



Virtual User Meeting – Fall 2020



Chad Klein
Account Manager
July 28, 2020

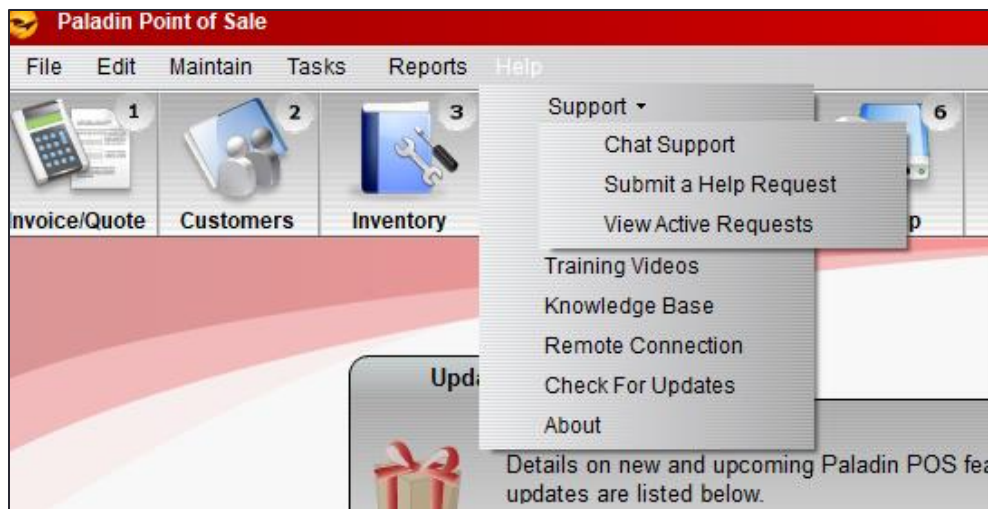
WHAT YOU'LL LEARN

Our Summer 2020 Release includes:

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

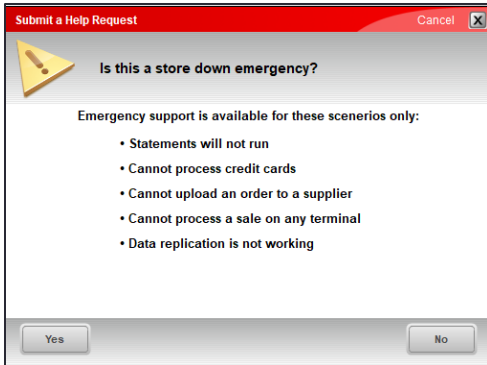
The New Help Request Portal

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



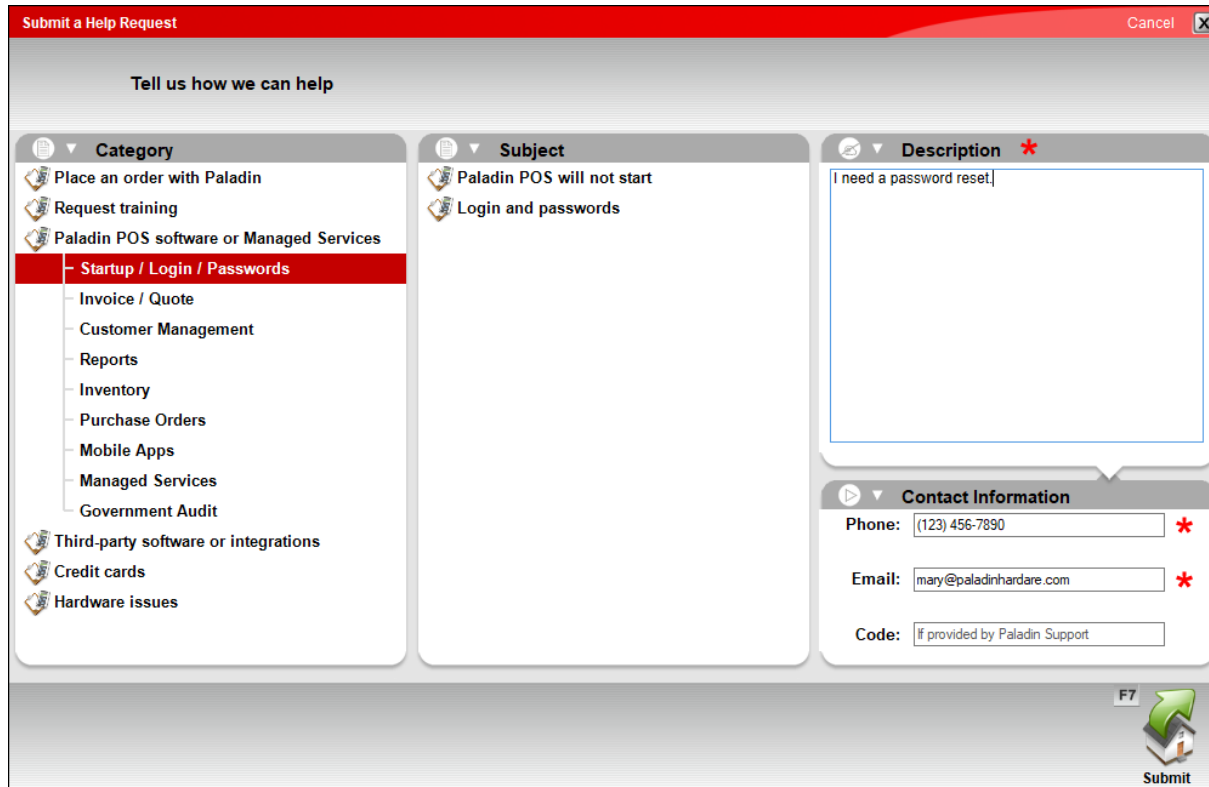
Submit a Help Request

Is this a store down emergency?

Emergency support is available for these scenarios only:

- Statements will not run
- Cannot process credit cards
- Cannot upload an order to a supplier
- Cannot process a sale on any terminal
- Data replication is not working

Yes No



Submit a Help Request

Tell us how we can help

Category

- Place an order with Paladin
- Request training
- Paladin POS software or Managed Services
 - Startup / Login / Passwords**
 - Invoice / Quote
 - Customer Management
 - Reports
 - Inventory
 - Purchase Orders
 - Mobile Apps
 - Managed Services
 - Government Audit
- Third-party software or integrations
- Credit cards
- Hardware issues

Subject

- Paladin POS will not start
- Login and passwords

Description *

I need a password reset.

Contact Information

Phone: (123) 456-7890 *

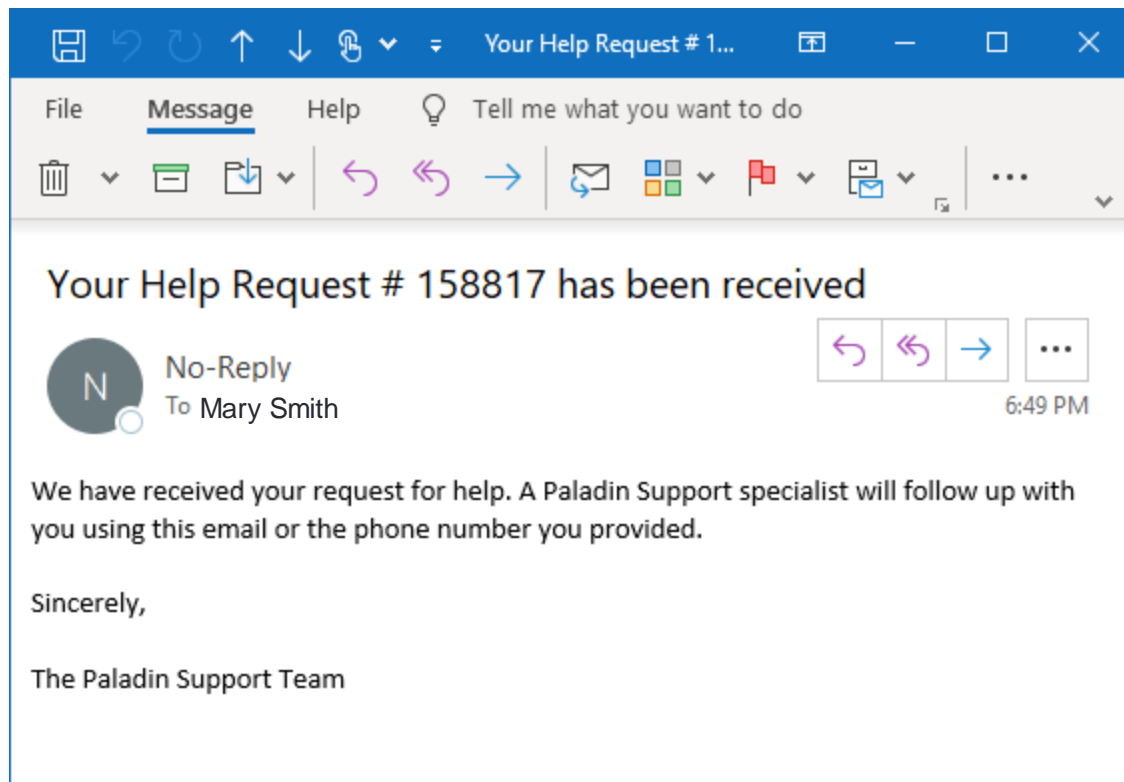
Email: mary@paladinhardware.com *

Code: If provided by Paladin Support

F7 Submit

- Answer the store-down emergency question and then fill out the Help Request form.
- 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



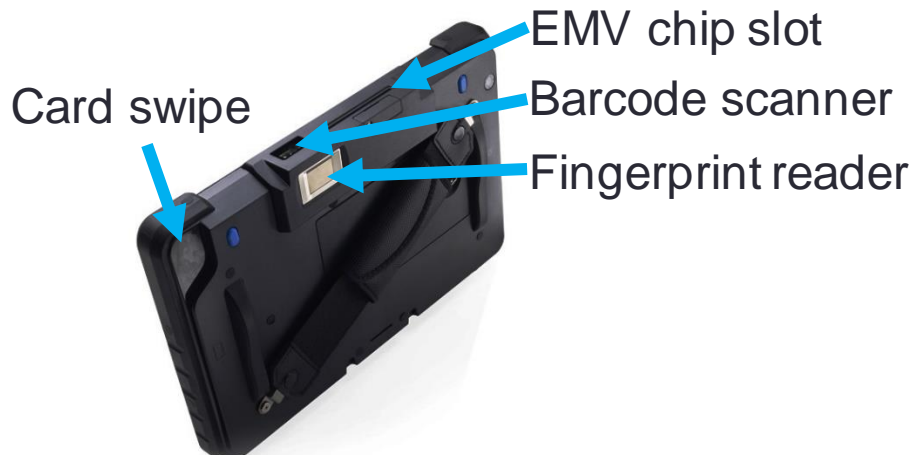
- Simplify the complicated process of selling firearms with the FastBound integration.
- Guaranteed compliance for firearm acquisition and disposition (A&D), an electronic 4473, and an electronic bound book with FastBound's FFL software.
- Receive and sell firearms in Paladin while simultaneously updating 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.
- Connect your store's database, printers and other peripherals via 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 with the bundle
- Compact 8-inch form factor makes device easy to hold and use
- Rugged tablet with water-resistant S Pen and screen

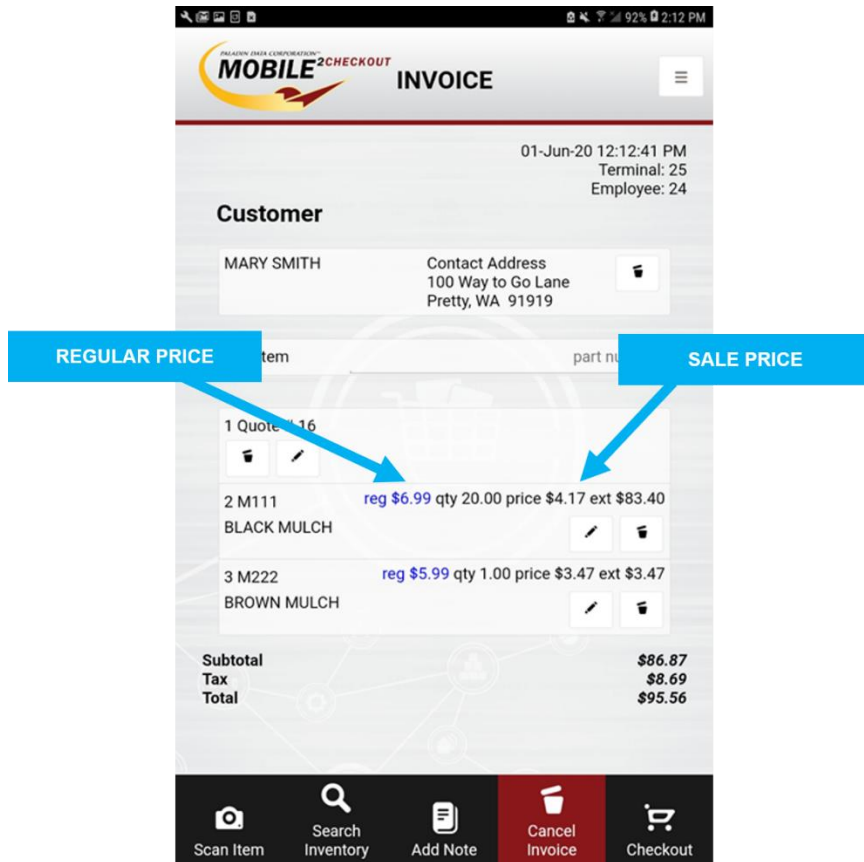
Ingenico Lane 7000/8000 payment terminals



- 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.

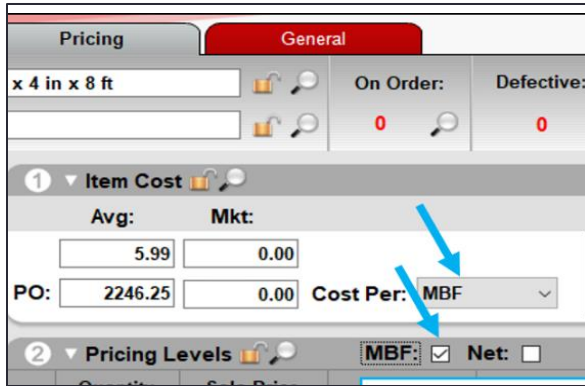
Mobile2Checkout app

- 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 and checkout on your mobile device
- **NEW!** Respect pricing plans and trade discounts.
- 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

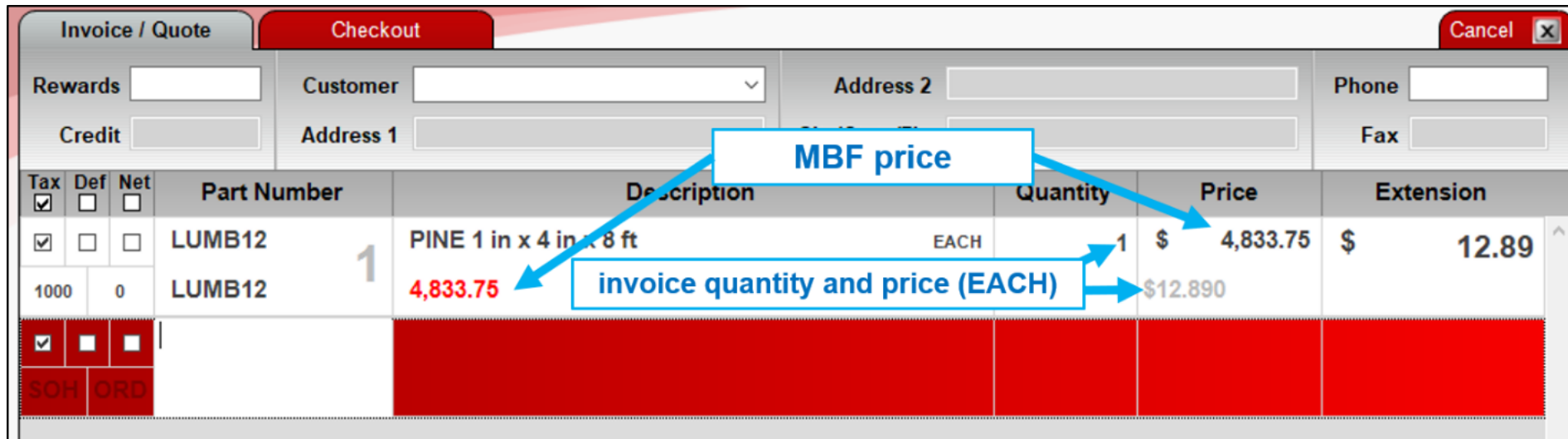
1 Item Cost

Avg: 5.99 Mkt: 0.00

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



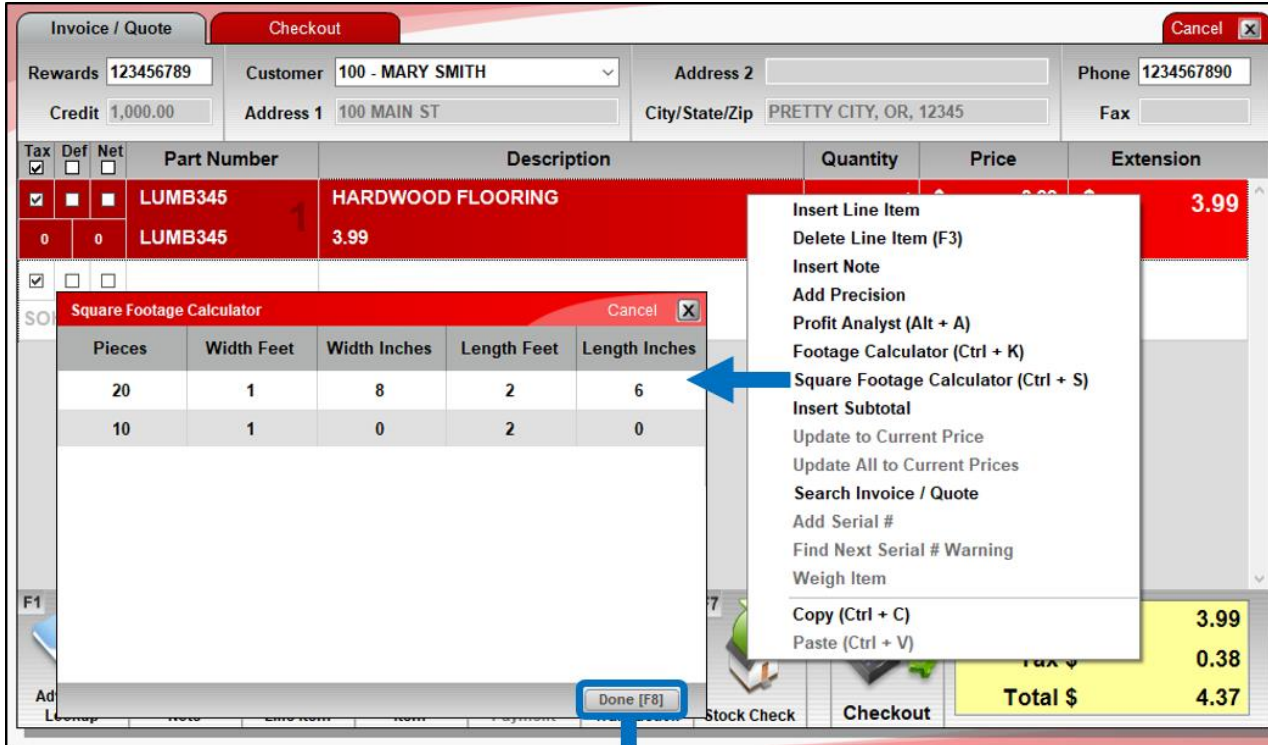
Invoice / Quote Checkout

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	1	\$ 4,833.75	\$ 12.89
1000	0		LUMB12			\$12.890	

SOH ORD

Square Footage Calculator



Invoice / Quote Checkout Cancel

Rewards: 123456789 Customer: 100 - MARY SMITH Address 2: Phone: 1234567890

Credit: 1,000.00 Address 1: 100 MAIN ST City/State/Zip: PRETTY CITY, OR, 12345 Fax:

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING			3.99
0	0	0	LUMB345	3.99			

Square Footage Calculator Cancel

Pieces	Width Feet	Width Inches	Length Feet	Length Inches
20	1	8	2	6
10	1	0	2	0

Done [F8]

Stock Check Checkout Total \$ 4.37

- 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

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING	EACH	103.40	\$ 3.99 \$ 412.57
0	0	0	LUMB345	3.99			
20@1-8.00X2-6.00 10@1-0.00X2-0.00				NOTES			

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

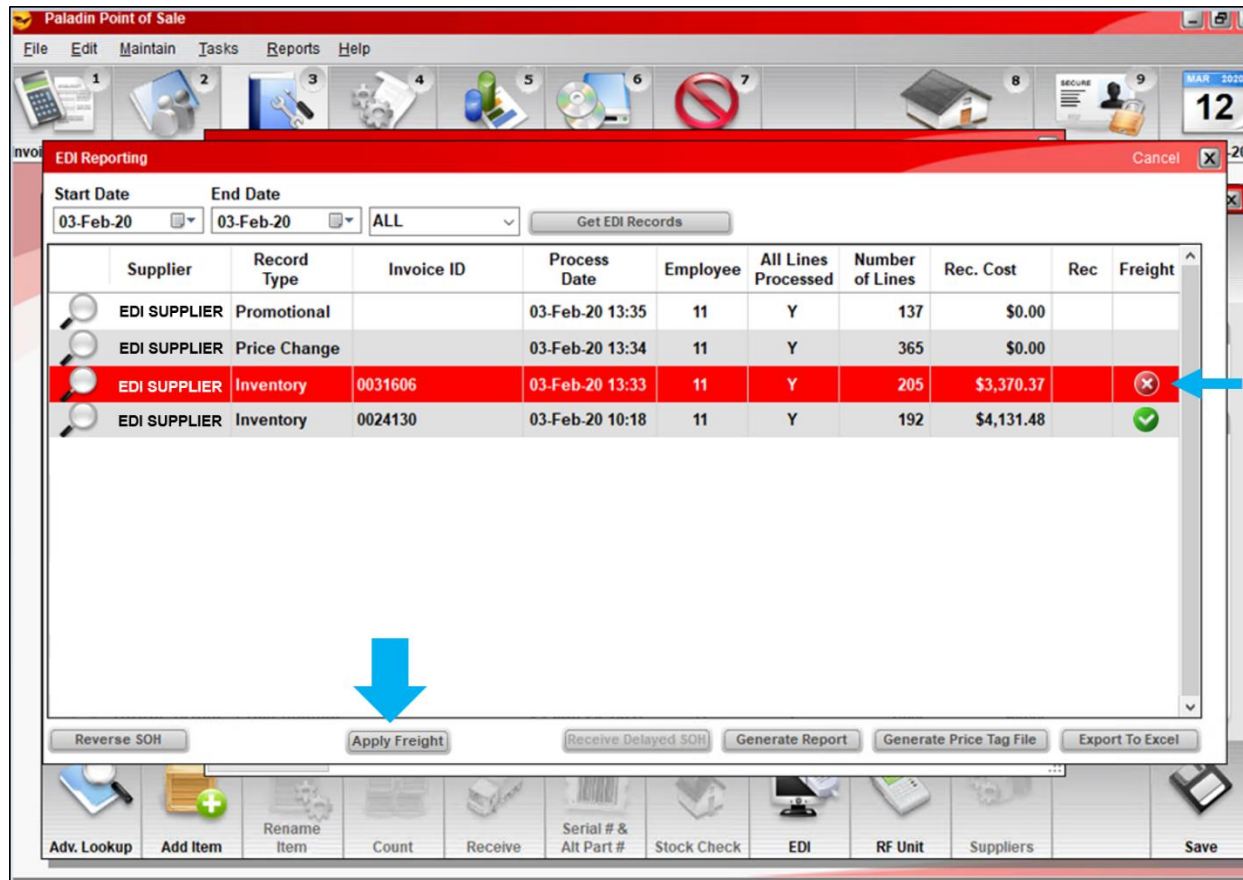
☐ Suspended Sale
 ☒ Quote — Order
 ☐

☐ 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**.

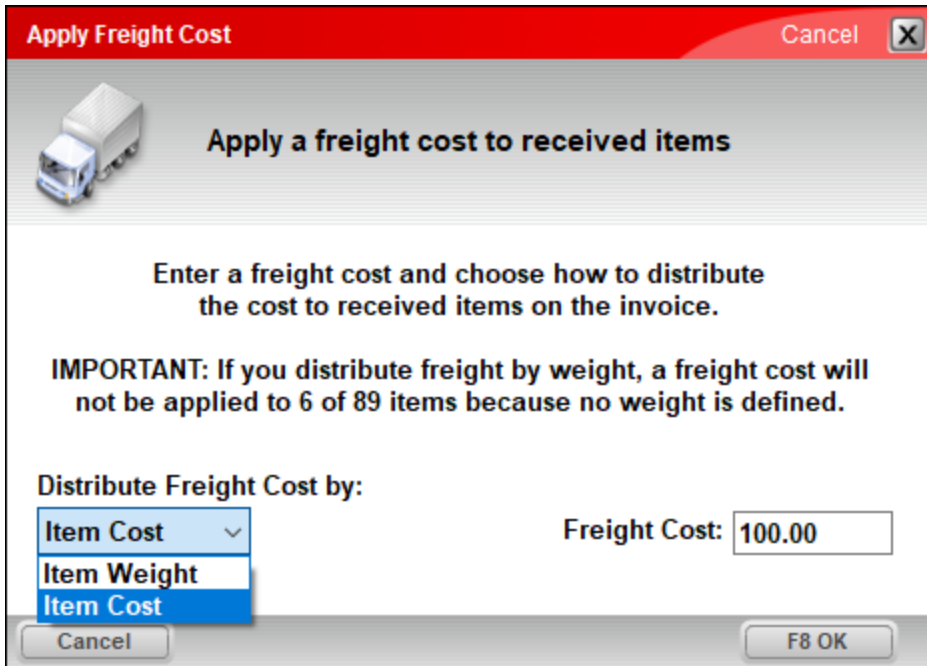
Apply freight cost to EDI invoice items



- 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

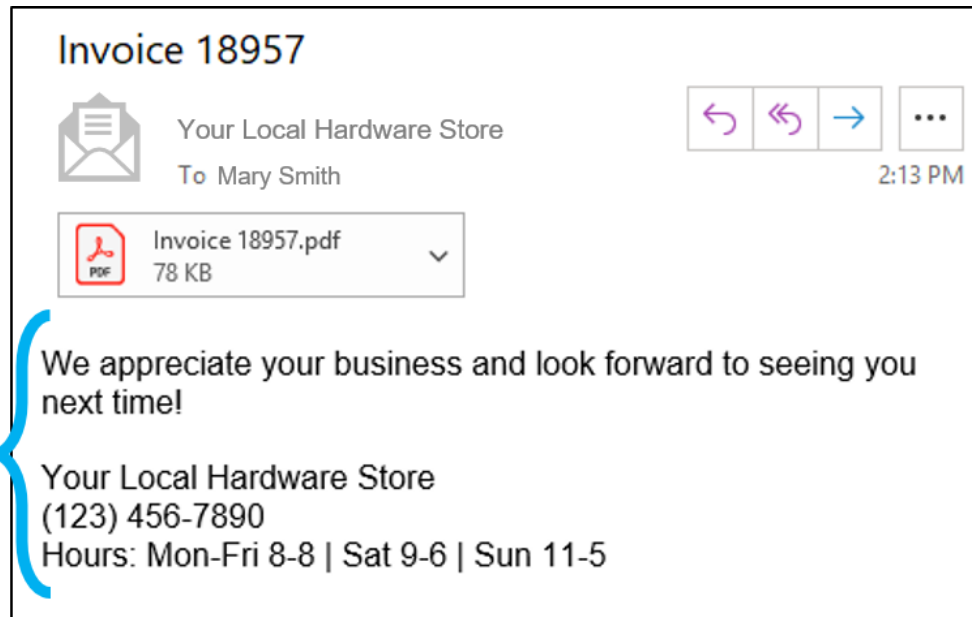
Freight Cost: 100.00

Cancel

F8 OK

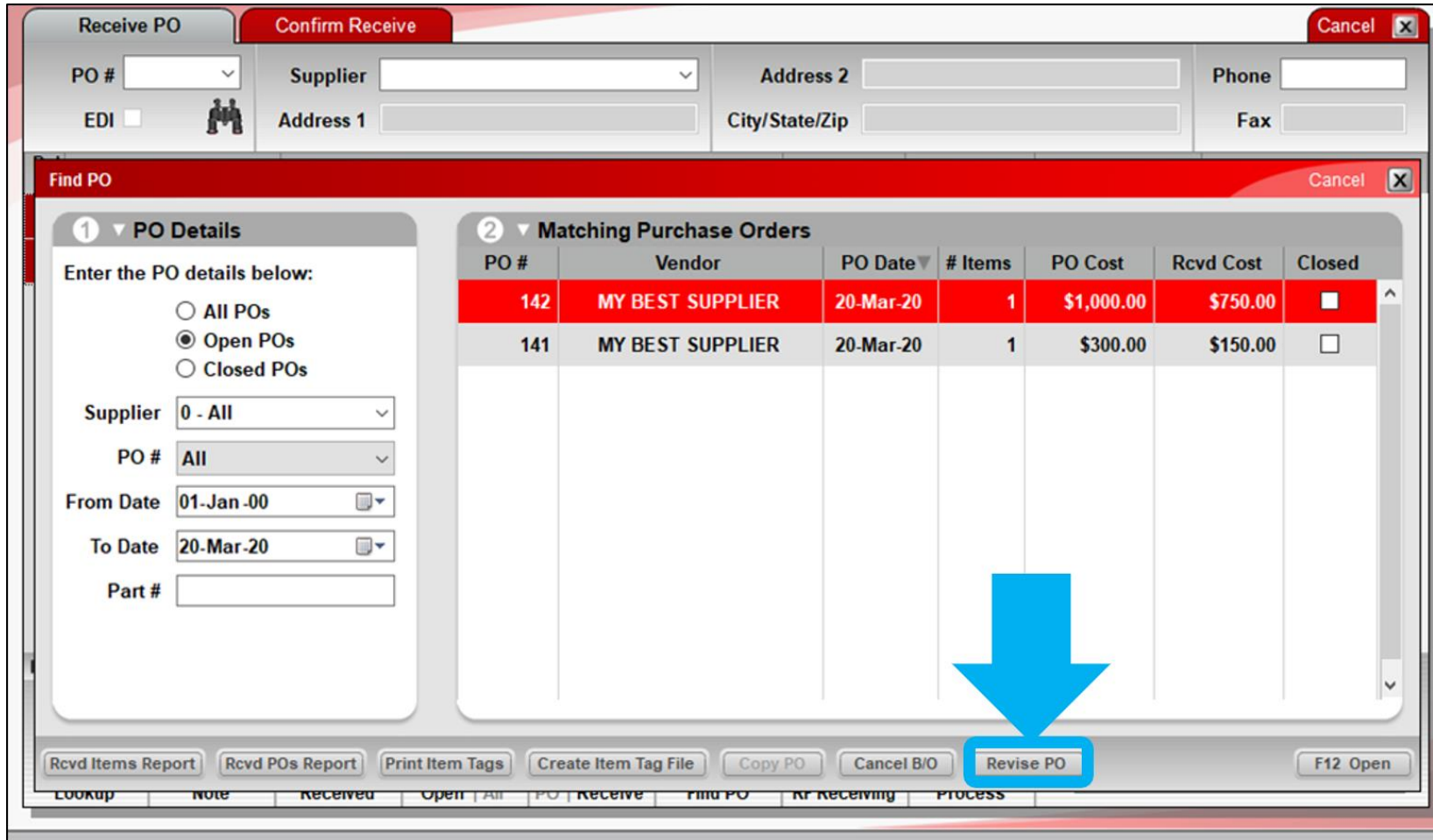
- Freight costs can be distributed by item cost or item weight.
- **Tip** It's a best practice to apply freight cost soon after the EDI invoice is processed and before received items are sold.

Customized email invoice messages



- Add custom 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

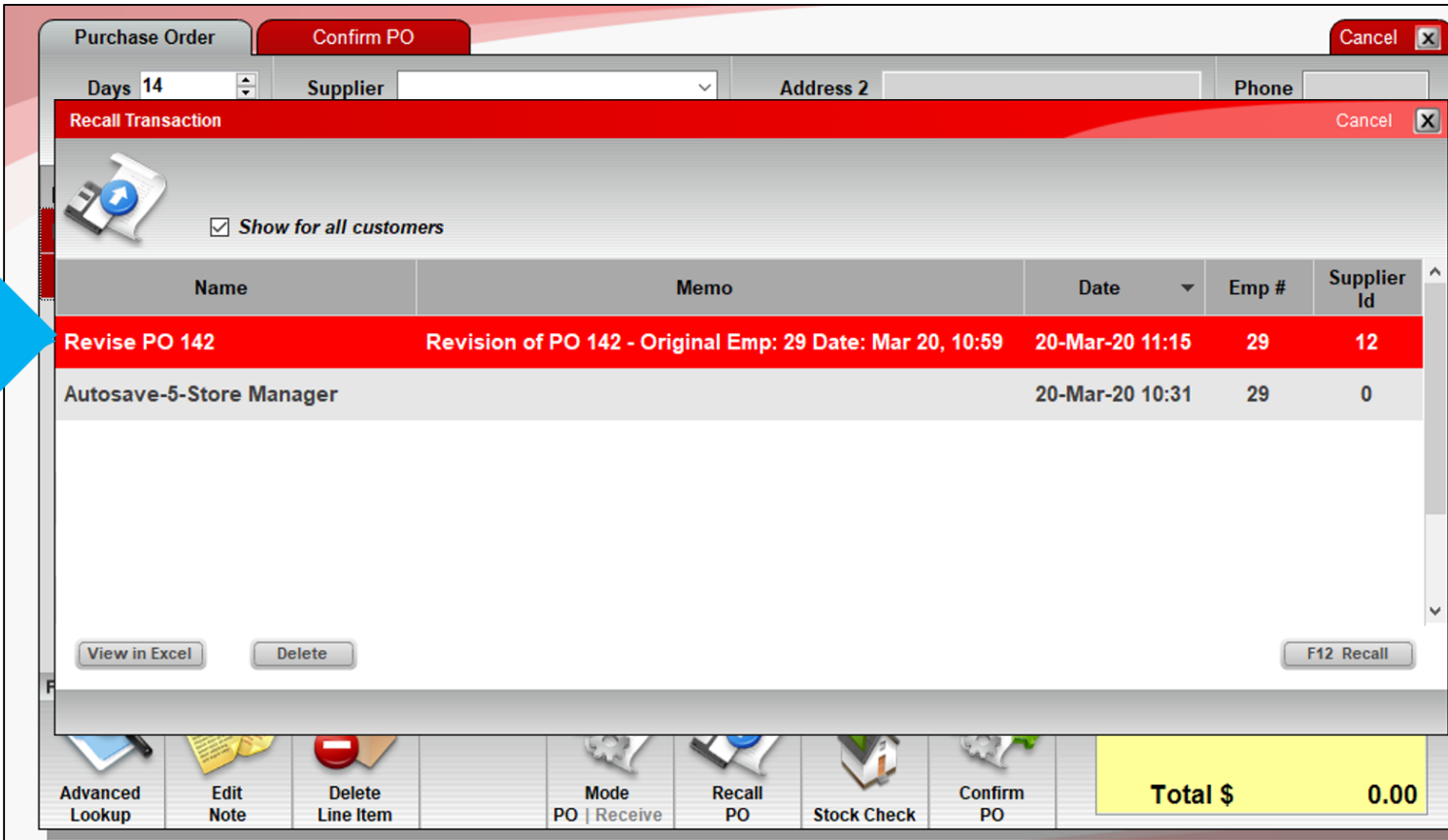


PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
142	MY BEST SUPPLIER	20-Mar-20	1	\$1,000.00	\$750.00	<input checked="" type="checkbox"/>
141	MY BEST SUPPLIER	20-Mar-20	1	\$300.00	\$150.00	<input type="checkbox"/>

- 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

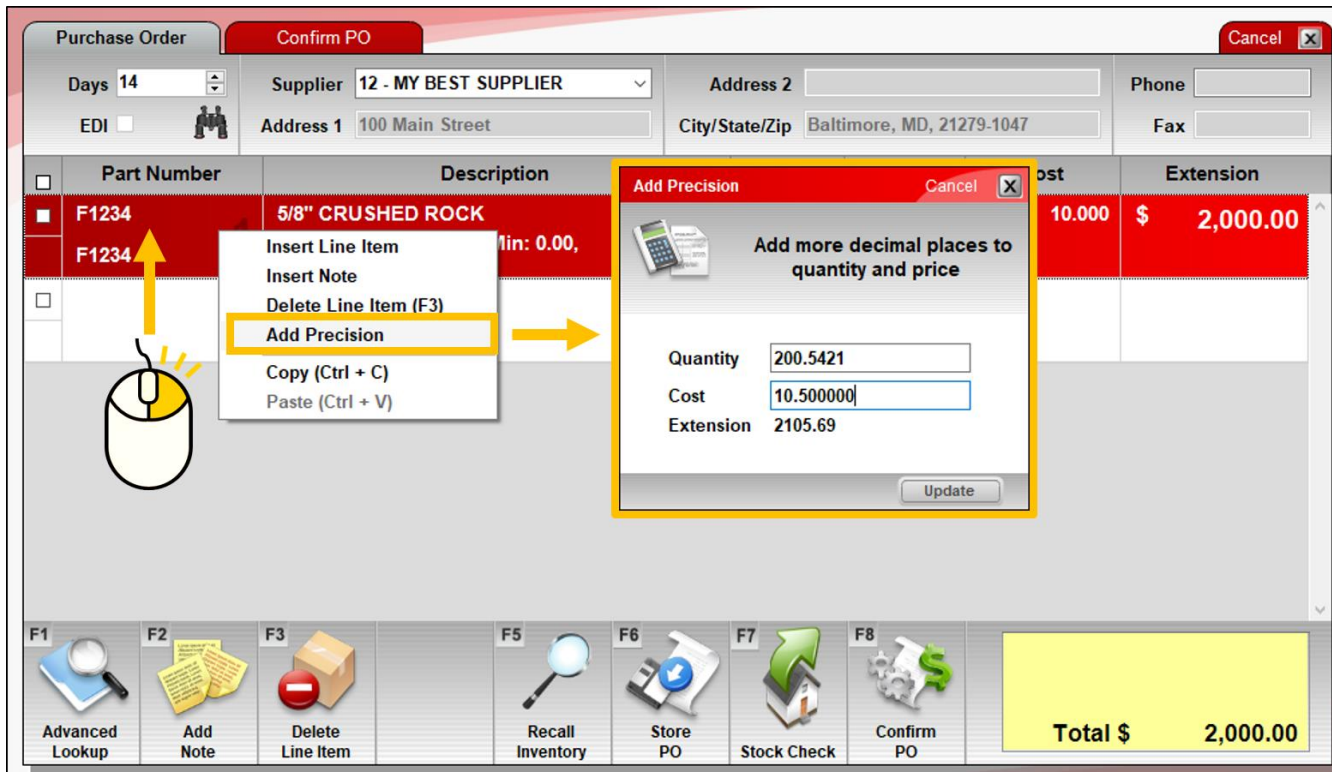
Recall PO

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), 'Phone', and 'Fax'. A table lists line items, with the first item being 'F1234 5/8" CRUSHED ROCK' with a quantity of 10.000 and a cost of \$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 a '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 mouse cursor is shown clicking on the 'Add Precision' option in the context menu. At the bottom of the window, there is a toolbar with icons for 'Advanced Lookup', 'Add Note', 'Delete Line Item', 'Recall Inventory', 'Store PO', 'Stock Check', and 'Confirm PO'. A yellow box at the bottom right shows 'Total \$ 2,000.00'.

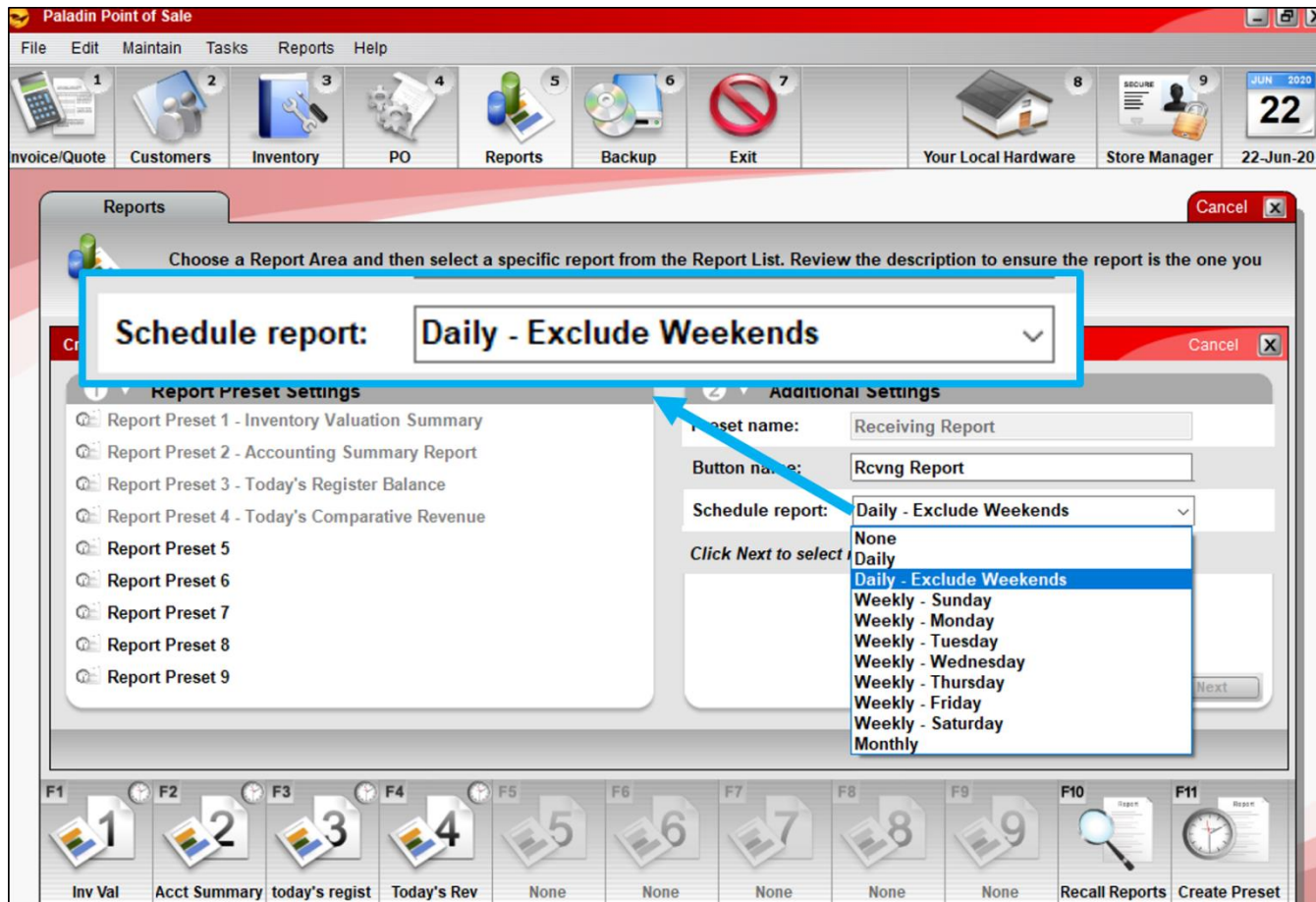
Part Number	Description	Quantity	Cost	Extension
F1234	5/8" CRUSHED ROCK	10.000	\$ 2,000.00	

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	<input type="radio"/> Terminal <input checked="" type="radio"/> Employee	
Export to Excel?	<input checked="" type="checkbox"/>	

AutoSave Off Book2 - Excel

File Home Insert Draw Page La Formulas Data Review View Add-ins Help Team Search

H11 ✕ ✓ f_x 45.3

	C	D	E	F	G	H	I
1	Invoice #	Date	Card Number	Card Type	Name	Amount	Auth Number
2	9993	01-Feb-20 8:29:55 AM	*****0441	VISA	MARY SMITH	2.69	111111
3	10023	02-Feb-20 8:50:33 AM	*****1060	VISA	DAVID OWEN	14.99	222222
4	10029	02-Feb-20 10:06:24 AM	*****1893	VISA	JOHN DOE	78.38	333333
5	10039	02-Feb-20 12:09:00 PM	*****6987	VISA	SUSAN BLACK	19.99	444444
6	10041	02-Feb-20 12:16:17 PM	*****3551	M/C	SARAH JONES	149.56	555555
7	10051	02-Feb-20 1:59:21 PM	*****8813	VISA	BOBBY WHITE	4.49	666666

Report Settings **All Employees** Employee 2 Employee 3 Card Type Details ...

Ready Display Settings 100%

- 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	13:53
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 Ace Rewards, Rich Rewards or Repeat Rewards.
- Create a new no-rewards class (method varies by rewards program), 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 instead of manually-enter the card number, when you start the on-file process, in the **Device Manager** window, clear (deselect) the **Manual Entry** checkbox that is selected by default.

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

portal.paladinpos.com/new-features/summer-2020



Next Webinar:

Streamline Firearms Sales with FastBound

August 18 @ 9am PT

Register: portal.paladinpos.com/webinars



Check out our Summer 2020 Release Guide on the Help Portal.

Expand your Paladin Knowledge:

Stay relevant in retail:
paladinpointofsale.com/retailsience

Self help at:
portal.paladinpos.com

Webinars available at:
portal.paladinpos.com/webinars

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