



PALADIN DATA CORPORATION™

WEBINARS



FREE ADVANCED TRAINING



Introducing the latest and greatest enhancements to Paladin Point of Sale

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- Turn quotes into orders
- Raise money for local or national charities
- 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	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	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 FENCEPST PAI	EACH	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	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
- Sell partial orders and resave
- Track sales against original order
- Autofill 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	

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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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 ☒

- New ability to integrate fully with two different Rx systems.
- 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 a customer's Accounts Receivables.
- Records the card holder's user ID on the receipt and invoice.



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Deposit checks automatically with ACH automatic deposits

Invoice / Quote

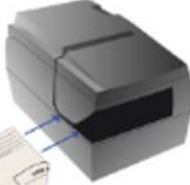
Checkout

Rewards 8765445678Customer 3160 - JOHN SMITH

Check Processing

Cancel

Enter check information for \$22.78 below...



Check #

1234

Name

John Smith

Routing #

325081403

Account #

1111111111

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 displays the 'RepeatRewards' software interface. At the top, a red header bar contains the title 'Rewards' and a 'Cancel' button. Below this, a tabbed interface shows 'Customers', 'Credit', 'Balances', 'Electronic', and 'RepeatRewards'. The 'Customers' tab is active, showing fields for 'Status: Active', 'Customer: 3167 - MARY OWEN', 'Address 2', 'Rewards: 12345678', 'Address 1: 100 Nice Street', and 'City: Somewhere'. A 'Customer Rewards Card' section is visible, with 'Birth Date' set to 'Apr 12'. Below this, a 'Type' dropdown menu and 'Birthday' fields are highlighted with a blue box. The 'Address' field is highlighted in yellow. Other fields include 'Apt / Unit #', 'City', 'State', 'Zip Code', and 'Email Address'. The 'Zip Code' field is also highlighted in yellow. At the bottom, there 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.
- New **Sign Up** button in the **Invoice/Quote** module when the selected customer does not have a RepeatRewards ID
- Contact information will be synchronized in real time with RepeatRewards.
- Birthday and customer type information can be saved with RepeatRewards.
- Sign up your customer with RepeatRewards in the **Customers** module.



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Insert new line items and notes anywhere on the invoice

The screenshot shows the 'Paladin Point of Sale' application window. The top menu bar includes File, Edit, Maintain, Tasks, Reports, and Help. Below the menu is a toolbar with icons for Invoice/Quote, Customers, Inventory, PO, Reports, Backup, Exit, Pinnacle Peak Ace, and Paladin Support. The main window displays an 'Invoice / Quote' form with fields for Rewards, Customer, Address 1, Address 2, City/State/Zip, Phone, and Fax. Below these fields is a table with columns: Tax, Def, Net, Part Number, Description, Quantity, Price, and Extension. The table contains three line items. A right-click context menu is open over the second line item, showing options: Insert Line Item, Delete Line Item (F3), Insert Note, Add Precision, Profit Analyst (Alt + A), and Footage Calculator (Ctrl + K). At the bottom of the window is a toolbar with function keys F1 through F8, each with an icon and a label: F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Discount Item, F5 Schedule Delivery, F6 Store Transaction, F7 Stock Check, and F8 Checkout.

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	1	\$ 11.99	\$ 11.99
0	0	0	0000 882 0710	11.99			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0000 882 0703	PL 40 LOPPER-32" HANDLE	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			

Right-click a line item and a new menu will appear with these options:

- Insert **SKU's** anywhere on invoices, quotes, and purchase orders.
- Insert **notes** anywhere on invoices, quotes, and purchase orders.
- Get easy access to Delete Line (F3), Profit Analyst (Alt+A), and Footage Calculator (CTRL+K) tools.

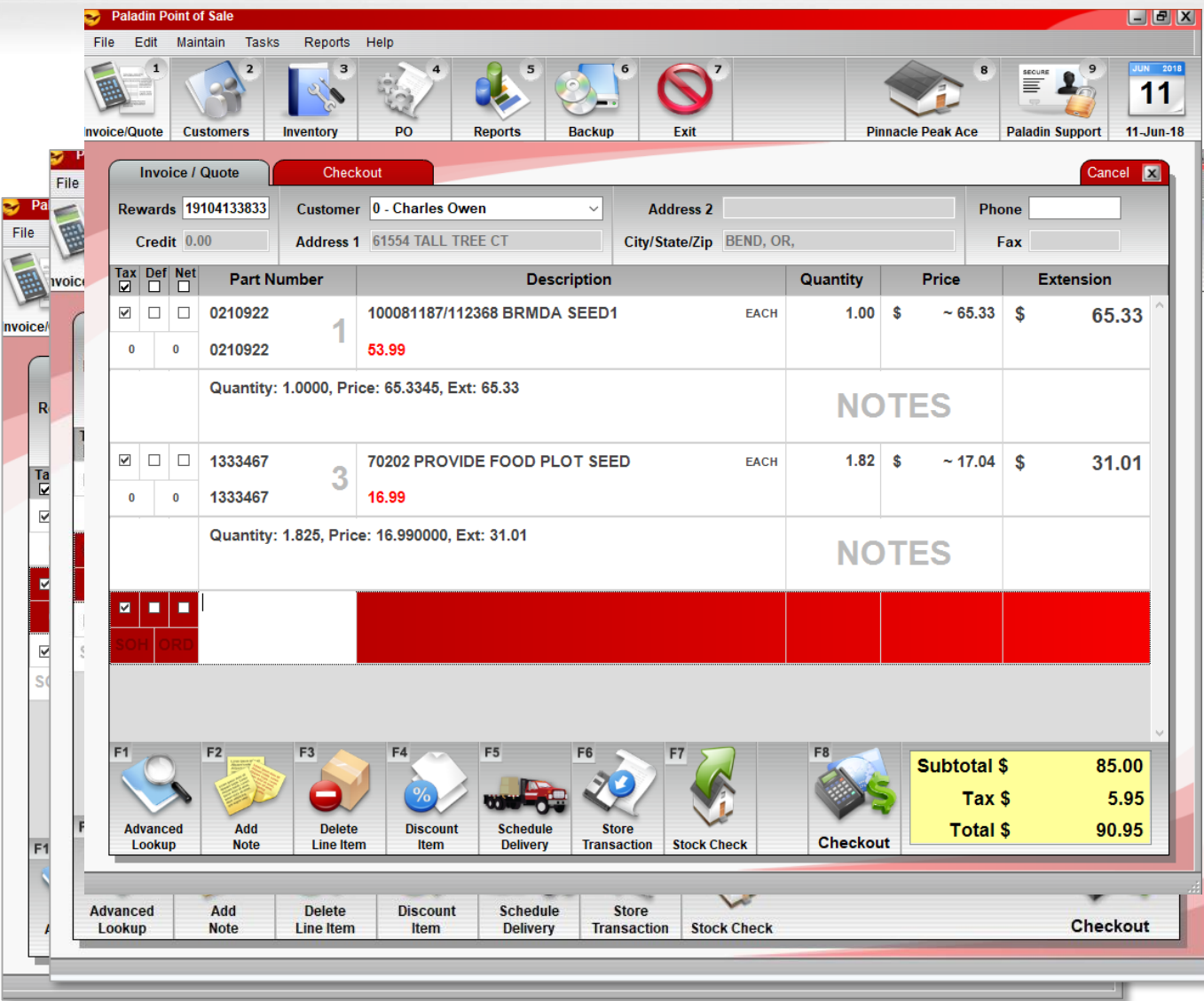


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Add precision to line items

Right-click a line item, and then click **Add Precision**.

- Increase **Quantity** precision up to 4 decimal points.
- Increase **Price** precision up to 6 decimal points.
- The **Extension** value shows the new price.
- When you are done, an invoice note shows the new line item values.





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Skip signatures on E2E and EMV payment terminals

Data Options

Months to Keep Invoice Signatures (0 to never delete) 36

Signatures

Enable No-Signature Threshold ☐

No Signatures for Purchases Under \$ 0.01

Enable Auth Signer for Credit Cards on File ☐

Allow Signature to be Skipped ☐

Reset Save

1. On the **File** menu, click **Setup**, and then click the **Credit Cards** tab.
2. In the **Signatures** pane, select from these features:
 - Enable a no signature threshold and set the dollar amount
 - Allow signatures to be skipped on all payments
 - Bonus: Show an authorized signers window for account customers charging to credit cards.
3. Click **Save**.



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Export customer sales history details into Excel

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 2 3 4 5 6 7 8 9 11

Inventory Customer History Special Order

Customer: BROGAN CONTRACTING ☐ Invoice ☐ Part ☐ Part + Customer ☐ Invoice Reprint

Invoice: All Invoices... Find >>

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 SOVER 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 a **Customer**, click **Advanced Lookup**, click the **History** tab, and then perform an **All Invoices** search.
- 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

Reports

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

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 export detailed transaction reports into an Excel spreadsheet.

1. In the **Reports** module, in the **Report Area** pane, click **Sales Analysis**, and then click **What I need to Know**.
2. In the **Report List** pane, click **Transaction Report – Excel**.
3. Click **F12—Next**.
4. In the **Report Settings** pane, enter a date range of one month or less, and then click **F12 Run Report**.
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](#)

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



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portal.paladinpos.com/webinars

