



# Virtual User Meeting – Fall 2020



Charles Owen

*Chief Experience Officer*

September 30, 2020

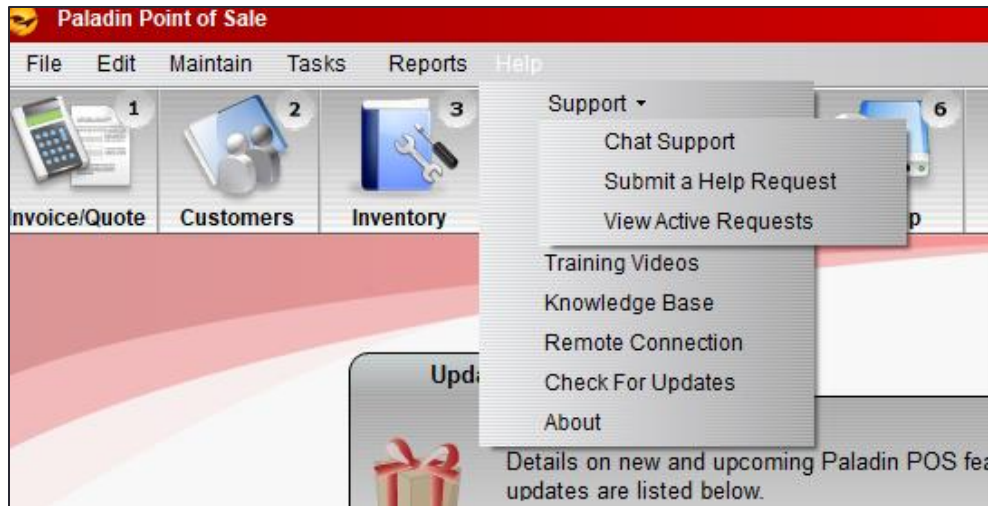
## ***WHAT YOU'LL LEARN***

The Summer 2020 Release includes:

- The new Help Request Portal
- Integrations for firearms and accounting
- Expanded mobile device support and apps
- New Point of Sale features
- New True Value features

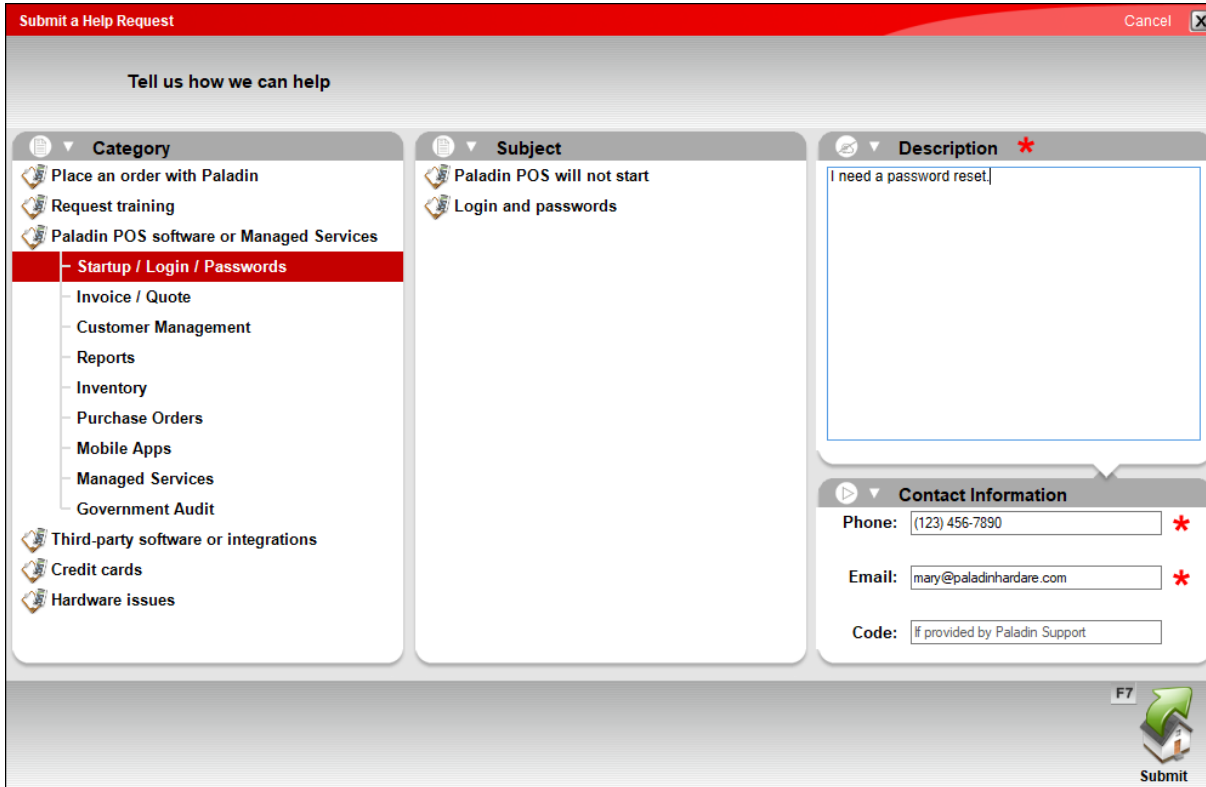
# The New Help Request Portal

## The new Help menu category: “Support”



- A new **Support** category on the **Help** menu provides access to **Chat Support** and the new **Help Request Portal**.
- **Submit a Help Request** replaces the “Open a New Case” menu option which opened in a browser window. This new Help Request Portal is integrated into Paladin.
- **View Active Requests** replaces the “My Cases” page on the Help Portal website. This feature also opens in Paladin.

## Submit a Help Request



The screenshot shows a web form titled "Submit a Help Request" with a red header bar. Below the header, the text "Tell us how we can help" is displayed. The form is divided into three main sections: "Category", "Subject", and "Description".

- Category:** A list of categories is shown, with "Startup / Login / Passwords" selected and highlighted in red. Other categories include "Place an order with Paladin", "Request training", "Paladin POS software or Managed Services", "Invoice / Quote", "Customer Management", "Reports", "Inventory", "Purchase Orders", "Mobile Apps", "Managed Services", "Government Audit", "Third-party software or integrations", "Credit cards", and "Hardware issues".
- Subject:** A list of subjects is shown, with "Paladin POS will not start" and "Login and passwords" selected. Other subjects include "Paladin POS software or Managed Services", "Invoice / Quote", "Customer Management", "Reports", "Inventory", "Purchase Orders", "Mobile Apps", "Managed Services", "Government Audit", "Third-party software or integrations", "Credit cards", and "Hardware issues".
- Description:** A text area containing the text "I need a password reset".

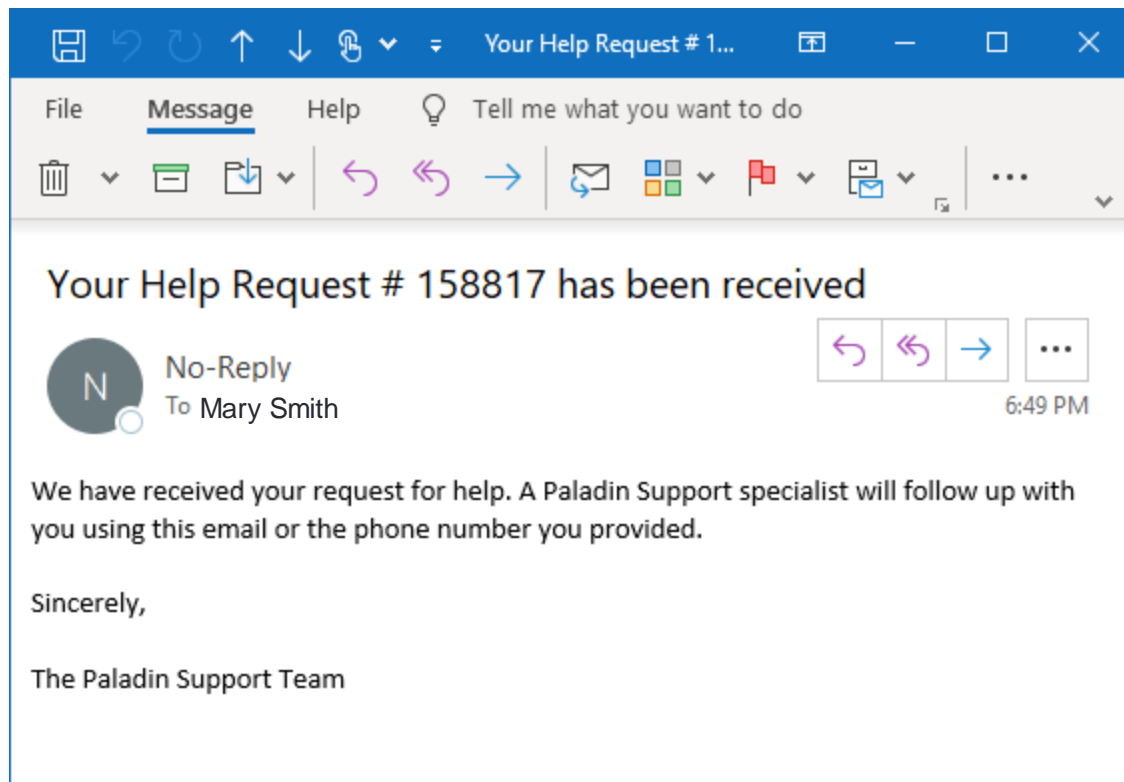
Below these sections is a "Contact Information" section with three fields:

- Phone:** A text field containing "(123) 456-7890".
- Email:** A text field containing "mary@paladinhardare.com".
- Code:** A text field containing "If provided by Paladin Support".

At the bottom right of the form, there is a green arrow icon with the text "F7" above it and the word "Submit" below it.

- Select a **Category** and **Subject** that best fit your issue. Accurate selections will expedite your request.
- Enter a detailed **Description** and a contact **Phone** and **Email**.
- Attachments can be added after you submit the request using **Help > Support > View Active Requests**

## Help Request Confirmation Email



- After you submit a new Help Request, you will receive a Help Request ID.
- This ID will also be sent to the contact email address you entered.

## The new Help Request Portal makes Paladin Support even better

You'll experience even more efficient and responsive support due to these enhancements:



- Fully-integrated into Paladin and automatically collects vital data about your unique system when help is request.
- Categories quickly direct your request to the most knowledgeable support team.
- Our products and customer service are continually optimized based on the data we collect.

# New integrations



## FastBound integration



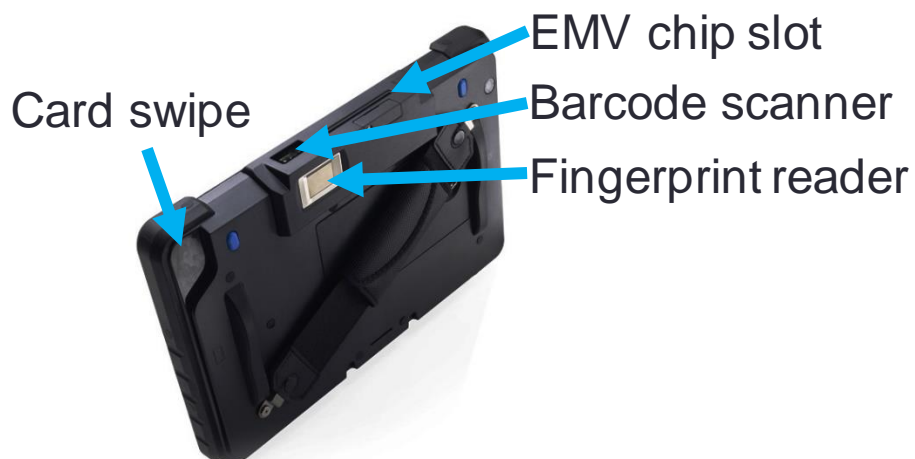
- Simplify the complicated process of selling firearms with the FastBound integration.
- Guaranteed compliance for firearm acquisition and disposition (A&D), an electronic 4473, and an electronic bound book with FastBound's FFL software.
- Receive and sell firearms in Paladin while simultaneously updating FastBound A&D and your electronic bound book.

# QuickBooks Online integration



- QuickBooks integration now supports the online version
- Sync the day's general ledger activity summary to your QuickBooks Online general ledger each night.
- Automatically create an accounts payable invoice from a purchase order, minutes after you receive new product and close a purchase order in Paladin.

Expanded mobile device support and apps



## Touch Dynamic Quest III Tablet

- Take the power of Paladin with you anywhere on your business network with this agile 10-inch Windows tablet
- Use all Paladin features including inventory management, EDI, purchase orders, pricing plans/sale lists, quotes and customer sales
- Barcode scanner and EMV enabled. Runs Office 365 and other Windows programs.
- EMV Level 3 certified. Compatible with WorldPay and DataCap. Supports signature capture.
  - Does not support credit card transactions with PIN.
- Connect your store's database, printers and other peripherals via your store's WIFI



Card reader

## Samsung Galaxy Tab Active 2

- Android device optimized for Mobile2Checkout and many other partner applications
- Sell anytime and anywhere with an internet connection (cellular or WIFI)
- Collect signatures and process payments
- Optional uDynamo card reader available for swipe purchases
- Compact 8-inch form factor makes device easy to hold and use
- Rugged tablet with water-resistant S Pen and screen

## Ingenico Lane 7000/8000 payment terminals



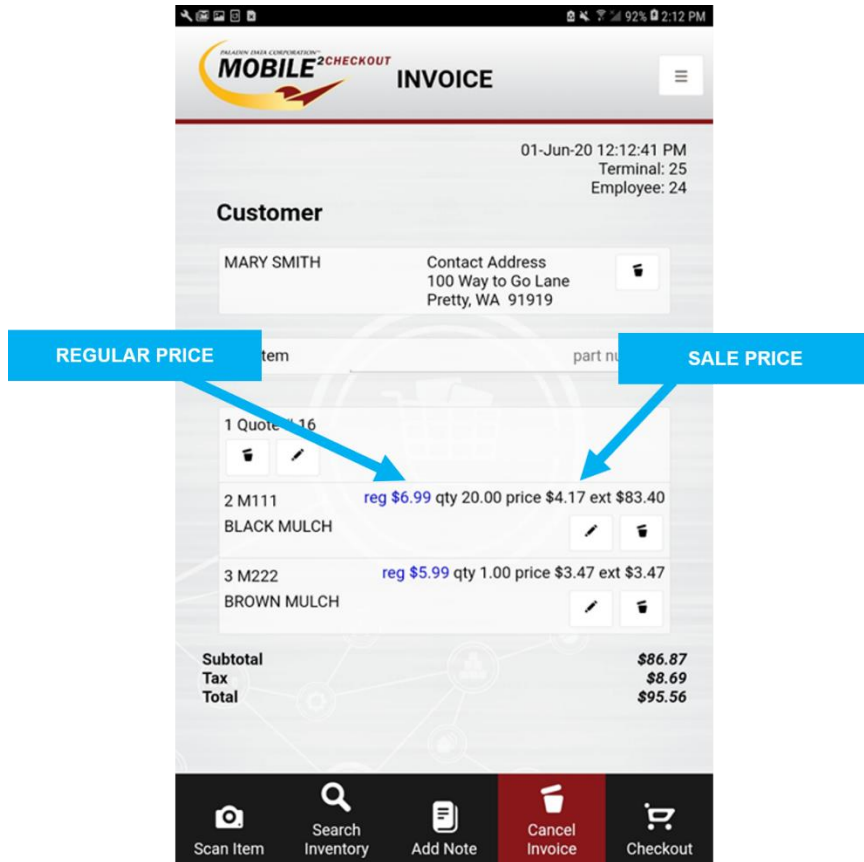
- User-friendly, multimedia touchscreen payment processors with built-in signature capture PIN pad.
- Accept all major payment types, including touchless, and features a stylus for quick signature capture.

## Verifone P400 payment terminals



- Upgrade for the Verifone VX 805.
- Nimble and customizable checkout device.
- Features a conventional pin pad and a color touchscreen that can display video, product images or special offers.
- New user interface makes customer checkout quick and easy.
- Certified for WorldPay EMV.

## Mobile2Checkout app

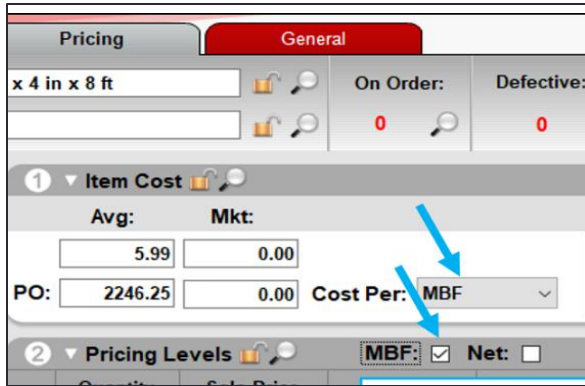


- Works on most newer Android devices
- Sell anytime, anywhere
- Accept multiple tender types, including cash, check, debit/credit cards, gift cards, and charge on account
- Store orders and process returns.
- **NEW!** Recall stored quotes.
- **NEW!** Respect pricing plans and trade discounts.
  - Loyalty program sales and points are not currently supported.
- Requires version 1.1.1 or higher



## New Point of Sale features

## Show MBF, MSF and Ton prices on quotes/invoices



**Pricing General**

x 4 in x 8 ft

On Order: 0 Defective: 0

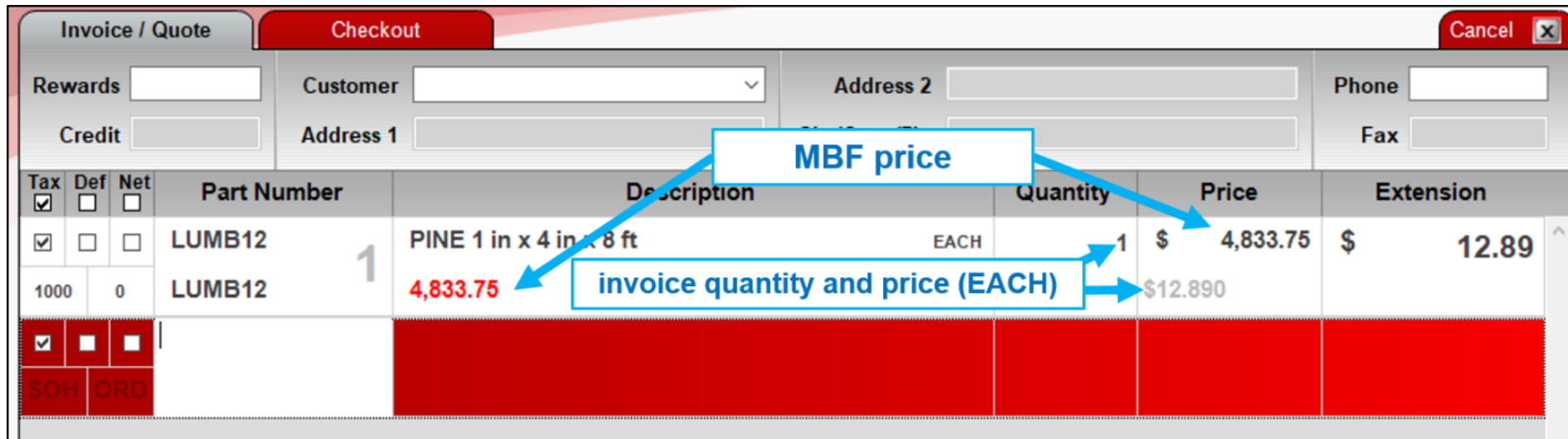
1 Item Cost

Avg: 5.99 Mkt: 0.00

PO: 2246.25 Cost Per: MBF

2 Pricing Levels MBF: ☒ Net: ☐

- A new inventory setting (checkbox) lets you show prices in thousand board feet (MBF), thousand square feet (MSF) or ton on invoices and quotes.
- To turn on, select the **MBF**, **MSF** or **TON** checkbox. (**Cost Per:** must be set to unit first.)



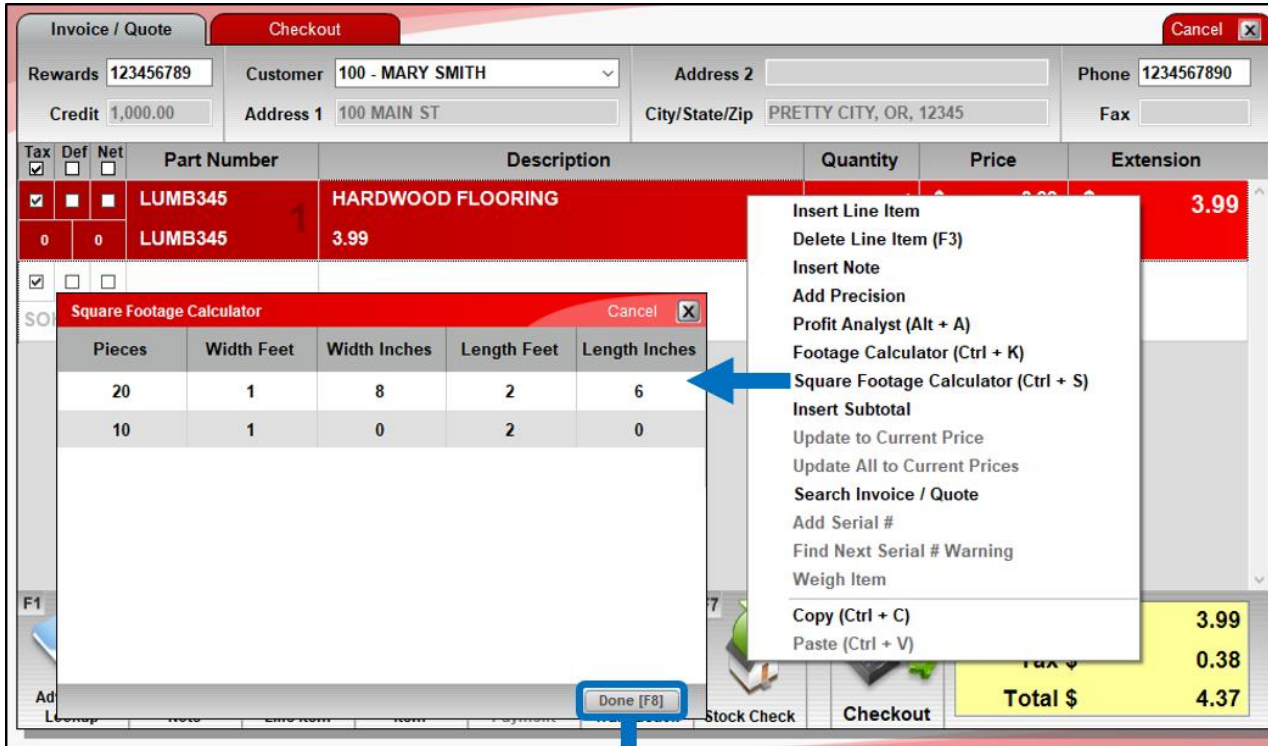
**Invoice / Quote Checkout**

Rewards Credit Customer Address 1 Address 2 Phone Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB12	PINE 1 in x 4 in x 8 ft EACH	1	\$ 4,833.75	\$ 12.89
1000	0		LUMB12			\$12.890	

SOH ORD

# Square Footage Calculator



Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING	1		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	3.99			
20@1-8.00X2-6.00 10@1-0.00X2-0.00				NOTES			

- Calculate square foot quantities for an invoice item based on dimensions (width/length) and # pieces that you enter.
- Quantities are recorded in a note.
- Right-click the item to access the calculator from the Quick Access menu or press Ctrl + S

## Numbered quotes

Invoice / Quote

Checkout

Rewards

Credit 0.00

Customer 100 - MARY SMITH

Address 1 100 MAIN ST

Tax	Def	Net	Part Number	Des
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quote # 6	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21095	6 X 5/8 PH FL WOOD
4	0		21095	1.29
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21090	4X1/2 PH FL WOOD S

Thanks for shopping with us!

Your Local Hardware Store

123-456-7890

MARY SMITH  
100 MAIN ST  
PRETTY CITY, OR 12345  
1234567890 ACCOUNT #: 100

ITEM	QTY	SALE/REG	EXT
Quote # 6			
21095	5.00	1.29	6.45
EACH			
6 X 5/8 PH FL WOOD SC ZN			
21090	10.00	1.29	12.90

Recall Transaction

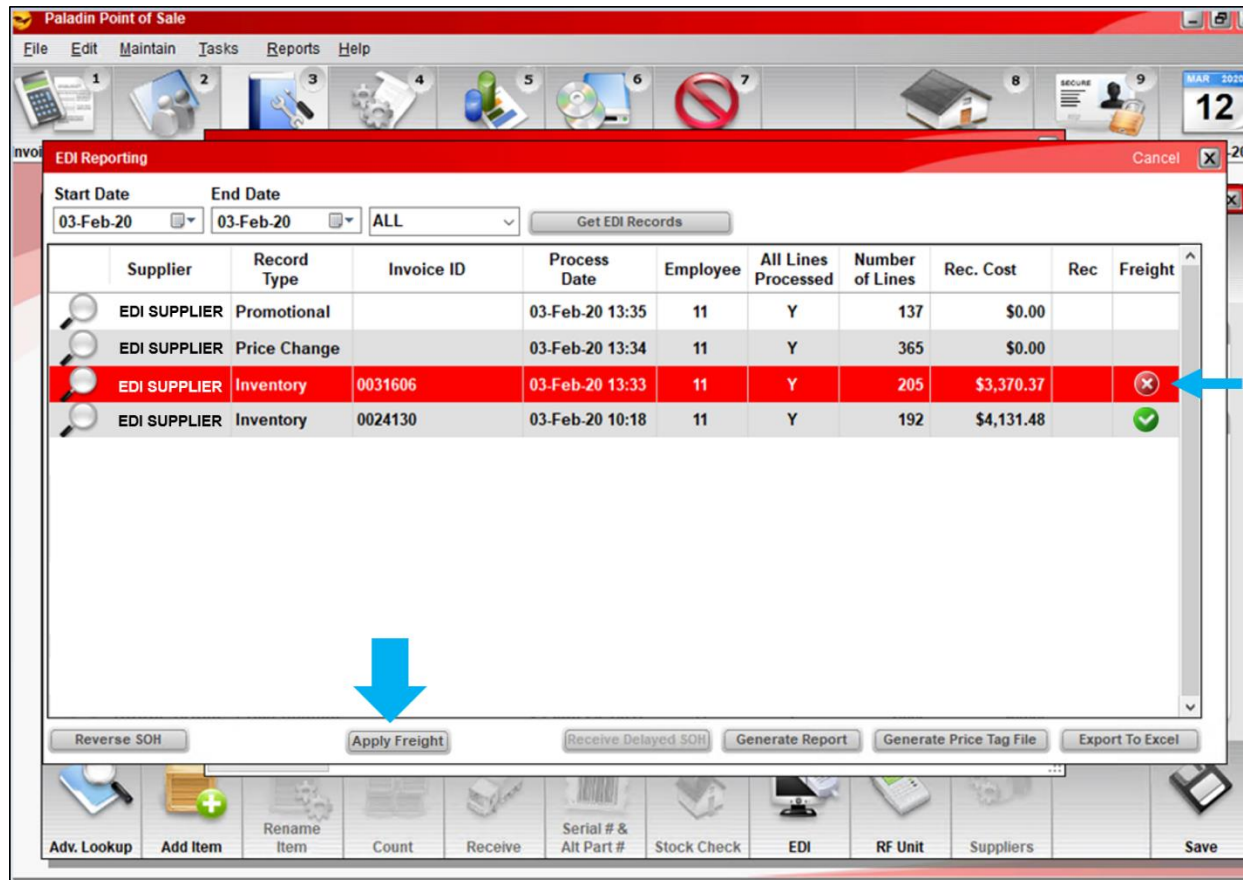
☐ Suspended Sale
 ☒ Quote — Order
 ☐

☐ Show for all customers

Name	Memo
Mary Smith	Quote # 6: Office remodel

- Incremental quote numbers can be automatically added for easy reference.
- Find quotes quickly by number when your customer is ready to buy.
- Turn on quote numbers in **File > Setup > Invoice (Store)** tab, select **Enable Quote Numbers**.

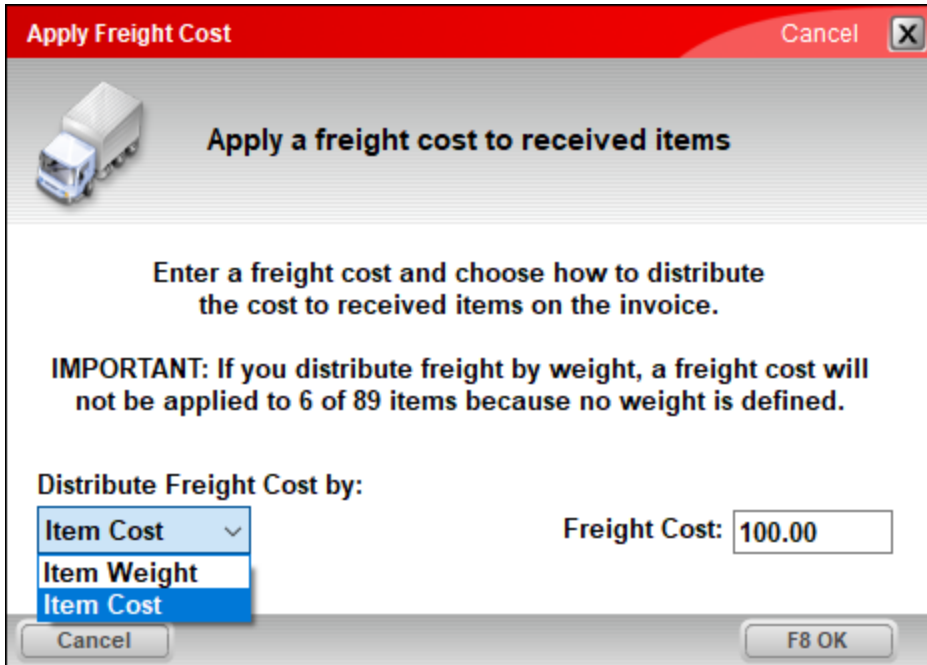
## Apply freight cost to EDI invoice items



- Apply a freight cost to an EDI invoice and then distribute the cost across its received items in the **EDI Reporting** window.
- Freight column icons identify invoices that are eligible for a freight cost (✗) and invoices where freight has been applied (✓).

This feature is already available for manual receiving.

## Apply freight cost to EDI invoice items



Apply Freight Cost

Cancel

Apply a freight cost to received items

Enter a freight cost and choose how to distribute the cost to received items on the invoice.

IMPORTANT: If you distribute freight by weight, a freight cost will not be applied to 6 of 89 items because no weight is defined.

Distribute Freight Cost by:

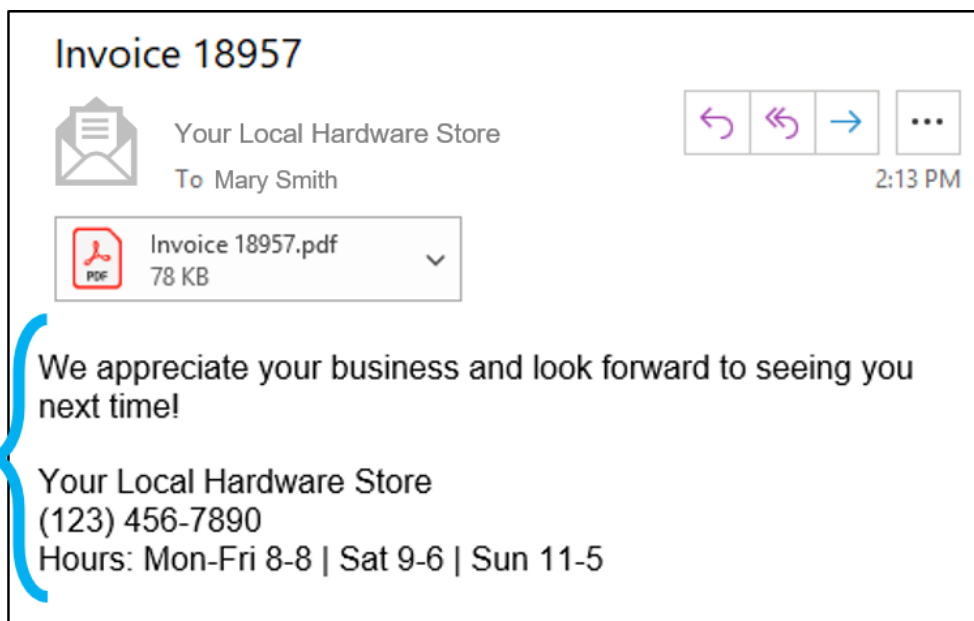
Item Cost  
Item Weight  
Item Cost

Freight Cost: 100.00

Cancel F8 OK

- Freight costs can be distributed by item cost or item weight.
- **Tip** It's a best practice to apply freight cost soon after the EDI invoice is processed and before received items are sold.

## Customized email invoice messages

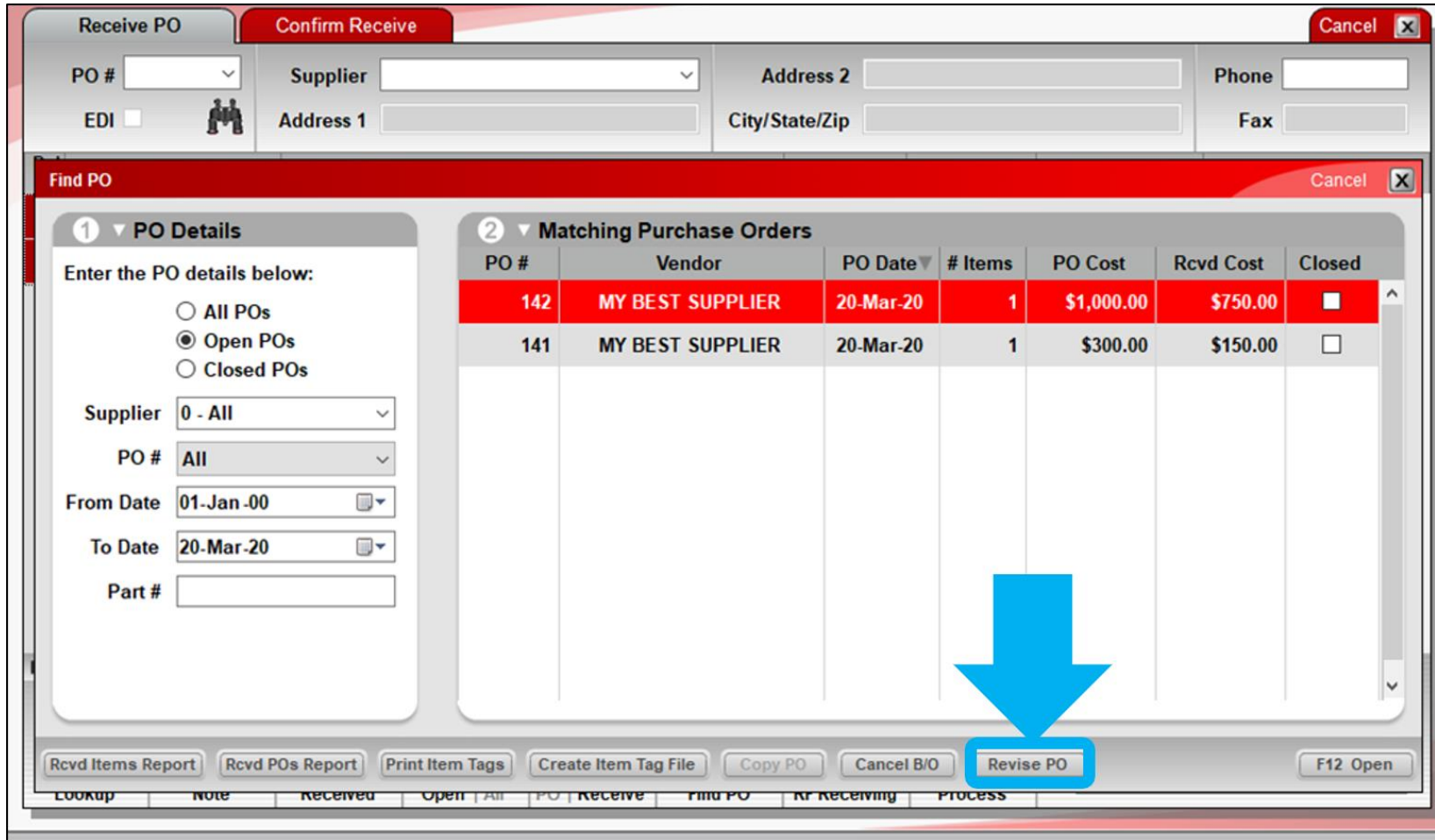


Custom  
Message

- Add custom message, your store hours, a note about upcoming promotions or other custom text when your client opts for an email invoice.
- Enter your text in **File > Setup > Forms tab > Email Message** box.



## Create a new purchase order for backordered items



Receive PO | Confirm Receive | Cancel

PO #  Supplier  Address 2  Phone   
 EDI ☐ Address 1  City/State/Zip  Fax

**Find PO** Cancel

**1 PO Details**

Enter the PO details below:

☐ All POs  
☒ Open POs  
☐ Closed POs

Supplier   
 PO #   
 From Date   
 To Date   
 Part #

**2 Matching Purchase Orders**

PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
142	MY BEST SUPPLIER	20-Mar-20	1	\$1,000.00	\$750.00	<input checked="" type="checkbox"/>
141	MY BEST SUPPLIER	20-Mar-20	1	\$300.00	\$150.00	<input type="checkbox"/>

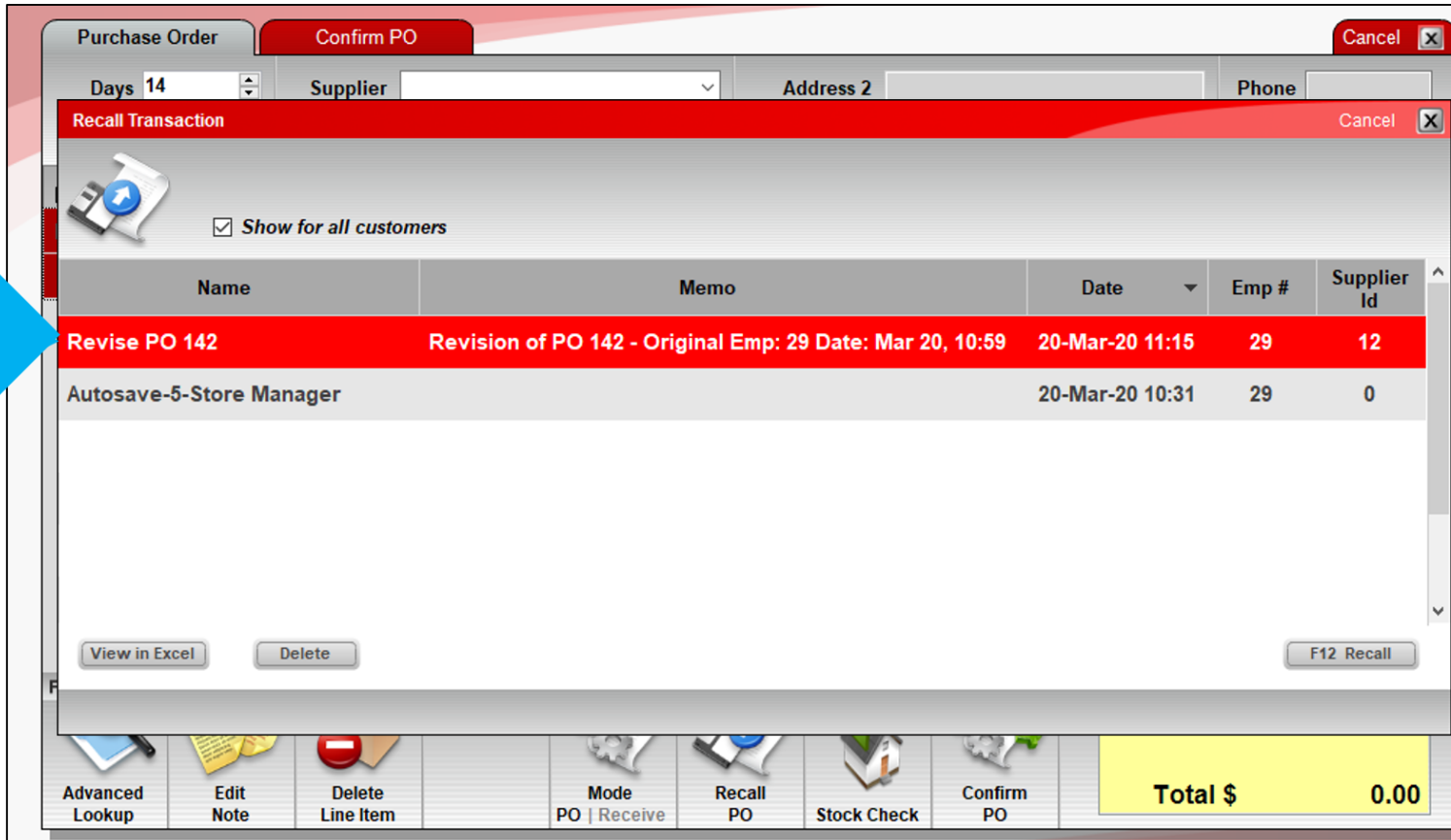
Rcvd Items Report | Rcvd POs Report | Print Item Tags | Create Item Tag File | Copy PO | Cancel B/O | **Revise PO** | F12 Open

- Create a new purchase order form a PO with backordered items.
- The existing PO will be closed and a new PO created for the backordered items.
- To access this feature, use **Find PO** to locate the purchase order and then click **Revise PO**.



## Create a new purchase order for backordered items

- The new PO name is prefixed with “Revise PO” and contains the prior PO’s #.
- It appears automatically in the **Recall Transaction** window.



Purchase Order

Confirm PO

Days 14

Supplier

Address 2

Phone

Recall Transaction

☒ Show for all customers

Name	Memo	Date	Emp #	Supplier Id
Revise PO 142	Revision of PO 142 - Original Emp: 29 Date: Mar 20, 10:59	20-Mar-20 11:15	29	12
Autosave-5-Store Manager		20-Mar-20 10:31	29	0

View in Excel

Delete

F12 Recall

Advanced Lookup

Edit Note

Delete Line Item

Mode PO | Receive

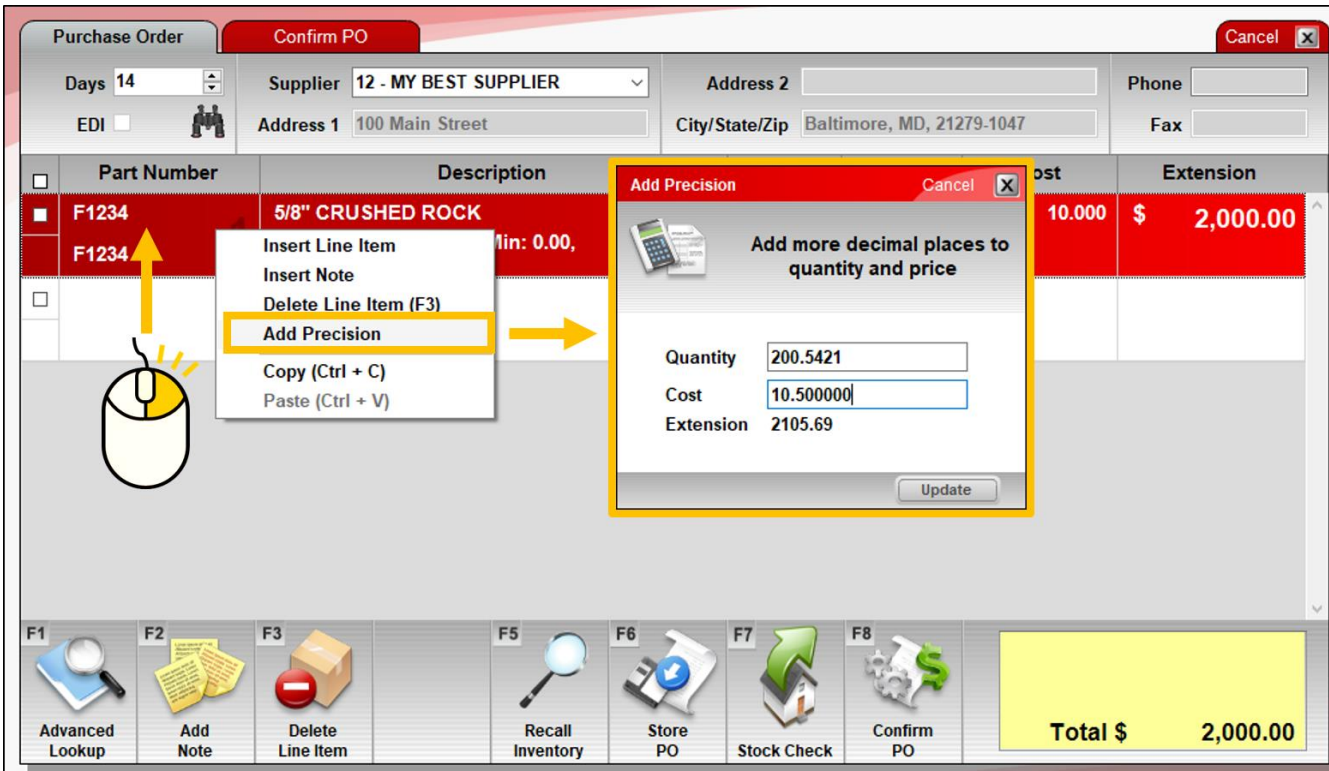
Recall PO

Stock Check

Confirm PO

Total \$ 0.00

## Add precision to PO quantity and price



The screenshot shows a 'Purchase Order' window with a 'Confirm PO' tab. The window includes fields for 'Days' (14), 'Supplier' (12 - MY BEST SUPPLIER), 'Address 1' (100 Main Street), 'City/State/Zip' (Baltimore, MD, 21279-1047), 'Address 2', 'Phone', and 'Fax'. A table lists line items with columns for 'Part Number', 'Description', 'Min', 'Cost', and 'Extension'. The first line item is 'F1234' with description '5/8" CRUSHED ROCK', 'Min: 0.00', 'Cost: 10.000', and 'Extension: 2,000.00'. A right-click context menu is open over the first line item, with 'Add Precision' highlighted. An arrow points from this menu to the 'Add Precision' dialog box. The dialog box has fields for 'Quantity' (200.5421), 'Cost' (10.500000), and 'Extension' (2105.69), with an 'Update' button at the bottom. A toolbar at the bottom contains icons for 'Advanced Lookup' (F1), 'Add Note' (F2), 'Delete Line Item' (F3), 'Recall Inventory' (F5), 'Store PO' (F6), 'Stock Check' (F7), and 'Confirm PO' (F8). A yellow box at the bottom right shows 'Total \$ 2,000.00'.

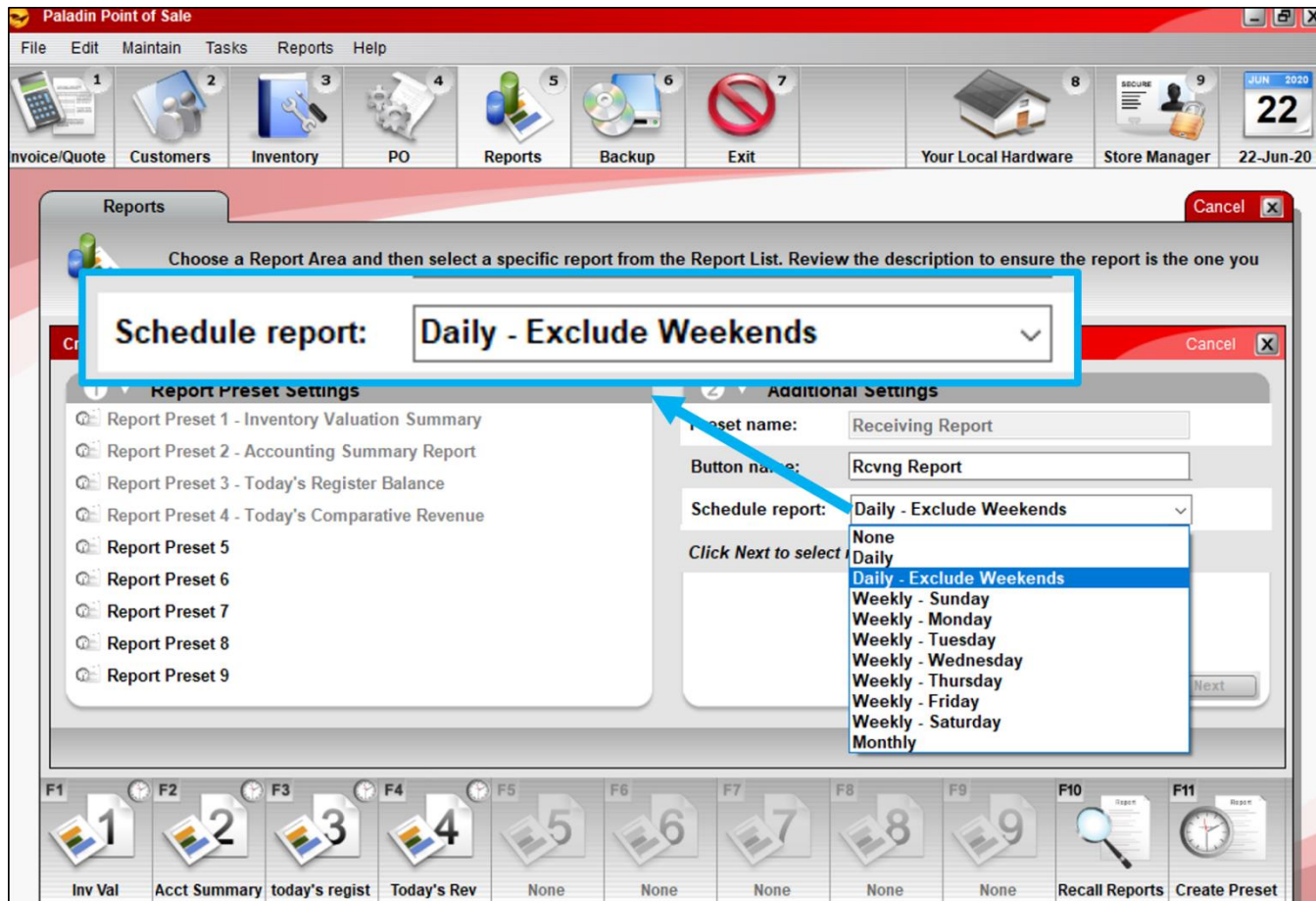
Part Number	Description	Min	Cost	Extension
F1234	5/8" CRUSHED ROCK	0.00	10.000	2,000.00

Quantity: 200.5421  
Cost: 10.500000  
Extension: 2105.69

Total \$ 2,000.00

- Add decimal places to line item quantities and prices on purchase orders.
- To add more precise values, right-click the line item and select **Add Precision** from the Quick Access menu.

## Schedule reports for weekday only



Schedule reports to run on weekdays only with a new **Daily – Exclude Weekends** option.

# Excel version of the Credit Card Deposit Report

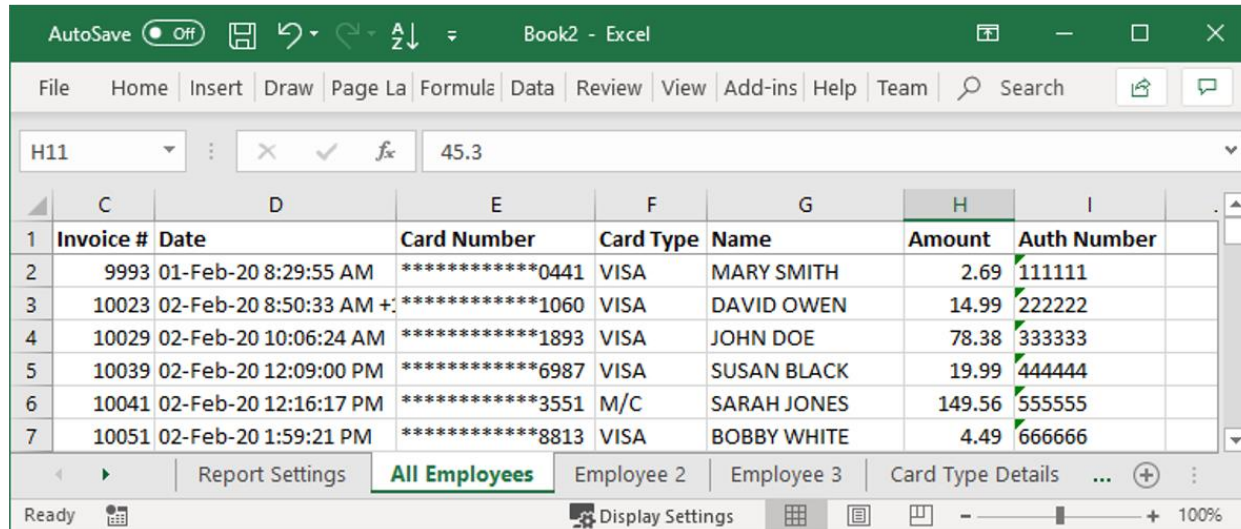
Credit Card Deposit

1 Report Settings

Selection	Beginning	Ending
InvoiceDates	02-Feb-20	02-Feb-20

SearchBy    ☐ Terminal    ☒ Employee

Export to Excel?    ☒



The screenshot shows an Excel workbook titled "Book2 - Excel" with the following data in the "All Employees" worksheet:

Invoice #	Date	Card Number	Card Type	Name	Amount	Auth Number
9993	01-Feb-20 8:29:55 AM	*****0441	VISA	MARY SMITH	2.69	111111
10023	02-Feb-20 8:50:33 AM	*****1060	VISA	DAVID OWEN	14.99	222222
10029	02-Feb-20 10:06:24 AM	*****1893	VISA	JOHN DOE	78.38	333333
10039	02-Feb-20 12:09:00 PM	*****6987	VISA	SUSAN BLACK	19.99	444444
10041	02-Feb-20 12:16:17 PM	*****3551	M/C	SARAH JONES	149.56	555555
10051	02-Feb-20 1:59:21 PM	*****8813	VISA	BOBBY WHITE	4.49	666666

- View and analyze credit card transactions easily with a new Excel option.
- The Excel workbook includes separate worksheets (tabs) for each employee or terminal, depending on the option you choose.

## “Customer Friendly” Transaction Report

- View a **Customer Friendly** version of the Excel Transaction Report that omits department, cost and margin data.
- If you want the original view, select **Accounting Department**.

Transaction Report - Excel Cancel

1 Report Settings - limited to a maximum of 31 days		
Selection	Beginning	Ending
Invoice Date*	16-Jul -20	16-Jul -20
PartNumber		ZZZZZZZZZZ
Terminal	0	000000000

2 Additional Settings	
Show invoice notes	<input type="checkbox"/>
Skip account payments	<input type="checkbox"/>
Detail Display	<input checked="" type="radio"/> Customer friendly <input type="radio"/> Accounting Department

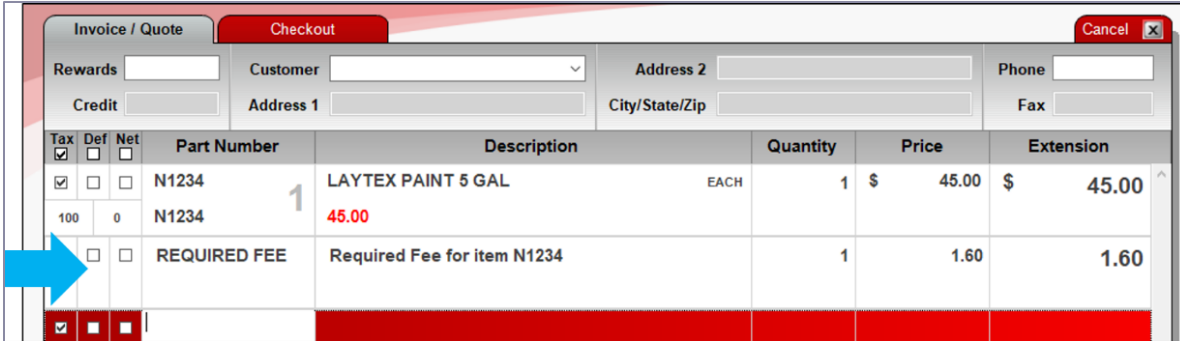
## EMV stores: Swipe credit cards to put them on-file in Paladin



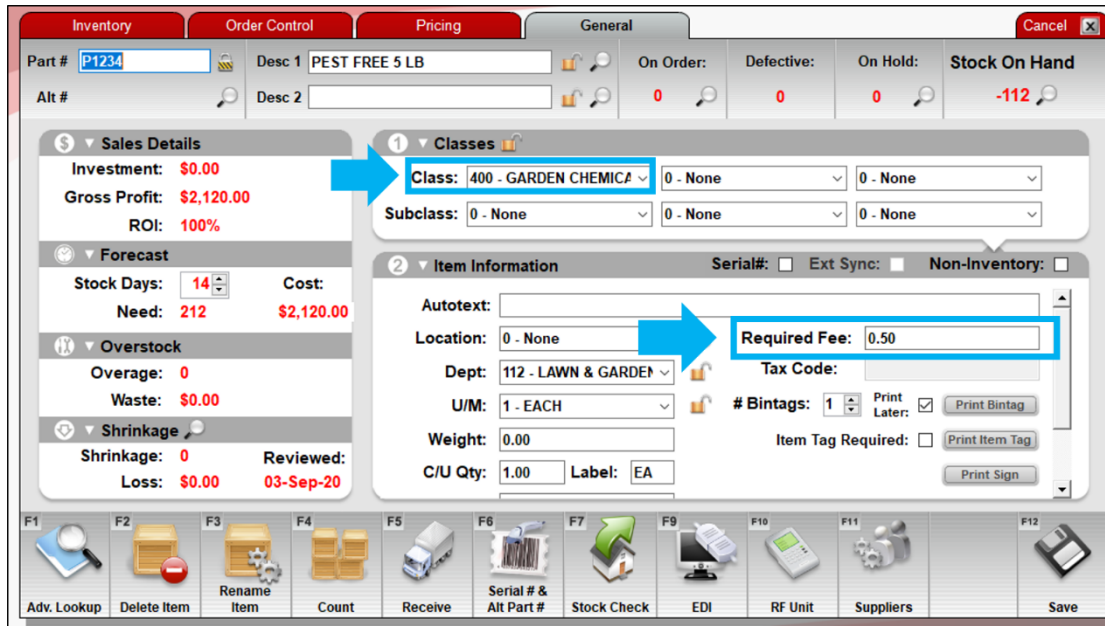
- For EMV-enabled stores, a new checkbox lets you optionally swipe a credit card to put it on-file in Paladin.
  - This feature is already available for stores that are not setup for EMV.
- To swipe the card, in the **Device Manager** window, clear (deselect) the **Manual Entry** checkbox that is selected by default.



## New item fee details report



Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N1234	LAYTEX PAINT 5 GAL	1	\$ 45.00	\$ 45.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N1234	45.00			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	REQUIRED FEE	Required Fee for item N1234	1	1.60	1.60



Part # **P1234** Desc 1 **PEST FREE 5 LB** On Order: 0 Defective: 0 On Hold: 0 Stock On Hand: -112

Alt # Desc 2

**Sales Details**  
Investment: \$0.00  
Gross Profit: \$2,120.00  
ROI: 100%

**Forecast**  
Stock Days: 14 Cost: \$2,120.00  
Need: 212

**Overstock**  
Overage: 0  
Waste: \$0.00

**Shrinkage**  
Shrinkage: 0 Reviewed: 03-Sep-20  
Loss: \$0.00

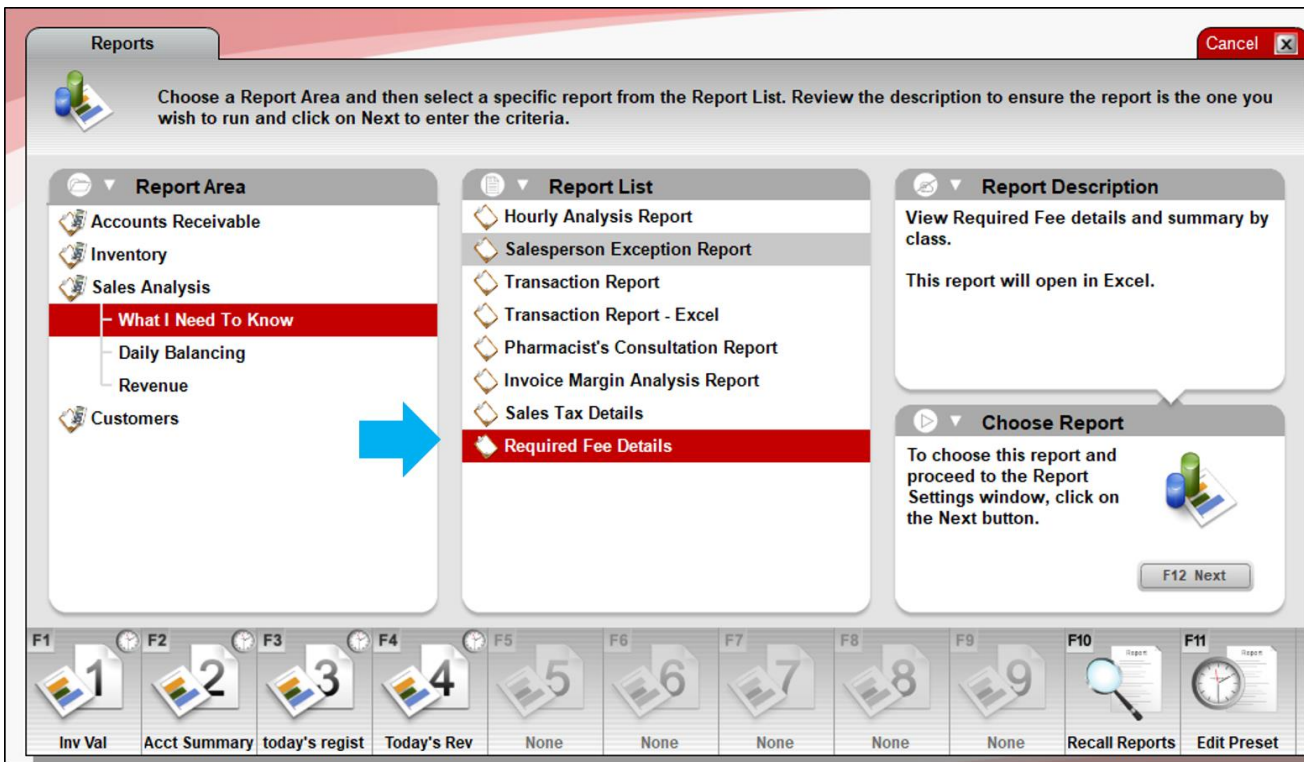
**Classes**  
Class: 400 - GARDEN CHEMICA  
Subclass: 0 - None

**Item Information**  
Autotext:   
Location: 0 - None  
Dept: 112 - LAWN & GARDEN  
U/M: 1 - EACH  
Weight: 0.00  
C/U Qty: 1.00 Label: EA  
Tax Code: **Required Fee: 0.50**  
# Bintags: 1  
Item Tag Required:   
Print Later:   
Print Bntag:   
Print Item Tag:   
Print Sign:

F1 Adv. Lookup F2 Delete Item F3 Rename Item F4 Count F5 Receive F6 Serial # & Alt Part # F7 Stock Check F8 EDI F9 RF Unit F10 Suppliers F11 Save

- Existing feature lets you set a fee on an inventory item that will be included at checkout.
- Set the fee on the **General** tab, in the **Item Information** pane.
- The fee name can be customized. In our example, the fee name is **Required Fee**.
- To turn on: Go to **File > Setup> Invoice(Store)** tab and select **Use Alternate Core Charge Identifier**.

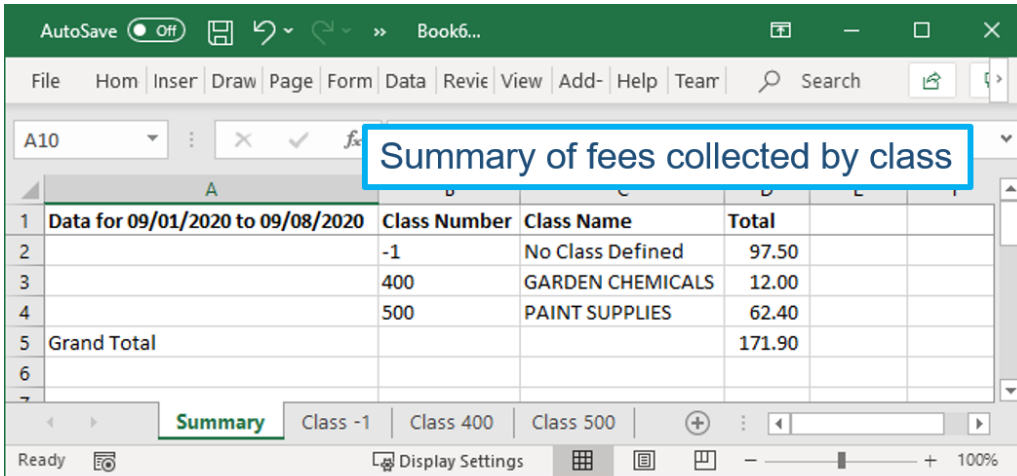
## New item fee details report



- The report is available in the **Reports** module under **Sales Analysis > What I Need to Know**.
- Select this report:  
*< Your fee name >* **Details**.
  - Example: **Required Fee Details**
- Select **Next**, select a time period and then run the report.



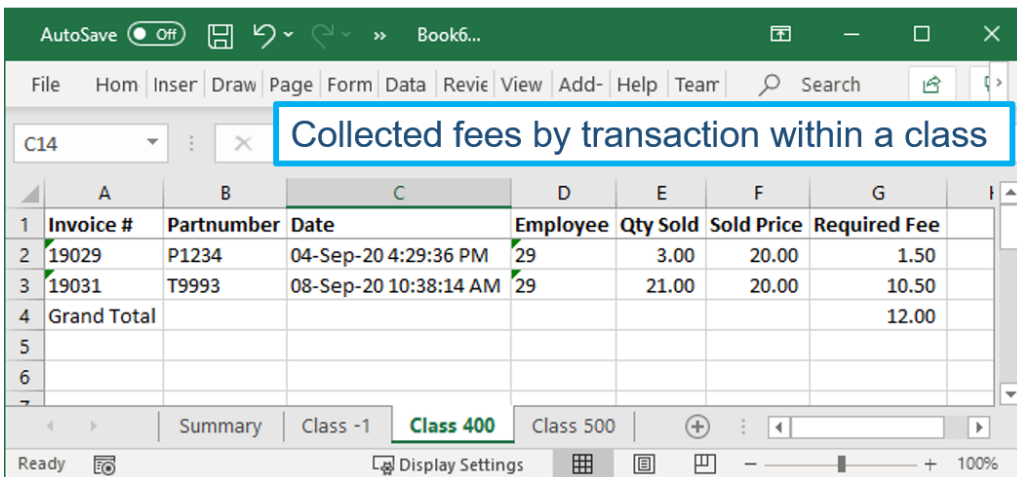
## New item fee details report



Summary of fees collected by class

	Class Number	Class Name	Total
1 Data for 09/01/2020 to 09/08/2020	-1	No Class Defined	97.50
2	400	GARDEN CHEMICALS	12.00
3	500	PAINT SUPPLIES	62.40
4 Grand Total			171.90
5			
6			
7			

Summary Class -1 Class 400 Class 500



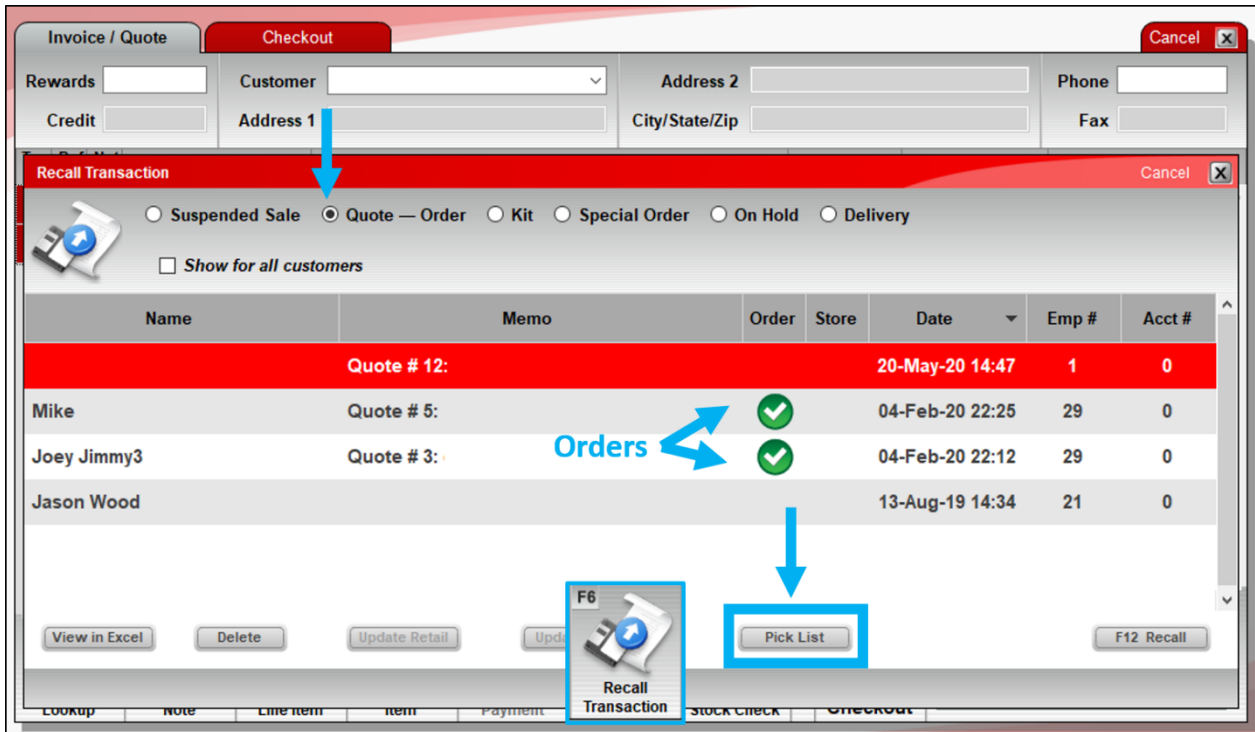
Collected fees by transaction within a class

Invoice #	Partnumber	Date	Employee	Qty Sold	Sold Price	Required Fee
1 19029	P1234	04-Sep-20 4:29:36 PM	29	3.00	20.00	1.50
2 19031	T9993	08-Sep-20 10:38:14 AM	29	21.00	20.00	10.50
3 Grand Total						12.00
4						
5						
6						
7						

Summary Class -1 Class 400 Class 500

- New Excel report associates the item fees with the item's class and provides:
  - A summary of fee totals by item class.
  - A list of collected fees in each class with transaction details.
- Best Practice: Make sure all items with fees are assigned to a class.
- Fees for items with no class assigned are grouped together in 'no class' category.

## Pick List: Outstanding order item details in Excel



Invoice / Quote    Checkout

Rewards    Customer    Address 2    Phone

Credit    Address 1    City/State/Zip    Fax

**Recall Transaction**    Cancel

☐ Suspended Sale    ☒ Quote — Order    ☐ Kit    ☐ Special Order    ☐ On Hold    ☐ Delivery

☐ Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
Quote # 12:				20-May-20 14:47	1	0
Mike	Quote # 5:	✓		04-Feb-20 22:25	29	0
Joey Jimmy3	Quote # 3:	✓		04-Feb-20 22:12	29	0
Jason Wood				13-Aug-19 14:34	21	0

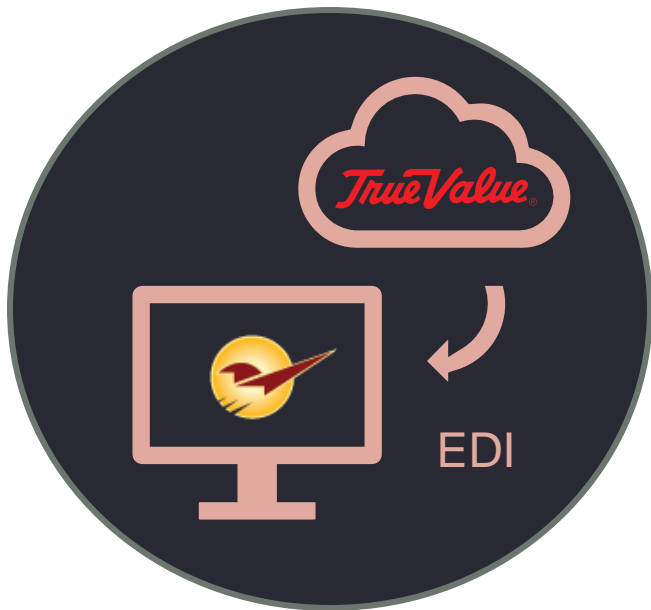
View in Excel    Delete    Update Retail    Update    **Pick List**    F12 Recall

F6 Recall Transaction

- A new **Pick List** report provides a detailed list of outstanding customer order items in Excel.
- In the **Invoice/Quote** module, click **Recall Transaction** (F6) > select **Quote — Order** > click **Pick List**.
- If there are multiple orders in the recalled transactions list, the Excel report will show the items on all orders.

## New True Value features

## Enhanced True Value EDI file support



Paladin EDI can now process these True Value files:

- **Fineline Updates** – Updates True Value finelines (weekly).
- **Long Descriptions** – Adds True Value long product descriptions into the Description 3 field in Paladin (**General** tab > **Item Information** pane) for new and updated items (weekly).
- **Images** – Imports product images into Paladin for new and updated items. When available, product images can be viewed in the **Advanced Lookup** window (weekly).
- **Drop Ship** – Process drop ship invoices (daily).
- **RDC Balances** – Update remote stock check data (daily).
- **Vendor Locations** – Update vendor locations (weekly).
- **Vendor Direct Ship Terms** – Process vendor shipment data (daily M-F).

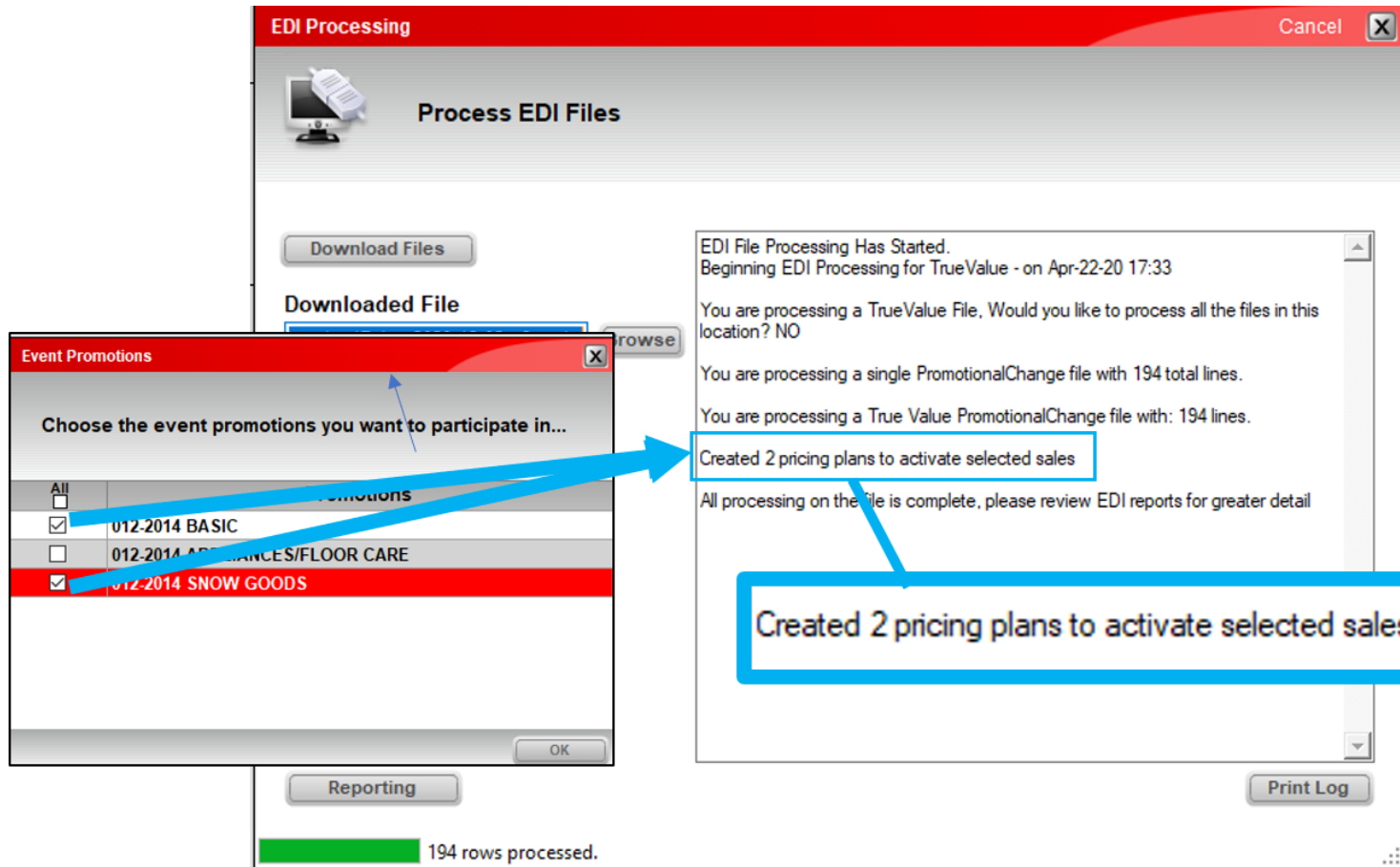
## Daily pricing and inventory uploads to True Value



- Paladin has added support for daily (end-of-day) pricing and inventory uploads to True Value for both non-True Value and True Value products.
- If you want to enable this feature, create a Help Request and Paladin Support will contact you.

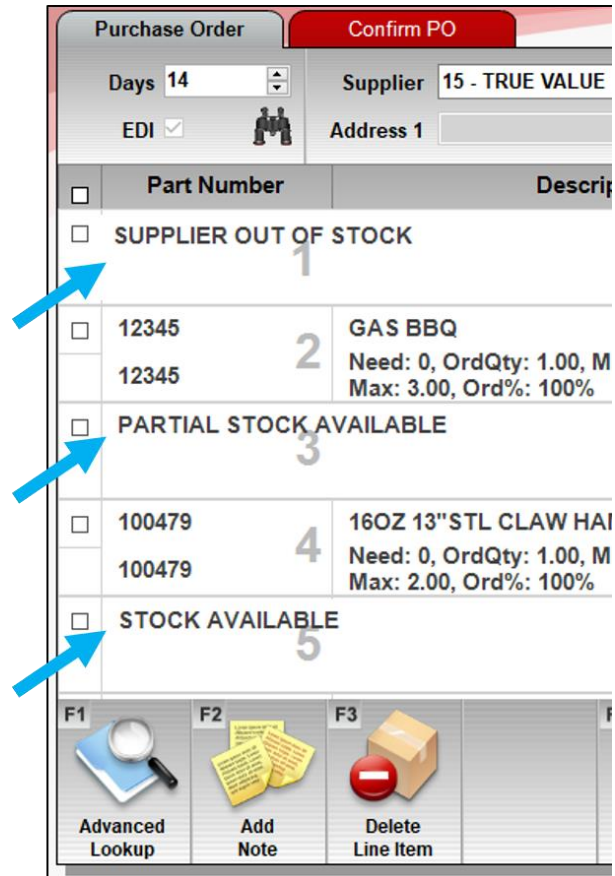
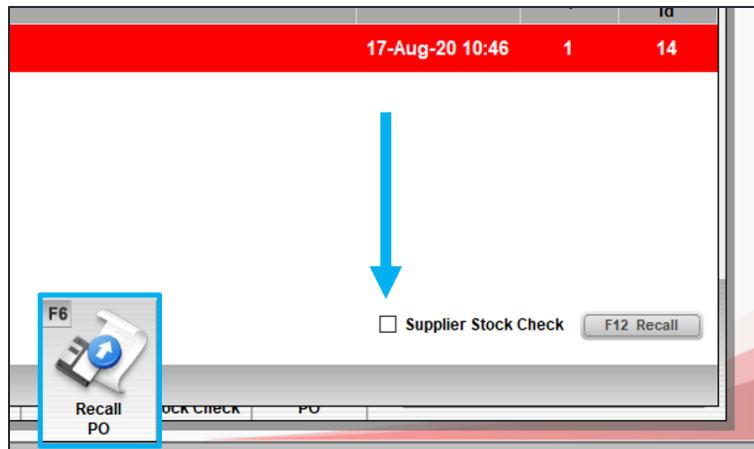
In Paladin, go to **Help > Support > Submit a Help Request**

# True Value automated pricing plans



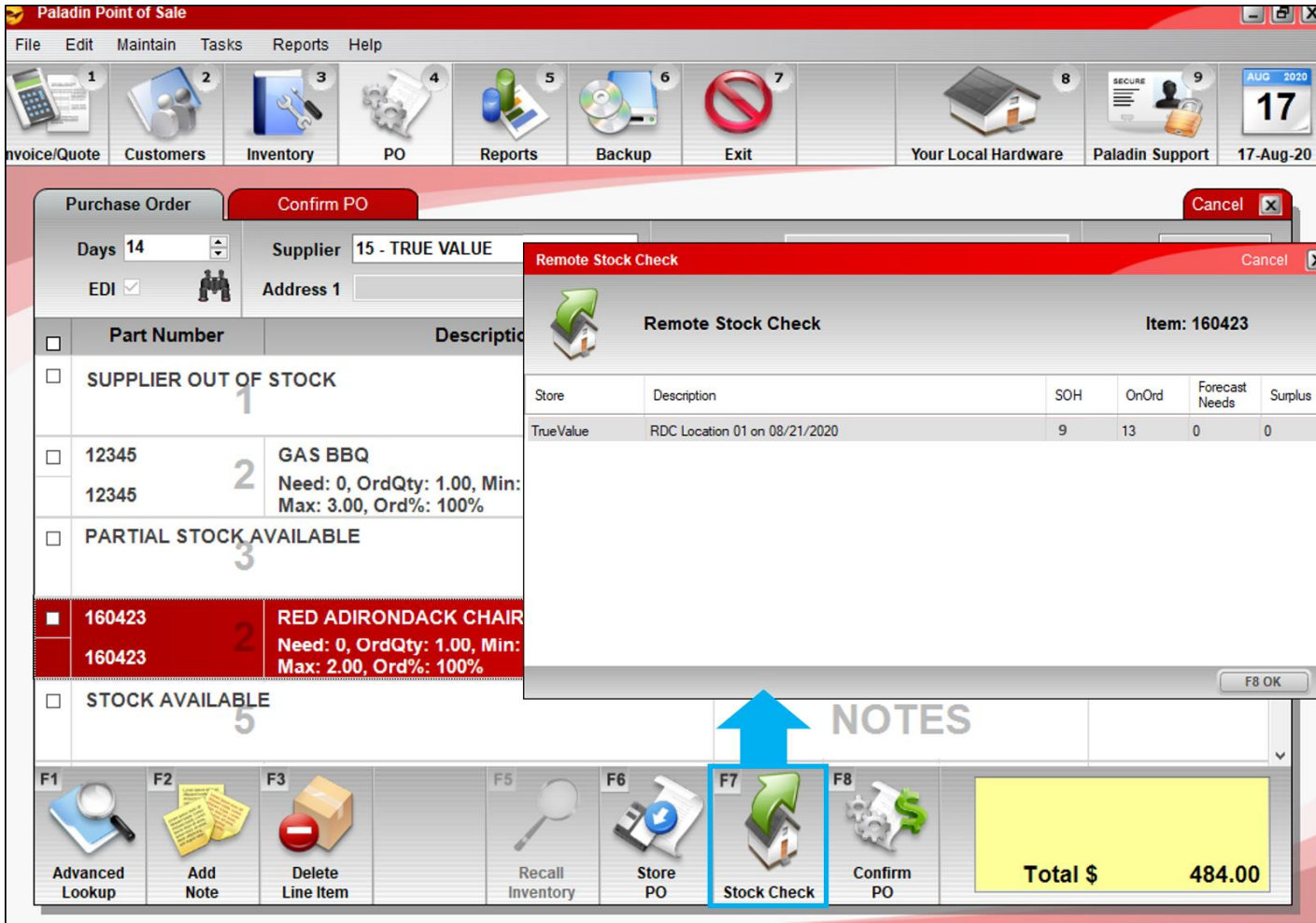
- When you run True Value EDI and select the sales you want to participate in, Paladin will automatically create the pricing plan.

## True Value RDC availability for POs



- Automatically sort purchase order items by Regional Distribution Center (RDC) availability.
- Items are divided into these categories:
  - SUPPLIER OUT OF STOCK
  - PARTIAL STOCK AVAILABLE
  - STOCK AVAILABLE
- To sort your PO, in the **Recall PO** window, select the PO, and then select the **Supplier Stock Check** checkbox before you click **Recall** (F12).

## True Value RDC Stock on Hand for PO items



The screenshot shows the 'Paladin Point of Sale' application. The main window displays a 'Purchase Order' for '15 - TRUE VALUE'. The 'Part Number' list includes '12345 GAS BBQ' and '160423 RED ADIRONDACK CHAIR'. A 'Remote Stock Check' dialog box is open for item 160423, showing a table with stock on hand (SOH) and other details. A blue arrow points to the 'F7 Stock Check' button in the bottom toolbar.

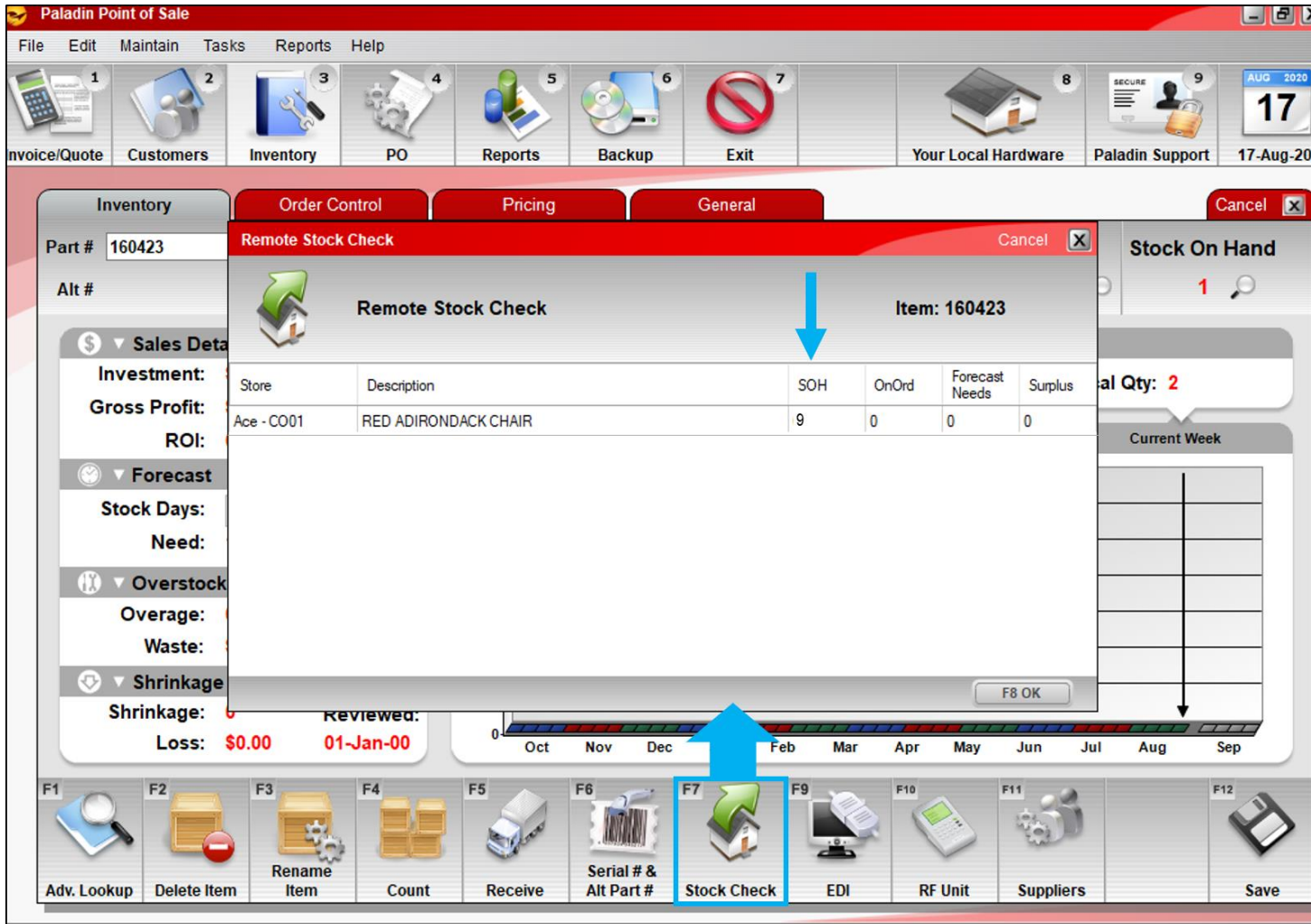
Store	Description	SOH	OnOrd	Forecast Needs	Surplus
TrueValue	RDC Location 01 on 08/21/2020	9	13	0	0

Bottom toolbar buttons: F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F5 Recall Inventory, F6 Store PO, **F7 Stock Check**, F8 Confirm PO. Total \$ 484.00.

- View RDC stock on hand for purchase order (PO) items.
- Select a PO item and click **Stock Check | Transfer** (multi-store) or press F7.
- **Note:** RDC availability and SOH is updated by processing the RDC Balances EDI file with a specified RDC ID.

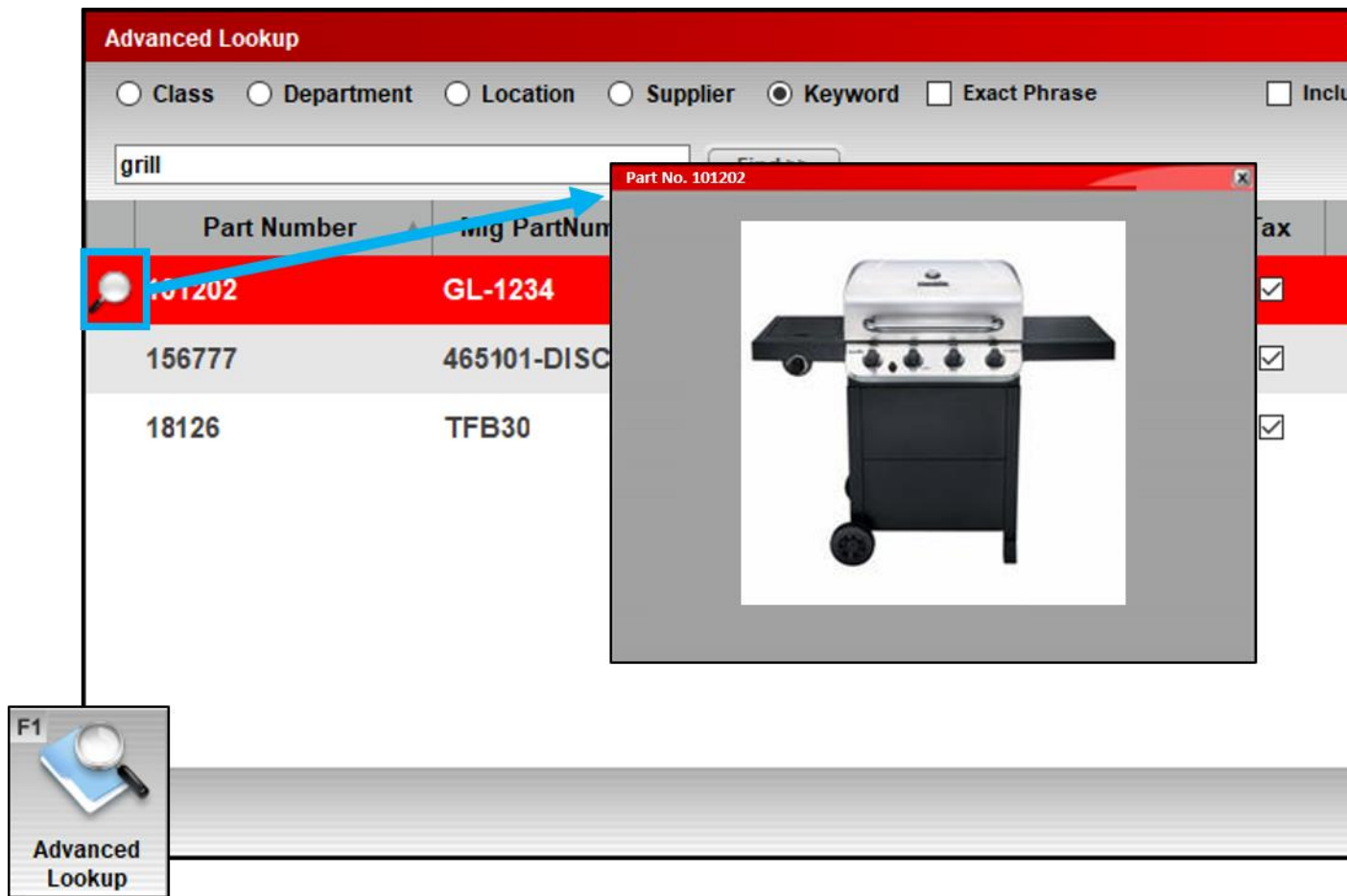


## True Value RDC Stock on Hand for inventory items



- RDC quantity on hand is also available in the **Inventory** module.
- Click **Stock Check | Transfer** (multi-store) or press F7.

# True Value product image viewer in Advanced Lookup



- In the **Advanced Lookup** window, a magnifying glass will open a product image (when available).
- Product images are added during EDI processing and will increase in number over time.

For additional details, view the  
[Summer 2020 Release Guide](#)

[portal.paladinpos.com/new-features/summer-2020](https://portal.paladinpos.com/new-features/summer-2020)



## Next Webinar:

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October 6 @ 9am PT

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