- [How to open the SOH History viewer](#)
- [How to view customer invoices by project in the Transactions Report](#)
- [About Suggested Order Reports](#)
- [How to create the Itemized Tax Exempt Transaction Report](#)

#### Videos:

- [Custom reports using Excel & ODBC](#)
- [Custom reports using Microsoft Access](#)

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



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## Our next webinar

**Date:** Tuesday, February 28<sup>th</sup>, 2017      9:00am PST

**Title:** Your Register Balance -- The Daily Reckoning!

**Description:**

The end of another prosperous day. How did you do? Just looking at the raw sales numbers feels pretty good. Ah, but the true test will be to find out how well your cash, check, and credit card amounts match with the numbers point of sale has calculated. Discrepancies could point to problems that need to be addressed. Our presenter will show you how to use the "Today's Register Balance" report to prove how well things are working or be your little Sherlock if they're not.

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Recording available at:  
[portal.paladinpos.com/webinars](https://portal.paladinpos.com/webinars)

