PALADIN DATA CORPORATION™

WEBINARS

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
- 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
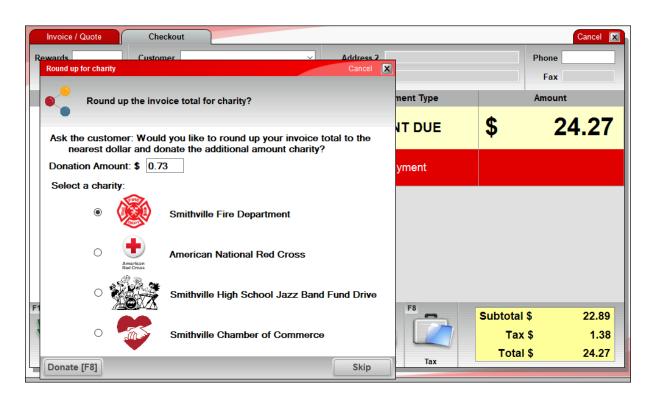- Export Transaction Report data into Excel

Turn quotes into orders

- New order management feature
- Sell partial orders and resave
- Track sales against original order
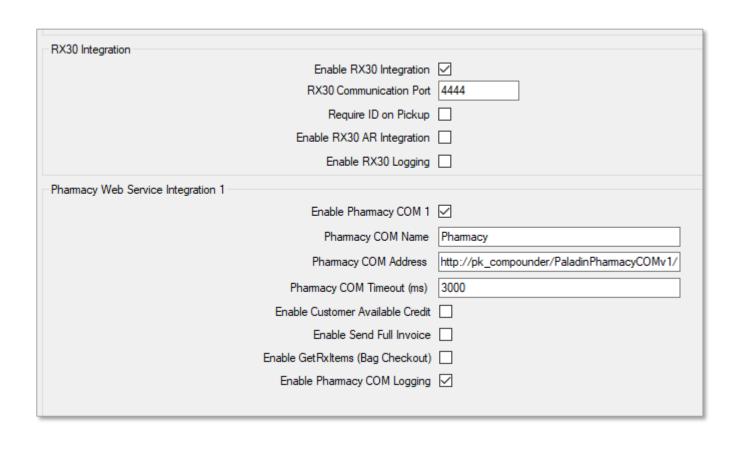- Autofill remaining item orders

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.
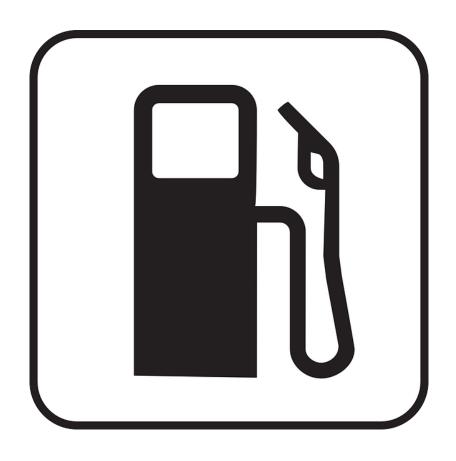- A *thank you* note appears on the receipt.

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	☑

- 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.

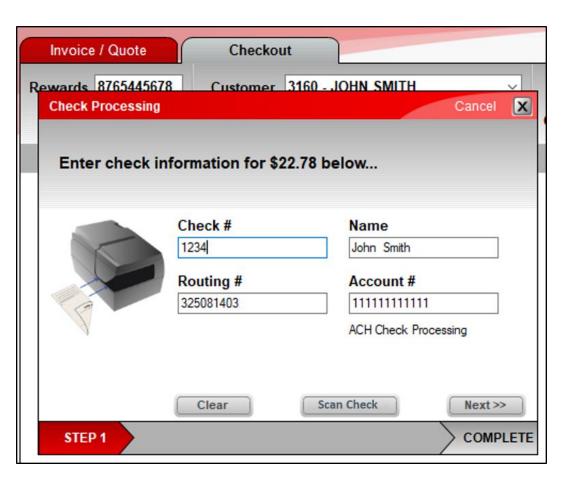- Supports standard and customized bi-directional integrations.

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.
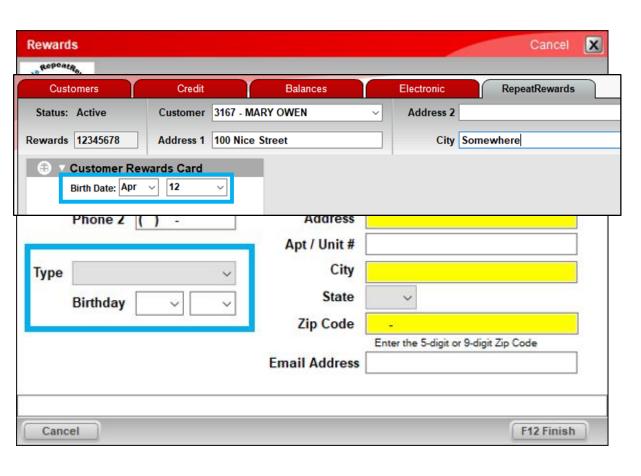- Records the card holder's user ID on the receipt and invoice.

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.
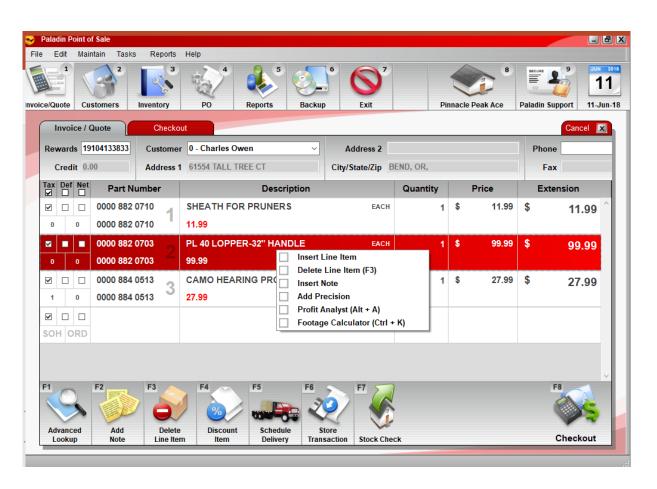
Empower your RepeatRewards program with enhanced options

- 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.

- 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.
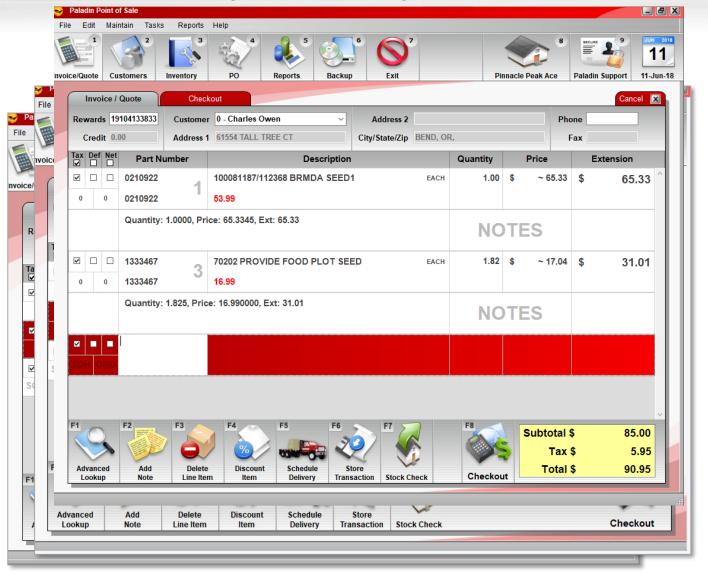
Insert new line items and notes anywhere on the invoice

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.
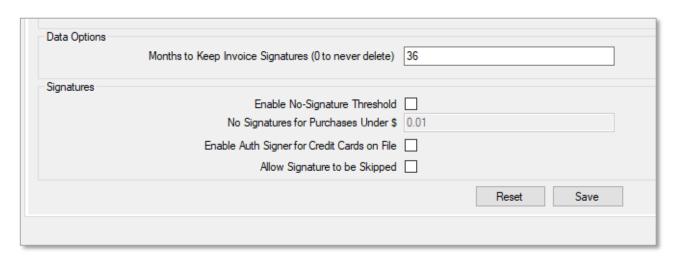
Add precision to line items

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.

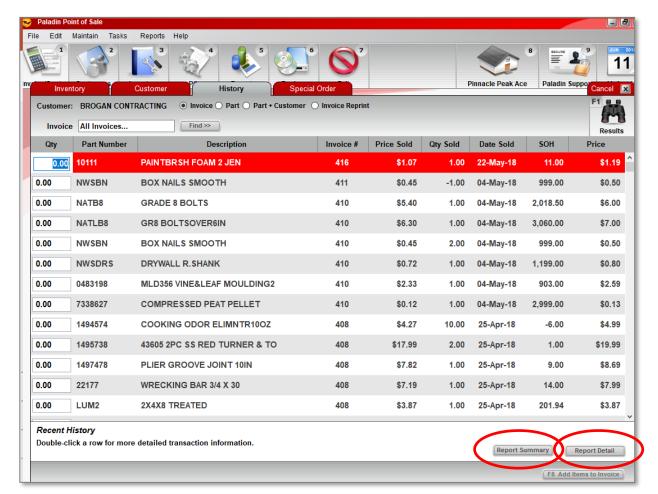- When you are done, an invoice note shows the new line item values.

Skip signatures on E2E and EMV payment terminals

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.
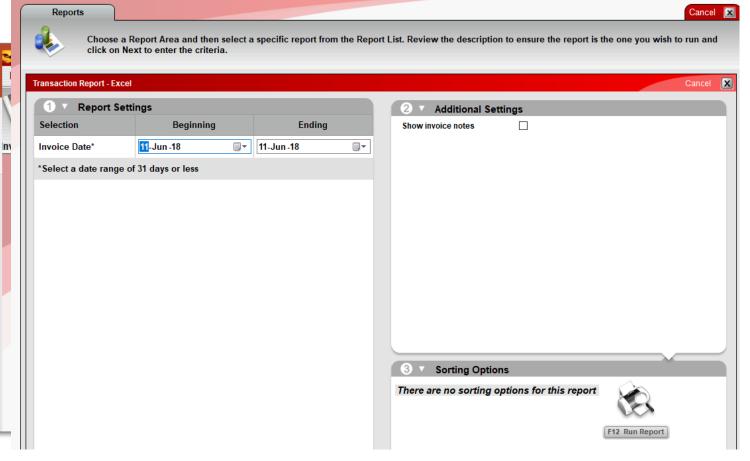
3. Click **Save**.

Export customer sales history details into Excel

- 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.

Export Transaction Report data into Excel

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. Cick **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.

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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