



# Virtual User Meeting – January 2021



Charles Owen

*Chief Experience Officer*

January 12, 2021

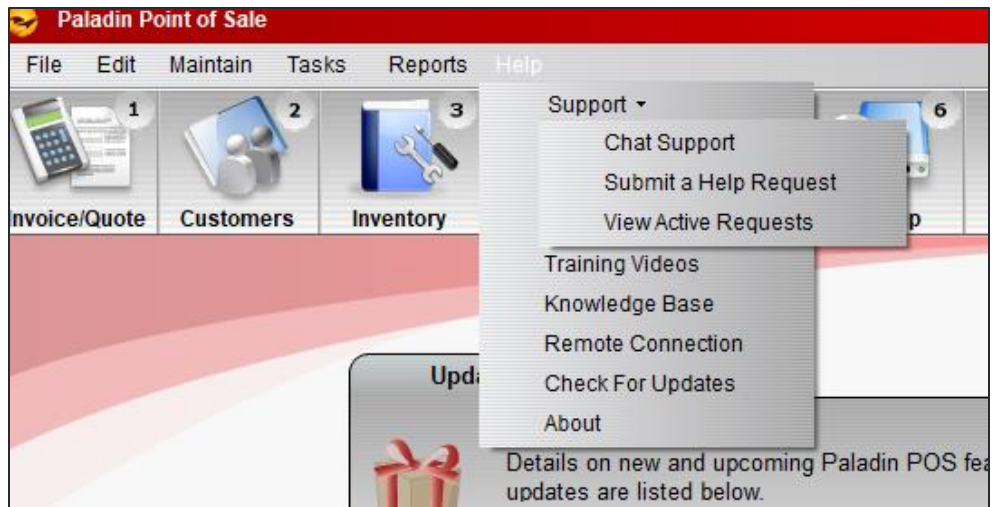
## ***WHAT YOU'LL LEARN***

Our recent 2020 release includes:

- A new Help Request Portal and Support menu
- Integrations for firearms and accounting
- Expanded mobile device support and apps
- New Point of Sale features

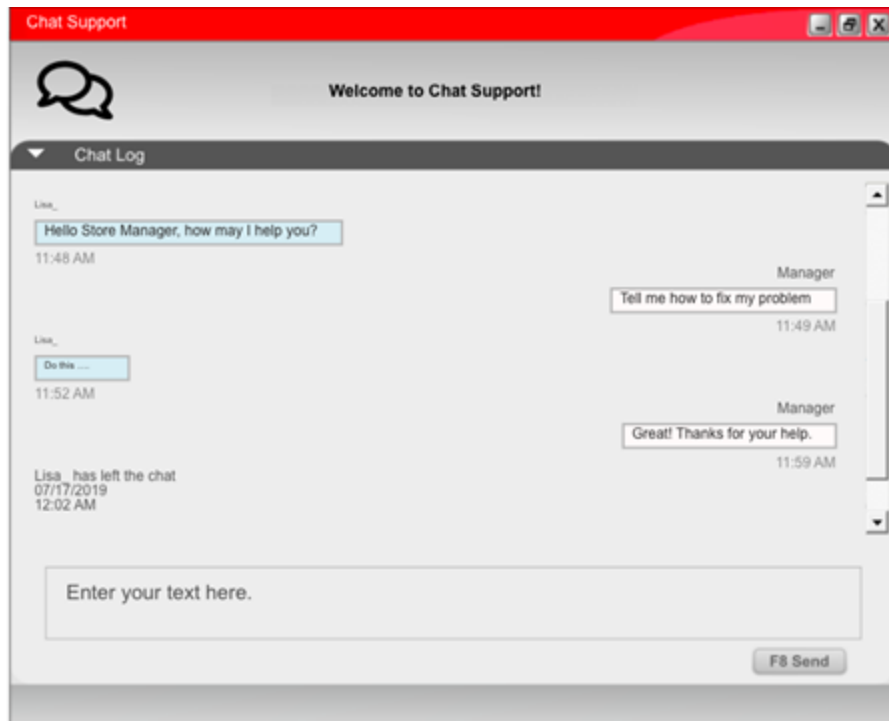
# A New Help Request Portal

## The new Help menu category: “Support”



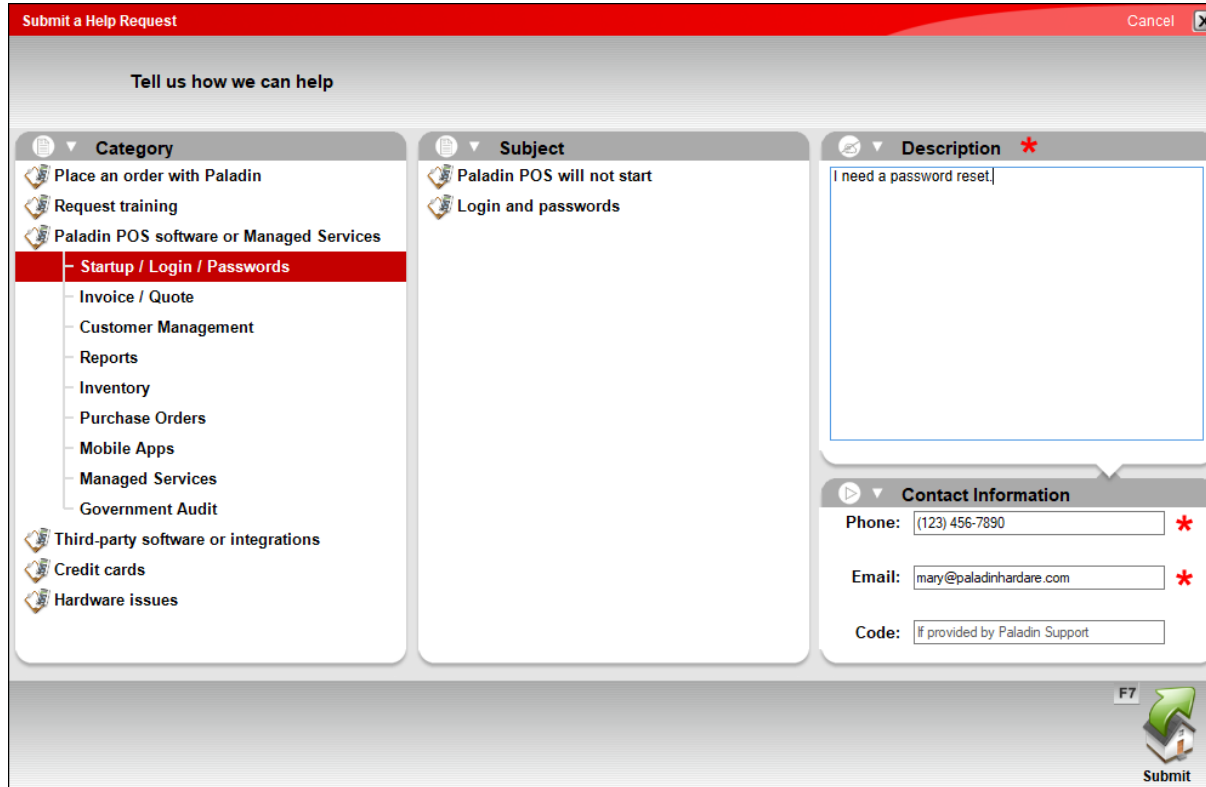
- A new **Support** category on the **Help** menu provides access to multiple support features:
  - **Chat Support** gets you immediate help and quick answers to simple questions.
  - **Submit a Help Request** lets you request help for more complex issues or when Chat Support is not available. This menu option replaces “Open a New Case”.
  - **View Active Requests** replaces the “My Cases” page on the Help Portal website.

## Chat Support



- Enter your question or inquiry and get real-time help from a Paladin Support representative.
- Chat Support is available 5 AM – 5 PM PST, Monday - Friday.

## Submit a Help Request



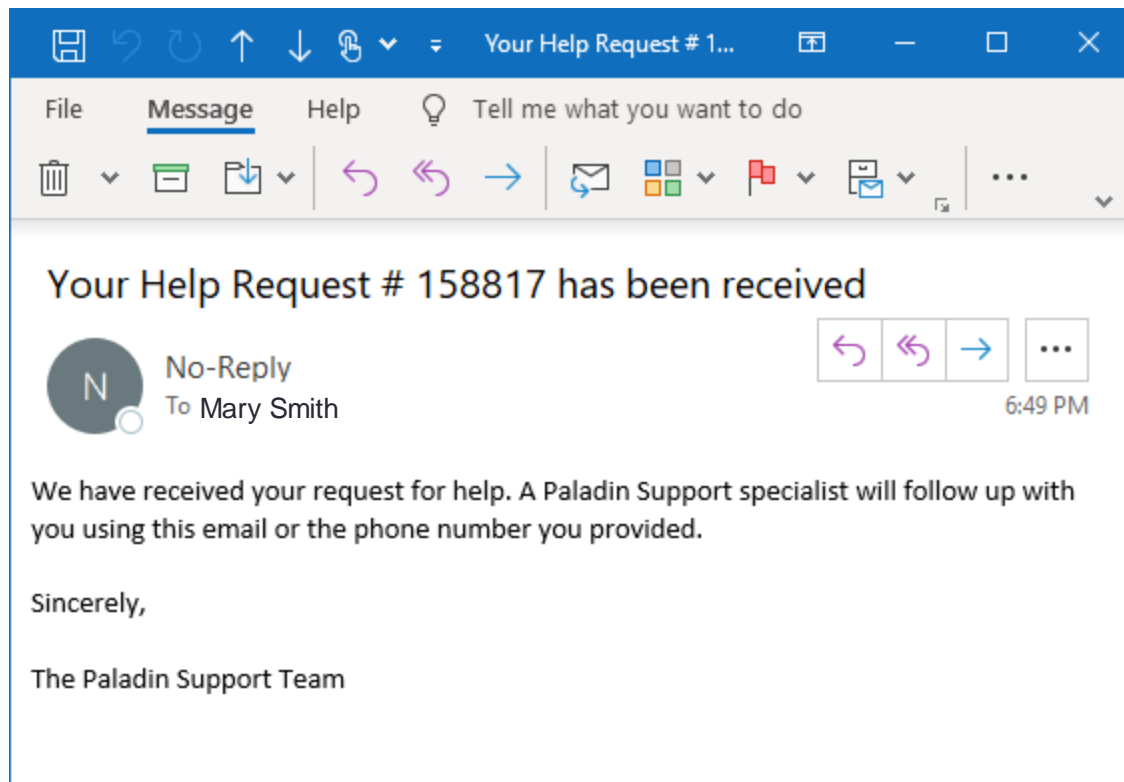
The screenshot shows a web form titled "Submit a Help Request" with a red header bar. Below the header, it says "Tell us how we can help". The form is divided into three main sections: "Category", "Subject", and "Description".

- Category:** A list of categories 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 with "Paladin POS will not start" and "Login and passwords" visible.
- Description:** A text area containing the text "I need a password reset".
- Contact Information:** A section with three fields: "Phone" (containing "(123) 456-7890"), "Email" (containing "mary@paladinhardare.com"), and "Code" (containing "If provided by Paladin Support"). Each field has a red asterisk indicating it is required.

At the bottom right, there is a "Submit" button with a green arrow icon and the text "F7 Submit".

- 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



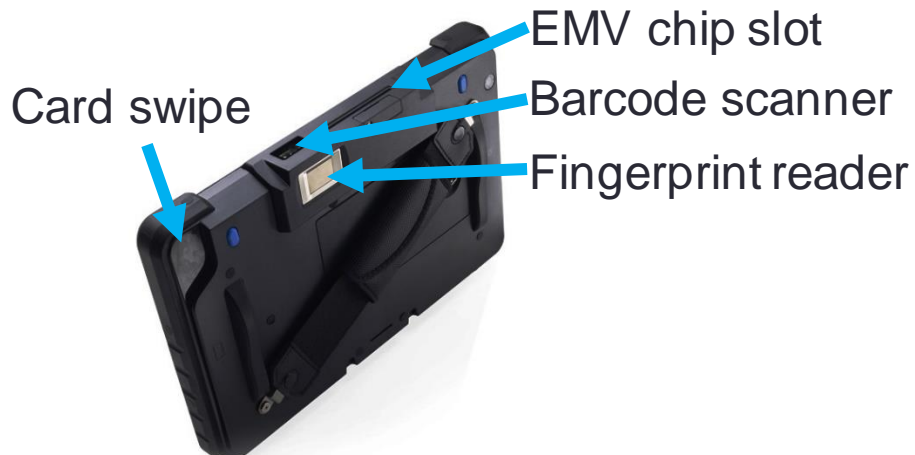
- Simplify the complicated process of selling firearms with the FastBound integration.
- Guaranteed compliance for firearm acquisition and disposition (A&D), an electronic 4473, and an electronic bound book with FastBound's FFL software.
- Receive and sell firearms in Paladin while simultaneously updating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

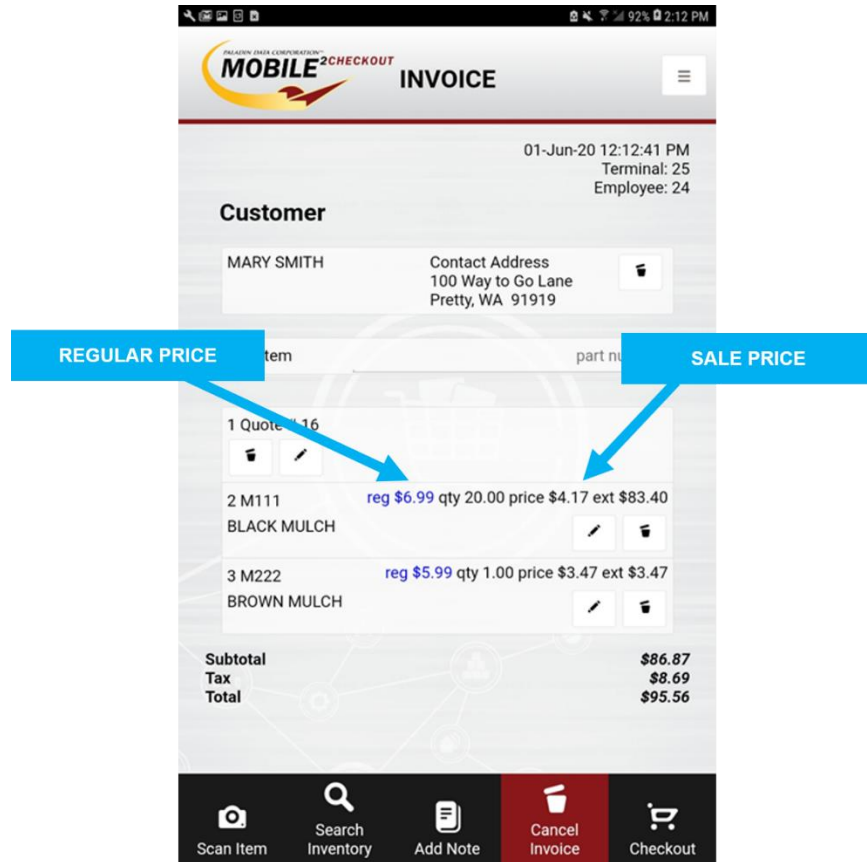


Card reader

## 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.

## 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.

## Ingenico Lane 7000/8000 payment terminals



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



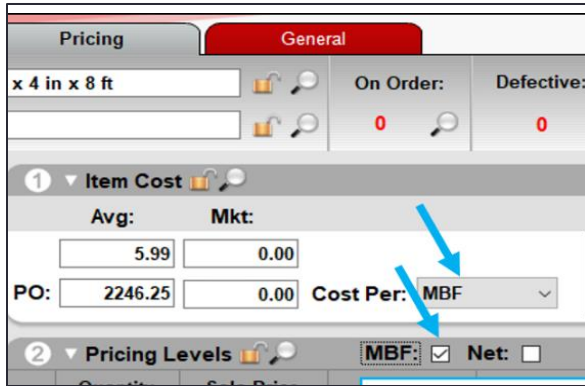
## Verifone P400 payment terminals



- 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.

## 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

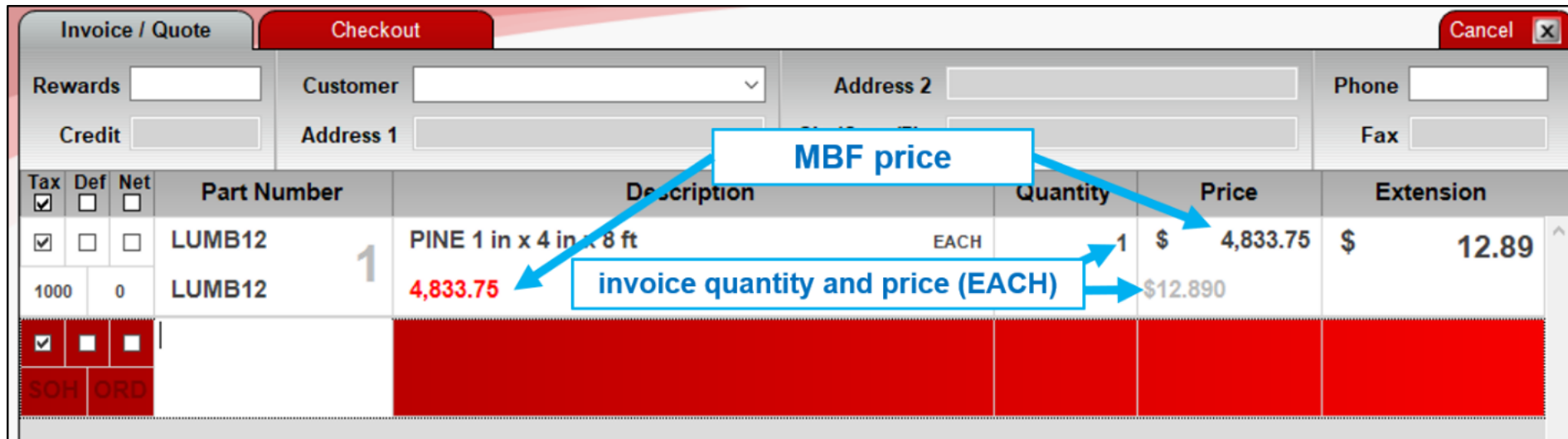
1 Item Cost

Avg: 5.99 Mkt: 0.00

PO: 2246.25 0.00 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 tons on invoices and quotes.
- To turn on, select the **MBF**, **MSF** or **TON** checkbox. (**Cost Per:** must be set to unit first.)



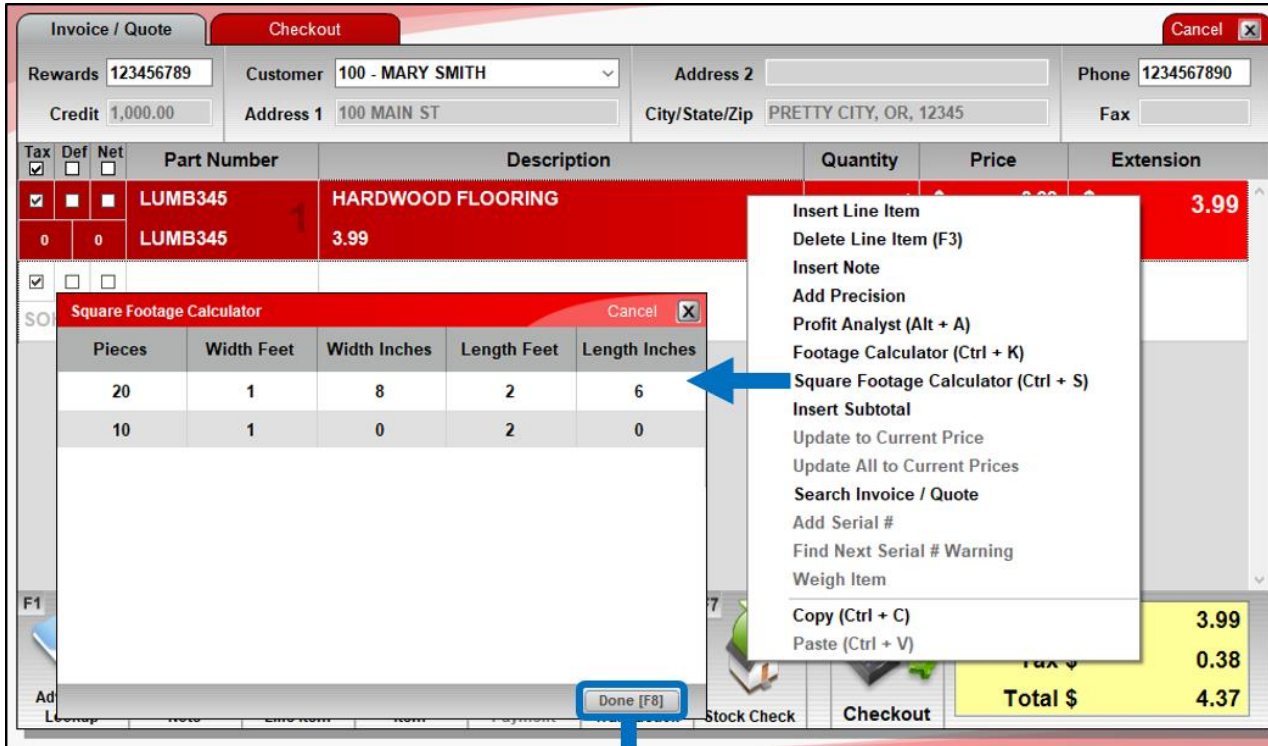
**Invoice / Quote Checkout**

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	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

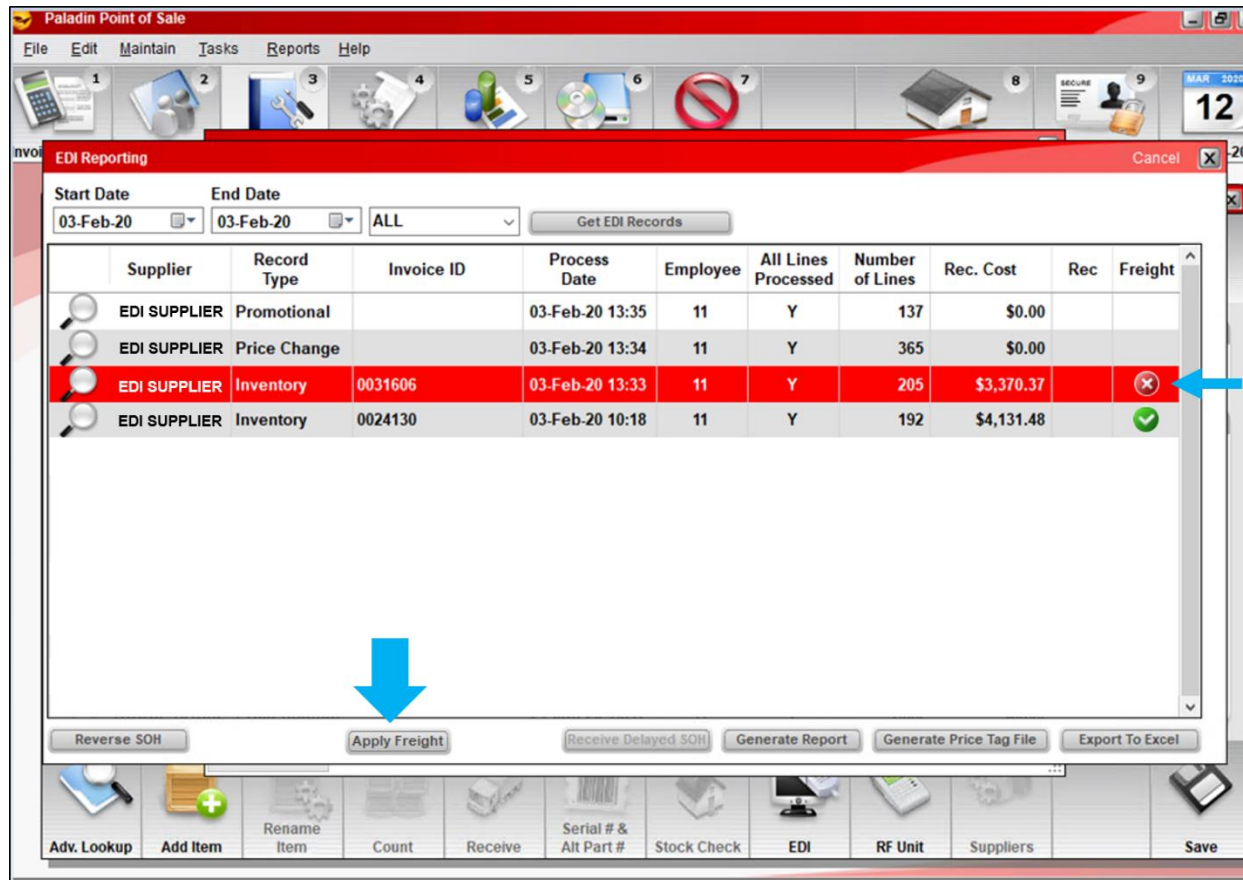
☐ Suspended Sale
 ☒ Quote — Order
 ☐

☐ 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**.

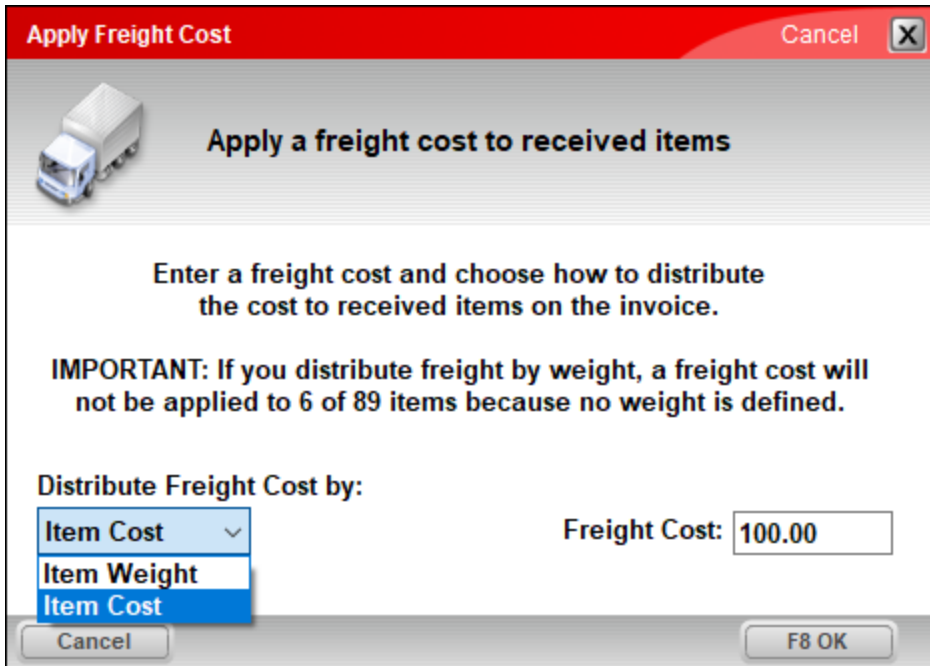
## Apply freight cost to EDI invoice items



- 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

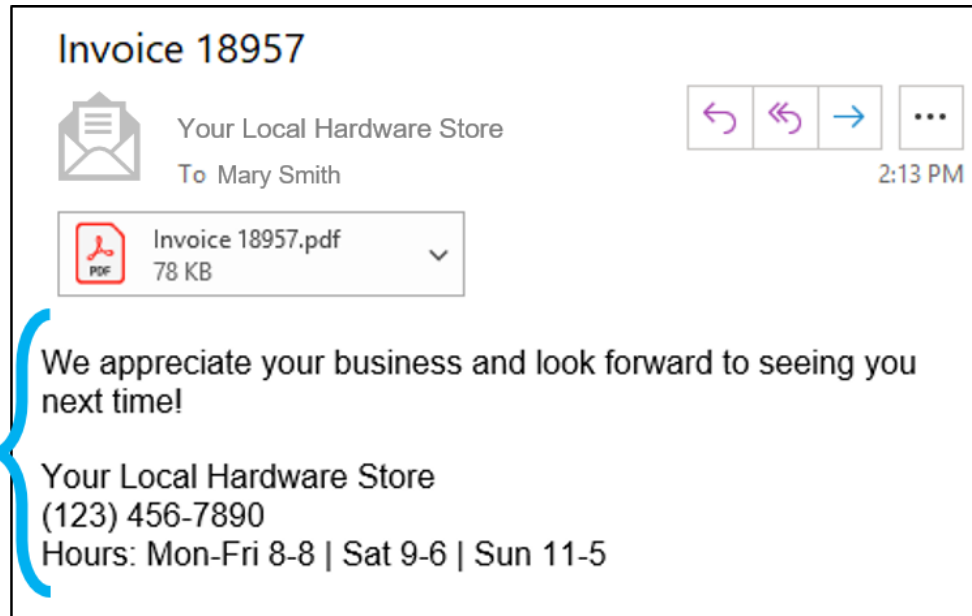
Cancel

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.



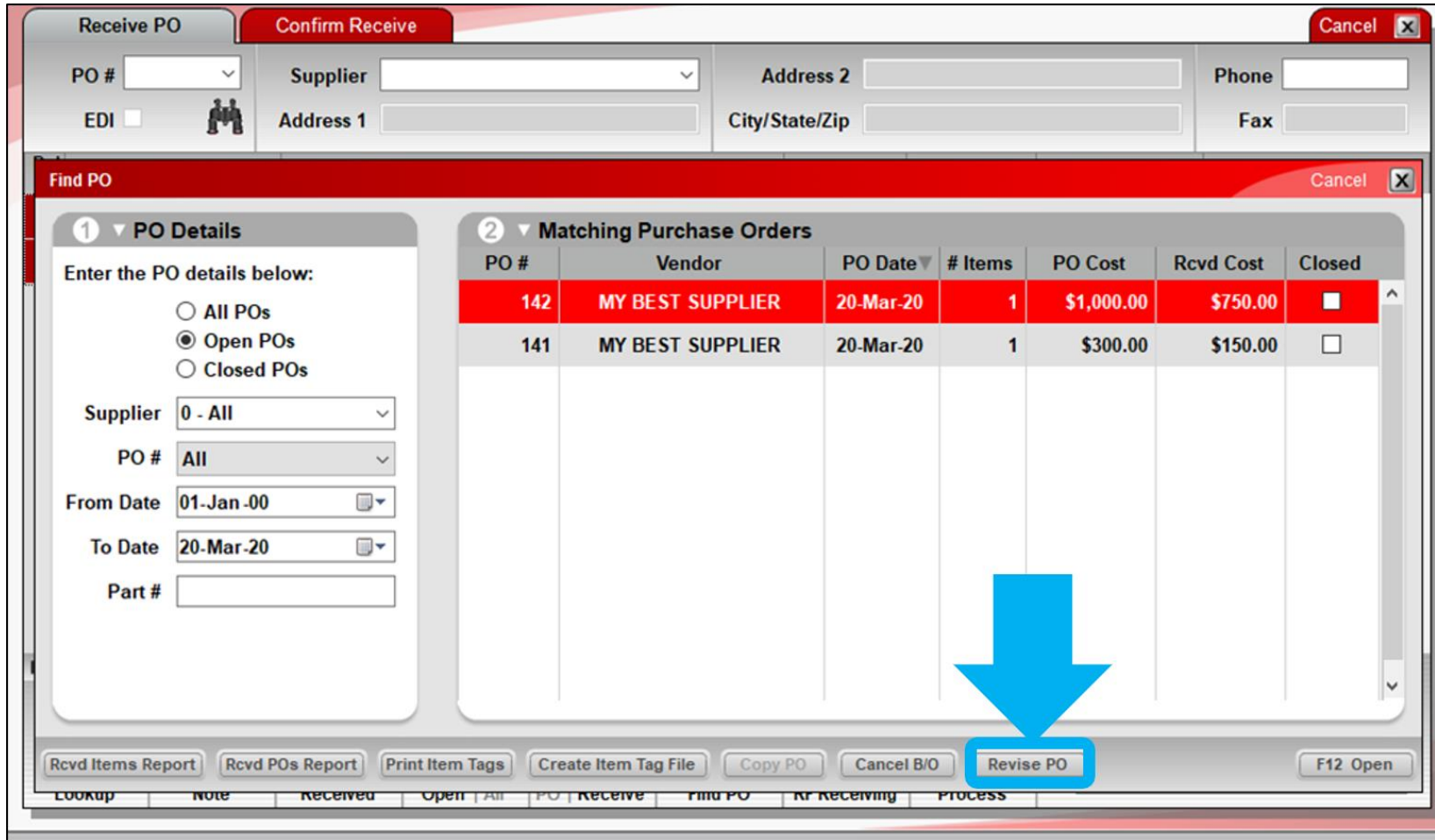
## Customized email invoice messages



- Add custom messages, 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

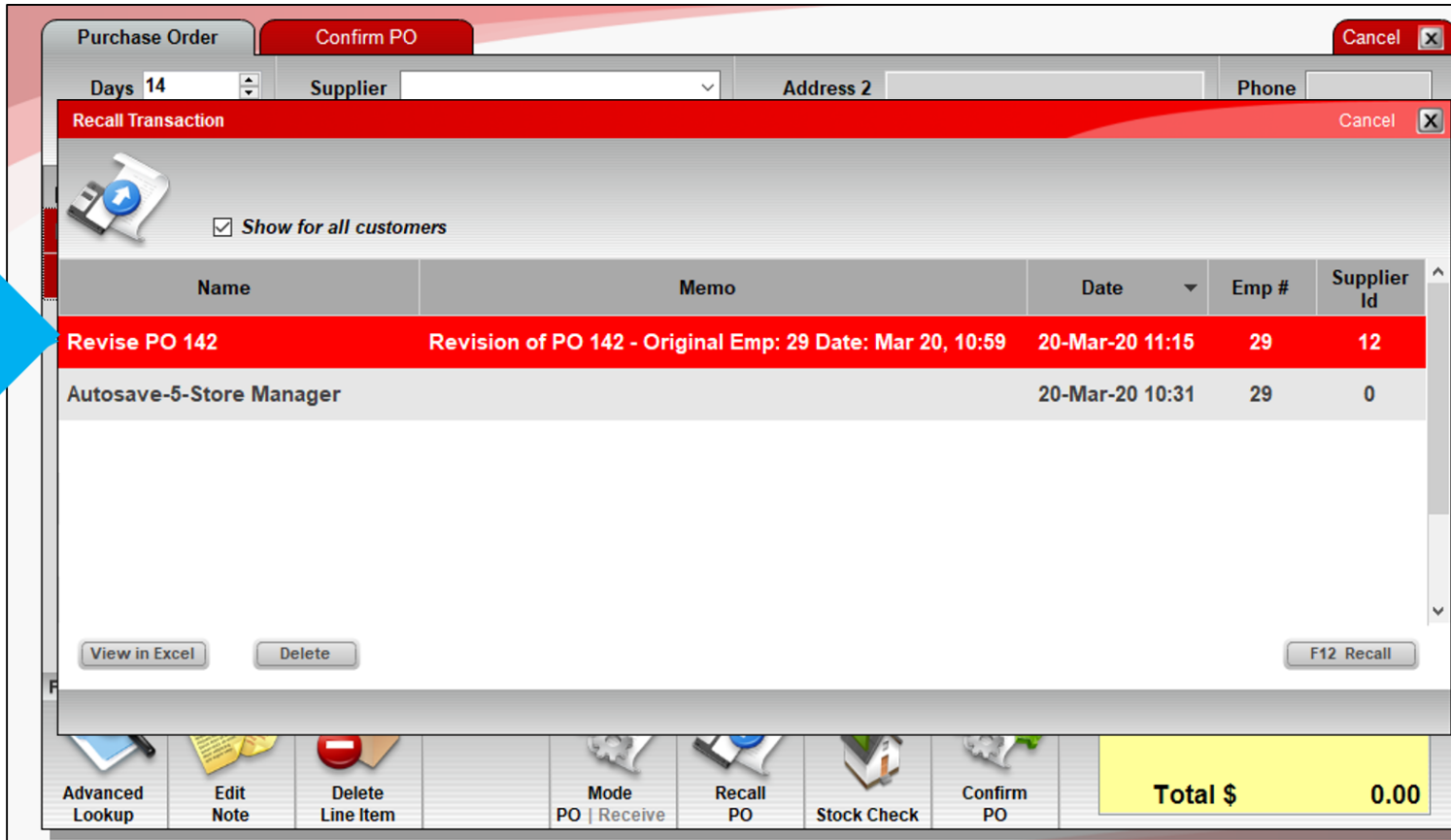


PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
142	MY BEST SUPPLIER	20-Mar-20	1	\$1,000.00	\$750.00	<input type="checkbox"/>
141	MY BEST SUPPLIER	20-Mar-20	1	\$300.00	\$150.00	<input type="checkbox"/>

- 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

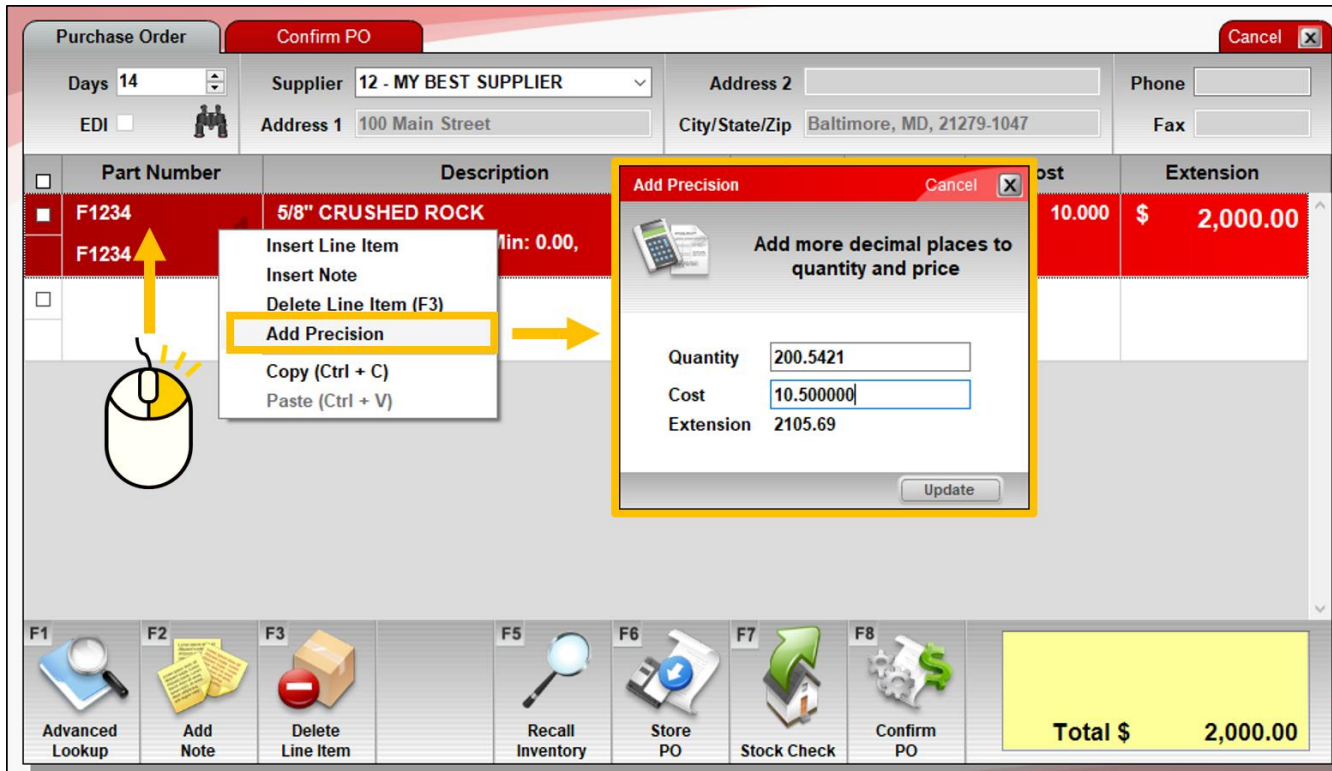
Recall PO

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. A right-click context menu is open over the first line item, with 'Add Precision' selected. The 'Add Precision' dialog box is displayed, showing the following values:

Field	Value
Quantity	200.5421
Cost	10.500000
Extension	2105.69

The main table in the background shows the following data:

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

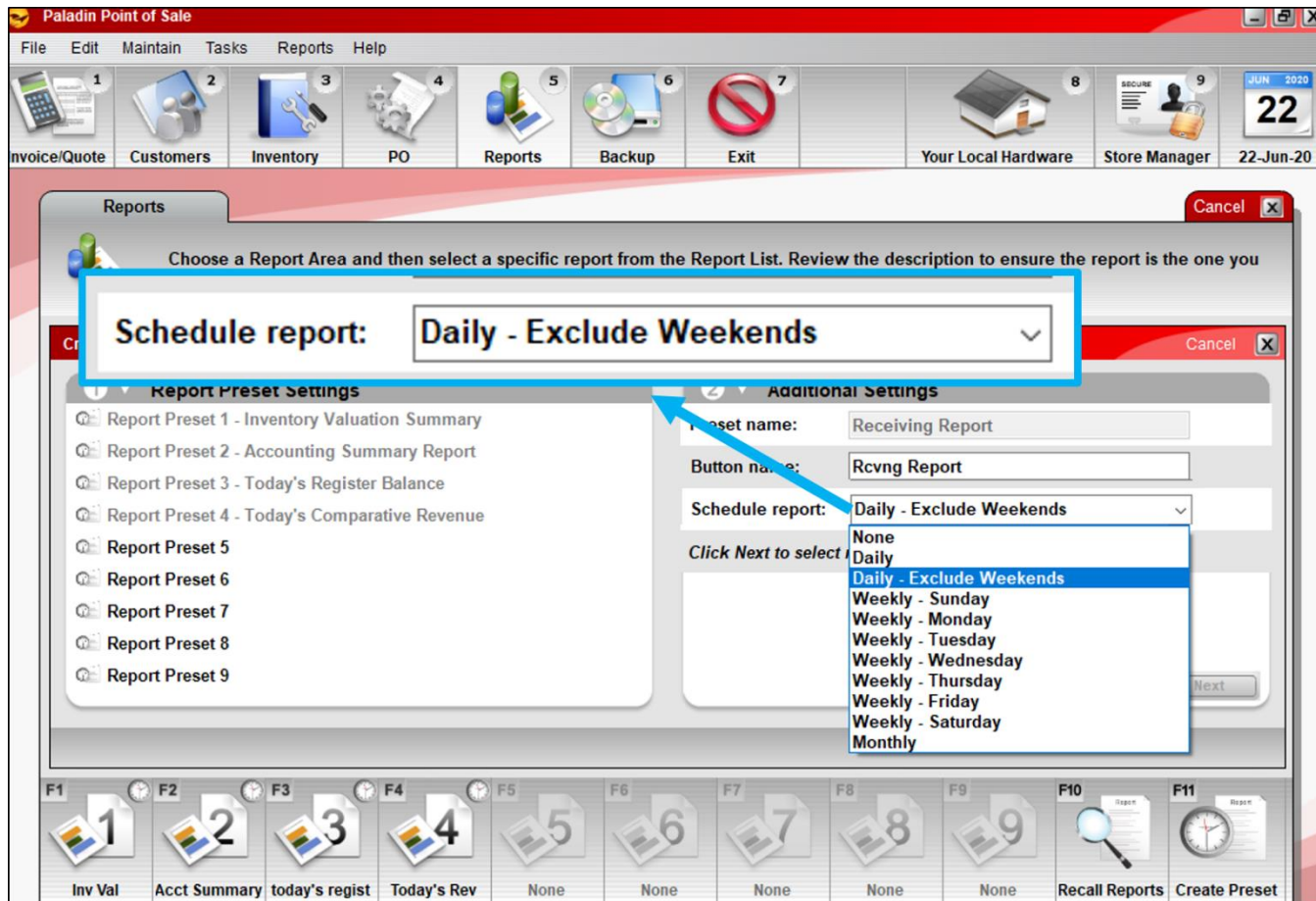
The bottom toolbar includes the following icons and labels:

- F1: Advanced Lookup
- F2: Add Note
- F3: Delete Line Item
- F5: Recall Inventory
- F6: Store PO
- F7: Stock Check
- F8: Confirm PO

The total at the bottom right is: 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

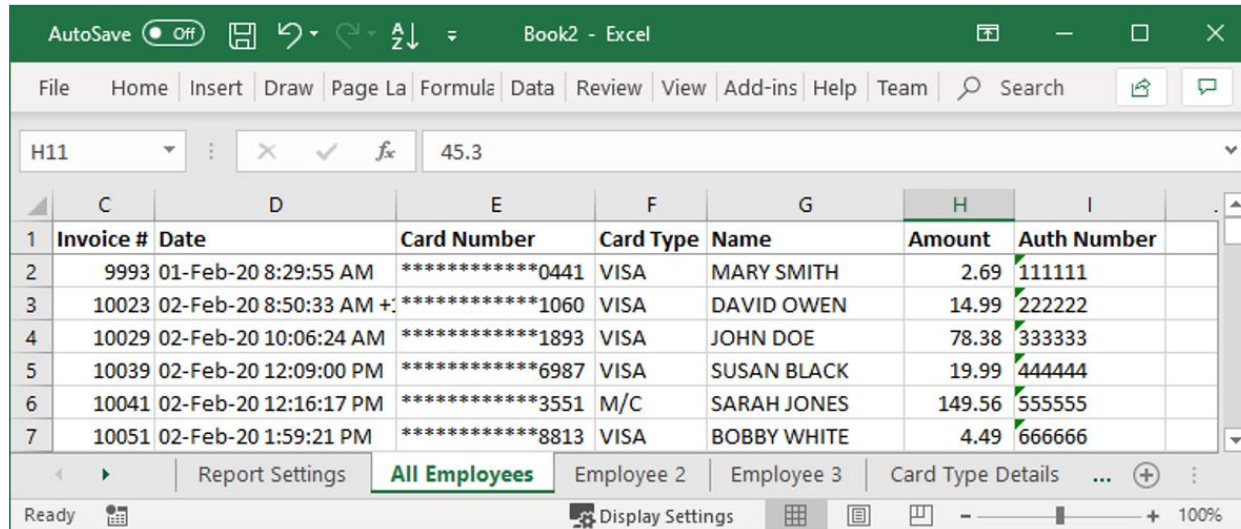
Credit Card Deposit

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

## Automatically exclude special orders from rewards



**SPECIAL ORDER**

Your Local Hardware Store  
123-456-7890

**SOLD TO:**  
(123) 456-7890  
MARY SMITH  
100 MAIN ST  
PRETTY CITY 12345

**SHIP TO:**  
MARY SMITH  
100 MAIN ST  
PRETTY CITY 12345

INVOICE #	0
ACCOUNT #	100
DATE	21-Jul-20
TIME	13:33
EMPLOYEE	29 - Store M.
TERMINAL	7
PAGE #	1

ITEM	DESCRIPTION	QTY	SALE	U/M	EXT
Quote # 17					
Special Order - Customer 100: MARY SMITH					
Special Order - Customer Phone: (123) 456-7890					
SO00002	Custom marble countertop	1.00	2,000.00	None	2000.00
Desired Date on Hand: 21 Jul 2020					

- Prevent special orders from earning rewards.
- Available for Rich Rewards or Repeat Rewards.
- Create a new no-rewards class and set **Default Class for Special Order Items (Company tab)** to the class ID.

## 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

Invoice / Quote

Checkout

Cancel

Rewards

Credit

Customer

Address 1

Address 2

City/State/Zip

Phone

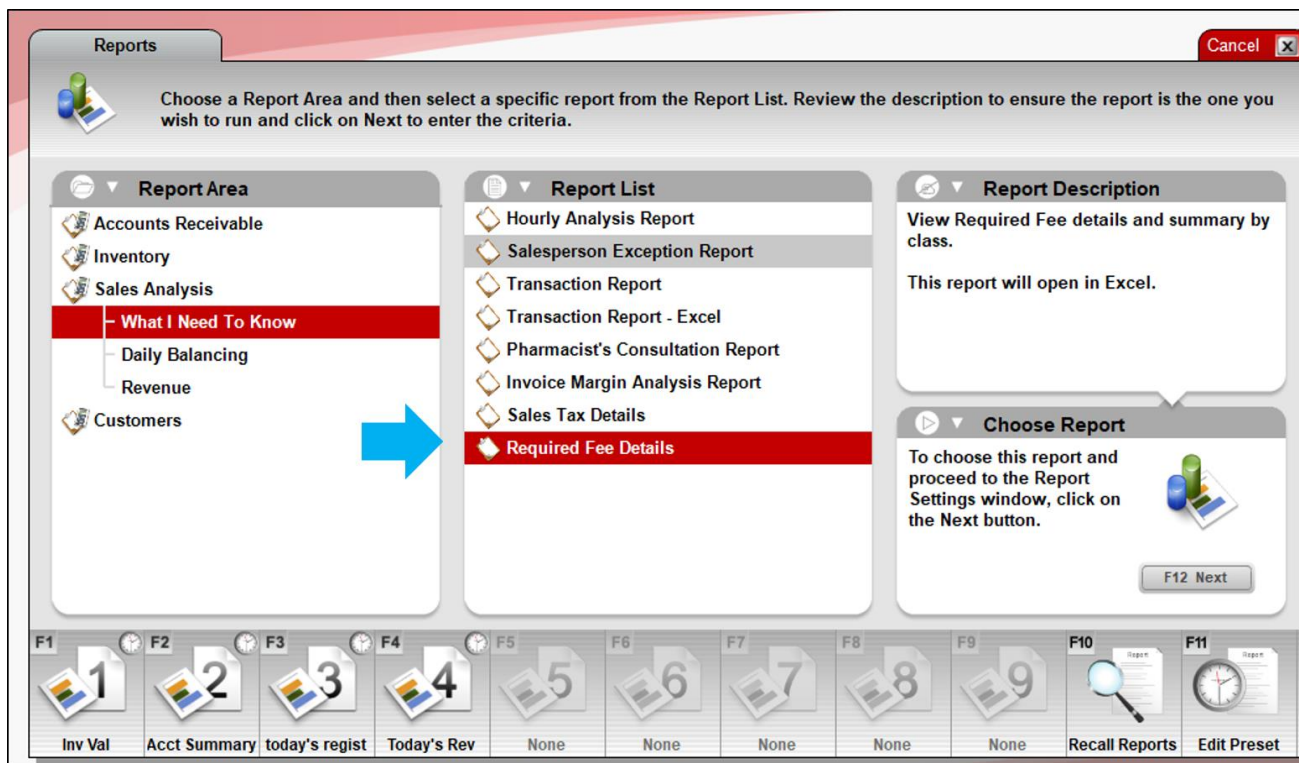
Fax

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
100	0		N1234	45.00			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	REQUIRED FEE	Required Fee for item N1234	1	1.60	1.60
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

- 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**.

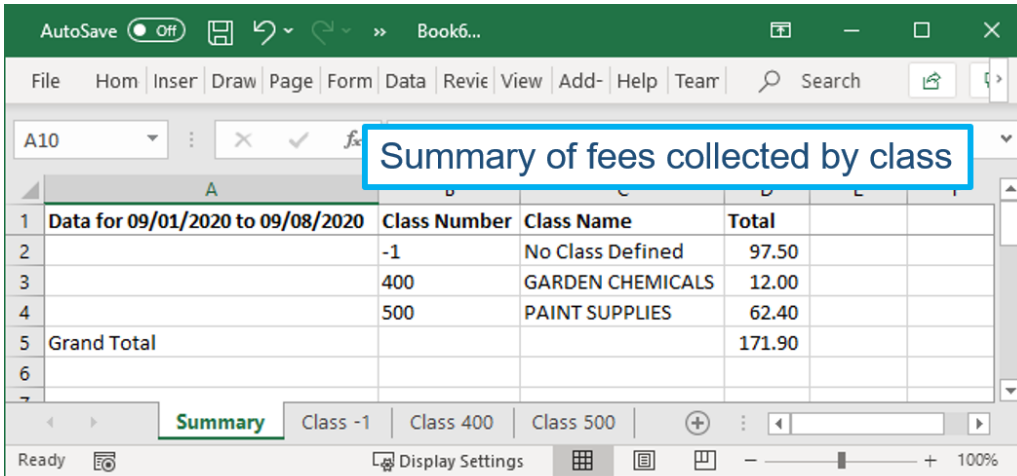
Inventory	Order Control	Pricing	General
Part # <b>P1234</b>	Desc 1 <b>PEST FREE 5 LB</b>	On Order: <b>0</b>	Defective: <b>0</b>
Alt #	Desc 2	On Hold: <b>0</b>	Stock On Hand: <b>-112</b>
<b>Sales Details</b> Investment: \$0.00 Gross Profit: \$2,120.00 ROI: 100%		<b>Classes</b> Class: 400 - GARDEN CHEMICA Subclass: 0 - None	
<b>Forecast</b> Stock Days: 14 Need: 212 Cost: \$2,120.00		<b>Item Information</b> Autotext: <input type="text"/> Location: 0 - None Dept: 112 - LAWN & GARDEN U/M: 1 - EACH Weight: 0.00 C/U Qty: 1.00 Label: EA	
<b>Overstock</b> Overage: 0 Waste: \$0.00		Tax Code: <input type="text"/> # Bintags: 1 Item Tag Required: <input type="checkbox"/>	
<b>Shrinkage</b> Shrinkage: 0 Loss: \$0.00 Reviewed: 03-Sep-20		Print Later: <input checked="" type="checkbox"/> <input type="button" value="Print Bntag"/> Print Item Tag: <input type="button" value="Print Item Tag"/> Print Sign: <input type="button" value="Print Sign"/>	

## 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.

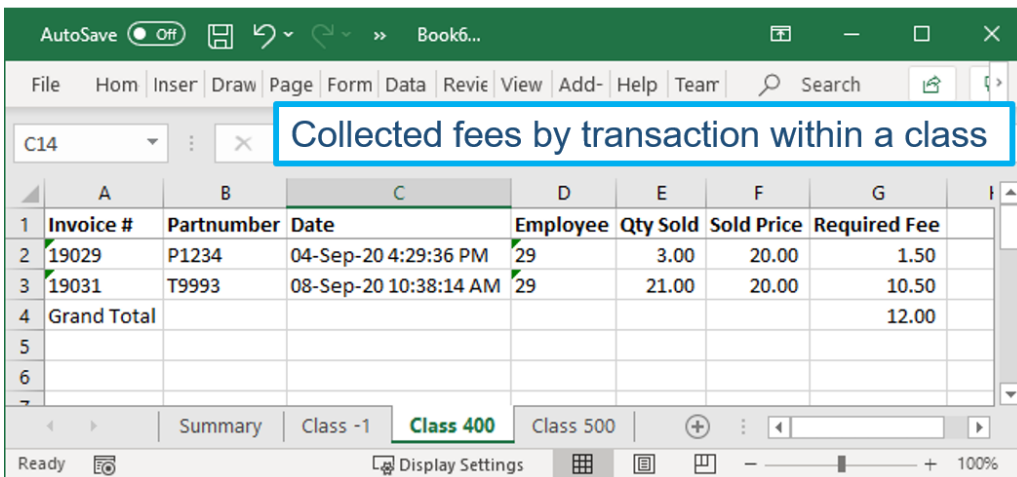
## New item fee details report



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



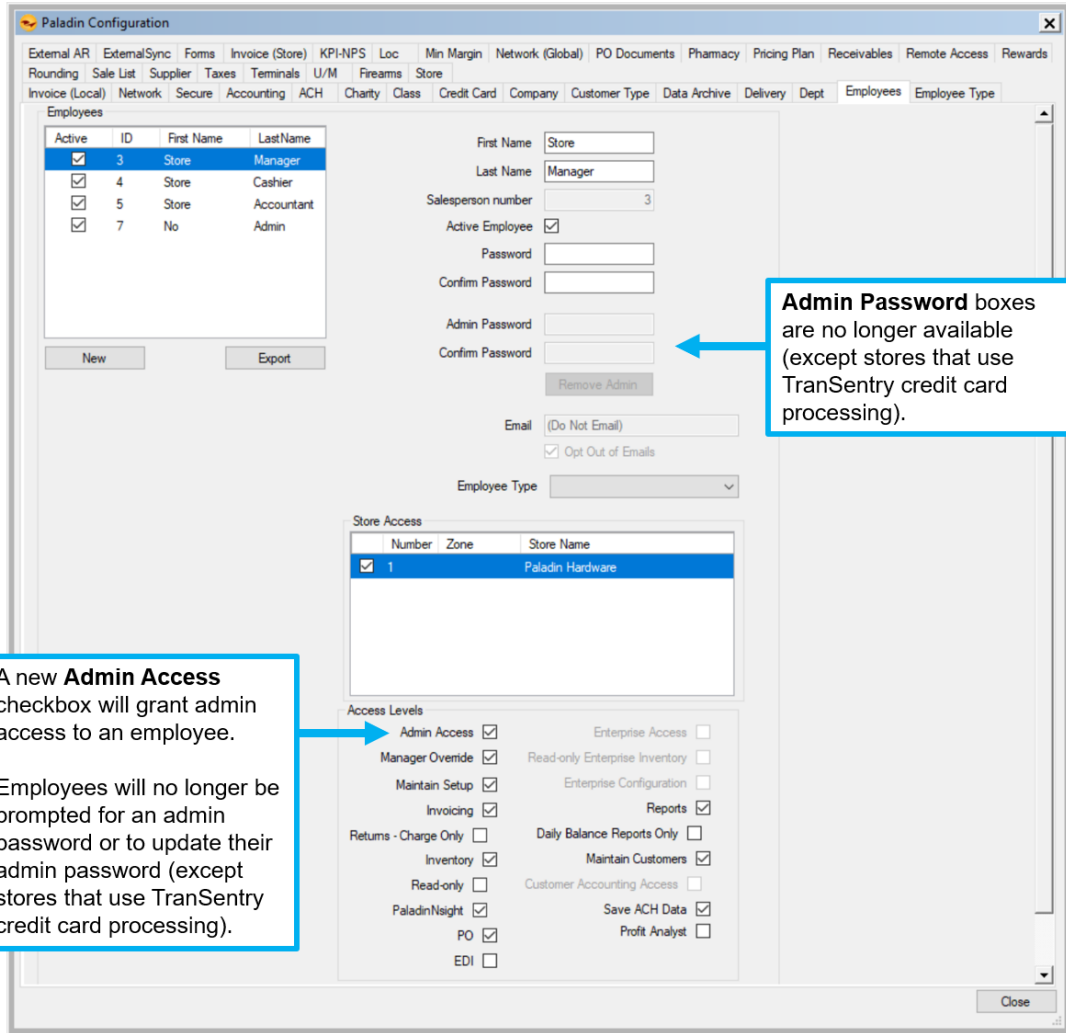
Collected fees by transaction within a class

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.

# New Admin Access level replaces Admin passwords



**Paladin Configuration**

External AR ExternalSync Forms Invoice (Store) KPI-NPS Loc Min Margin Network (Global) PO Documents Pharmacy Pricing Plan Receivables Remote Access Rewards

Rounding Sale List Supplier Taxes Terminals U/M Firearms Store

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees Employee Type

**Employees**

Active	ID	First Name	Last Name
<input checked="" type="checkbox"/>	3	Store	Manager
<input checked="" type="checkbox"/>	4	Store	Cashier
<input checked="" type="checkbox"/>	5	Store	Accountant
<input checked="" type="checkbox"/>	7	No	Admin

New Export

First Name:

Last Name:

Salesperson number:

Active Employee: ☒

Password:

Confirm Password:

Admin Password:

Confirm Password:

Remove Admin

Email: (Do Not Email)

☒ Opt Out of Emails

Employee Type:

**Store Access**

Number	Zone	Store Name
<input checked="" type="checkbox"/>	1	Paladin Hardware

**Access Levels**

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Inventory <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Configuration <input type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>
Returns - Charge Only <input type="checkbox"/>	Daily Balance Reports Only <input type="checkbox"/>
Inventory <input checked="" type="checkbox"/>	Maintain Customers <input checked="" type="checkbox"/>
Read-only <input type="checkbox"/>	Customer Accounting Access <input type="checkbox"/>
PaladinNaight <input checked="" type="checkbox"/>	Save ACH Data <input checked="" type="checkbox"/>
PO <input checked="" type="checkbox"/>	Profit Analyst <input type="checkbox"/>
EDI <input type="checkbox"/>	

Close

A new **Admin Access** checkbox will grant admin access to an employee.

Employees will no longer be prompted for an admin password or to update their admin password (except stores that use TranSentry credit card processing).

Admin Password boxes are no longer available (except stores that use TranSentry credit card processing).

- A new **Admin Access** permission setting in the **Access Levels** pane on the **Employees** tab will grant admin access.
- Admin passwords will no longer be required.
- An employee with **Admin Access** will have direct access Paladin features and settings that previously required an admin password.

## Itemized taxes on receipts

CASH SALE

ITEM	QTY	SALE/REG	EXT
PART1	1.00	25.49	25.49
EACH			
HAMMER			

SUBTOTAL \$	25.49
State \$	~0.739832
County \$	~0.280626
City \$	~1.099543
<b>TOTAL \$</b>	<b>27.61</b>

CASH	27.61
------	-------

EMPLOYEE	TERM	INV#	TIME	DATE
29	7	19039	10:19	25-Sep-20

Individual tax  
amounts

- If you show individual tax amounts on receipts instead of the tax total, the individual taxes will appear to six decimal places designated with a tilde (~).
- The tilde indicates that the displayed amounts are approximate. Paladin calculates each individual tax rate to many decimal places.
- The combined tax total will always sum to an exact penny (two decimal) amount.

COMING SOON!

## COMING SOON! Hardware Hank e-commerce integration



- Paladin is developing an e-commerce integration that will upload your store's inventory data to a new Hardware Hank online store.
- Inventory data will include:
  - Prices
  - Stock on hand (SOH)

For additional details, view the

## Paladin 2020 Release Guide

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







Check out our [2020 Release Guide](#) on the Help Portal.

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