



Virtual User Meeting – Spring 2021



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Chief Experience Officer
March 9, 2021

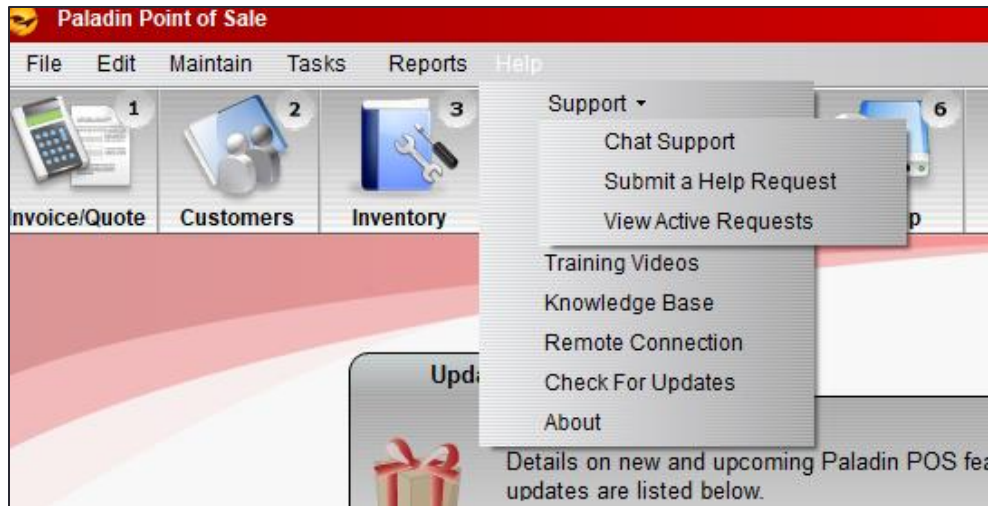
WHAT YOU'LL LEARN

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
- New Ace features
- Coming Soon!

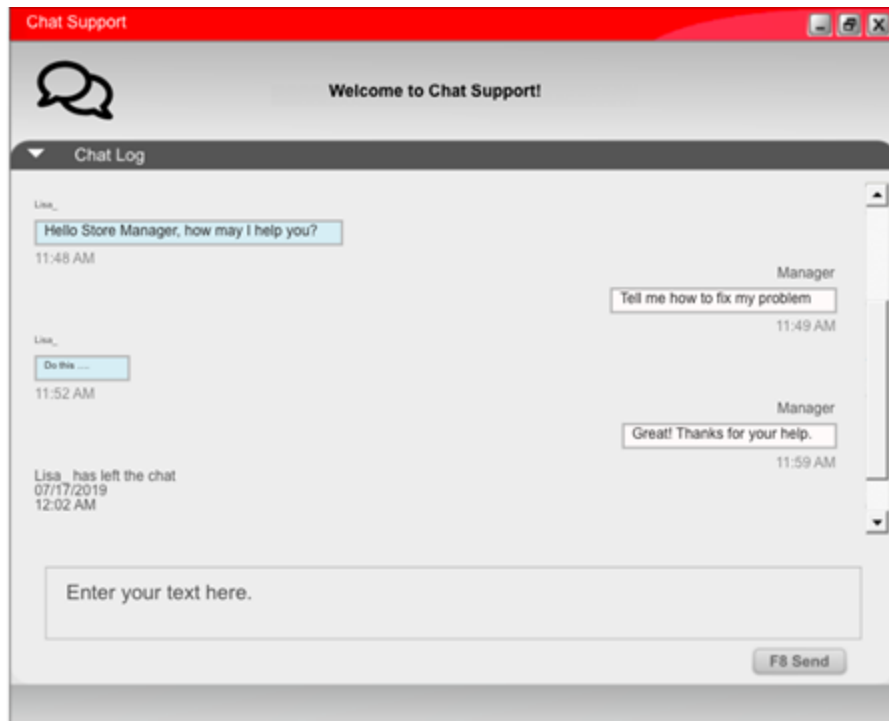
The New Help Request Portal

The new Help menu category: “Support”



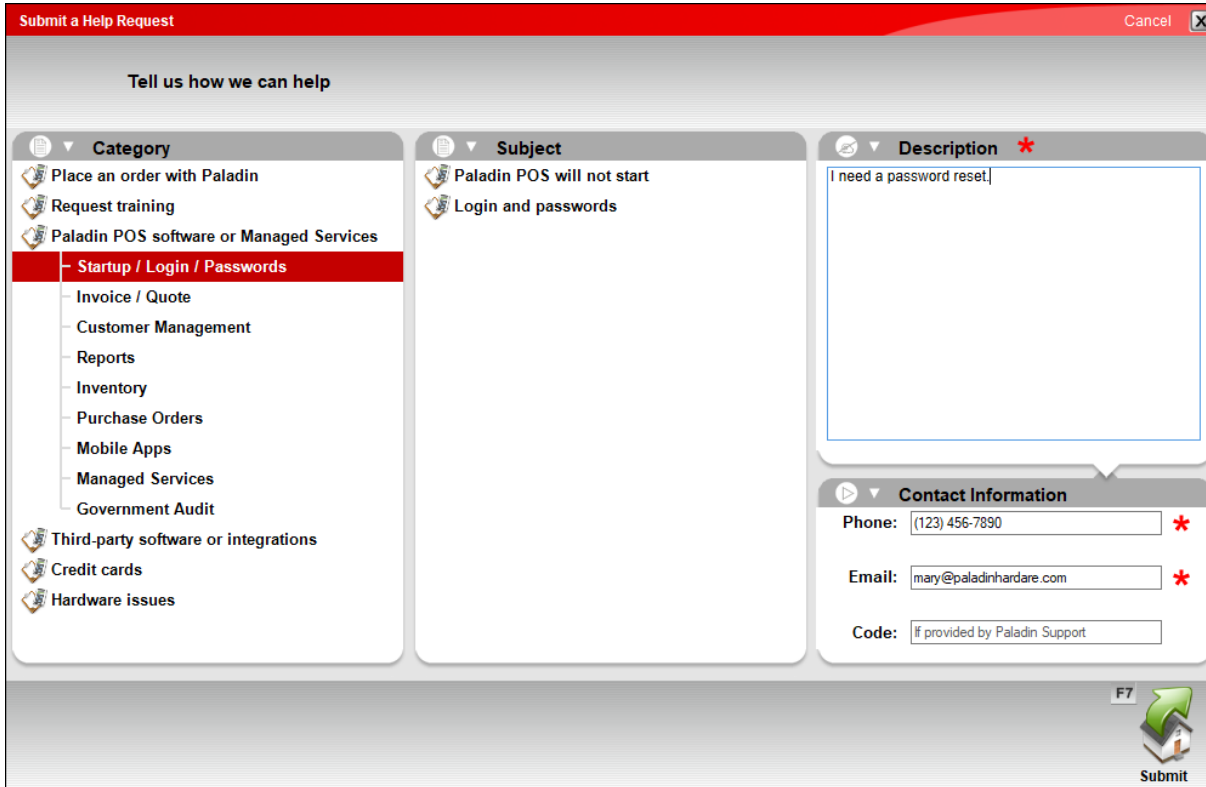
- A new **Support** category on the **Help** menu provides access to multiple support features:
- **Chat Support** gets you immediate help and quick answers to simple questions.
- **Submit a Help Request** lets you request help for more complex issues or when Chat Support is not available. This menu 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 – 5:30 PM PT, 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, 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".

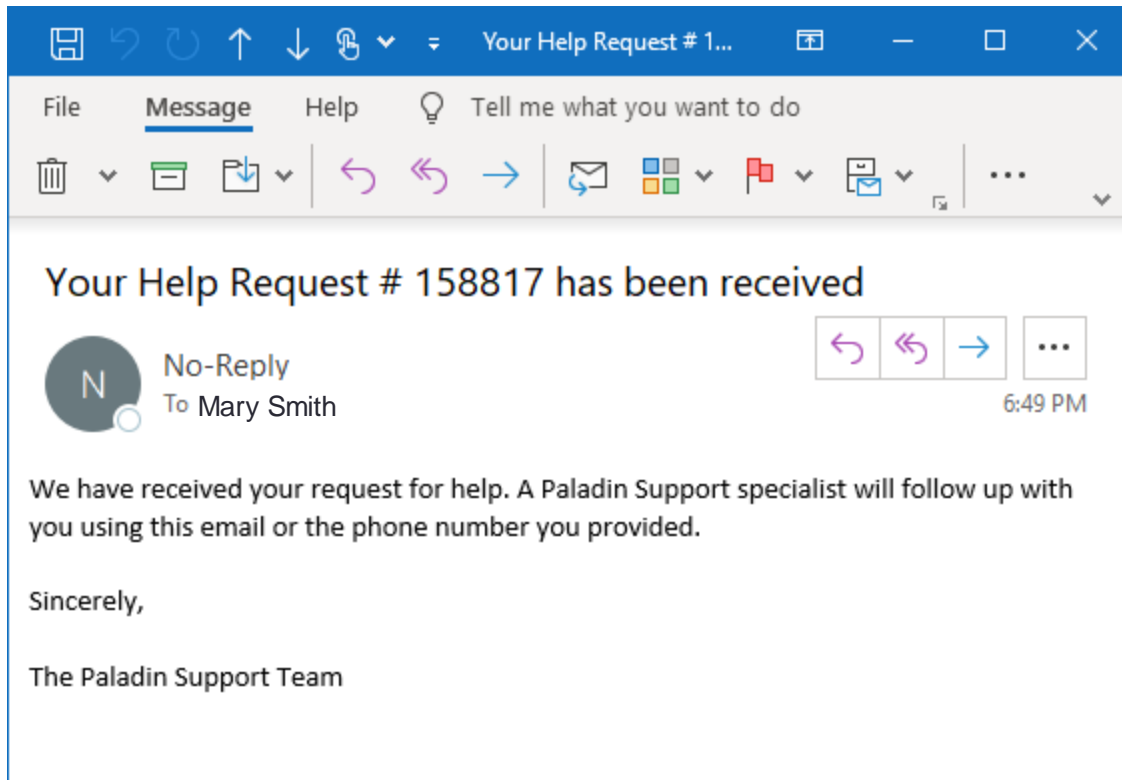
Below the "Description" section is a "Contact Information" section with three fields:

- 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 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.

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



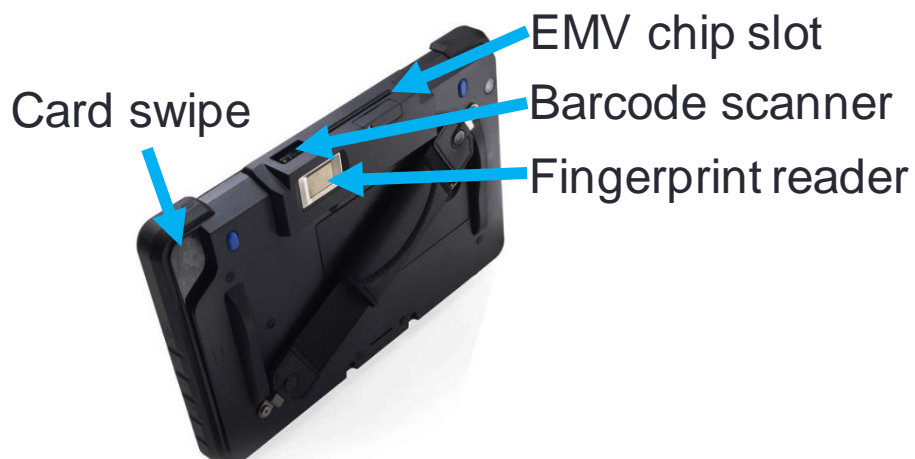
- Simplify the complicated process of selling firearms with the FastBound integration.
- Guaranteed compliance for firearm acquisition and disposition (A&D), an electronic 4473, and an electronic bound book with FastBound's FFL software.
- Receive and sell firearms in Paladin while simultaneously updating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

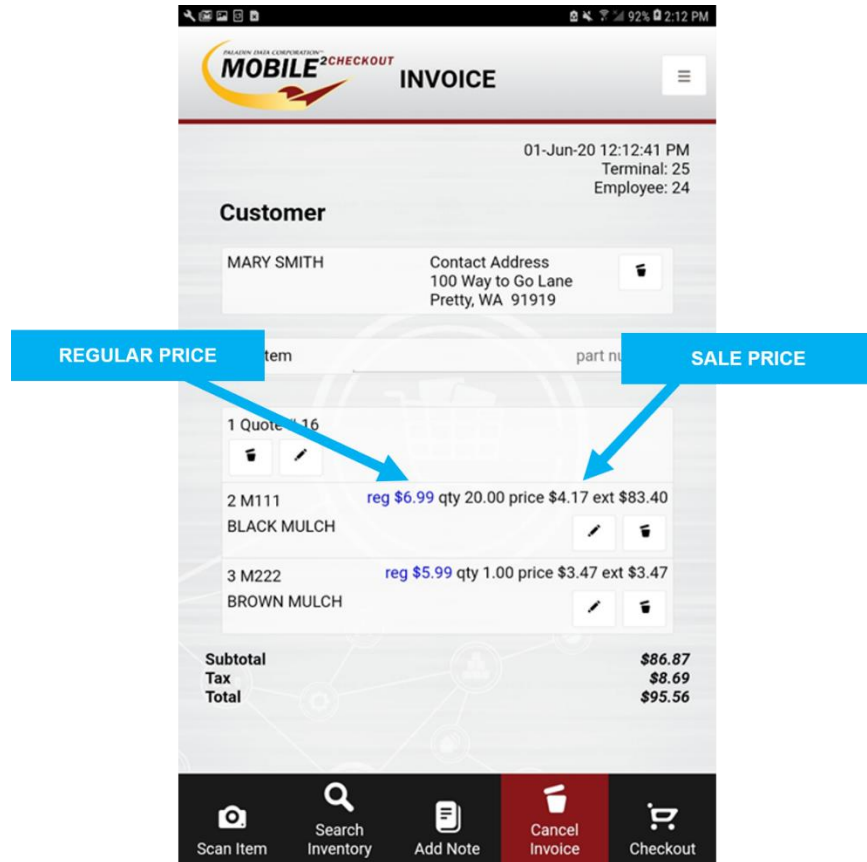


Card reader

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.
- Accept all major payment types, including touchless, and features a stylus for quick signature capture.

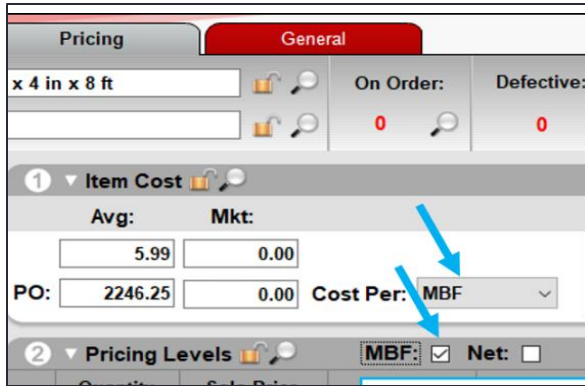
Verifone P400 payment terminals



- Upgrade for the Verifone VX 805.
- Nimble and customizable checkout device.
- Features a conventional pin pad and a color touchscreen.
- New user interface makes customer checkout quick and easy.
- Certified for Worldpay EMV.

New point of sale features you can use now

Show MBF, MSF and Ton prices on quotes/invoices



Pricing General

x 4 in x 8 ft

On Order: 0 Defective: 0

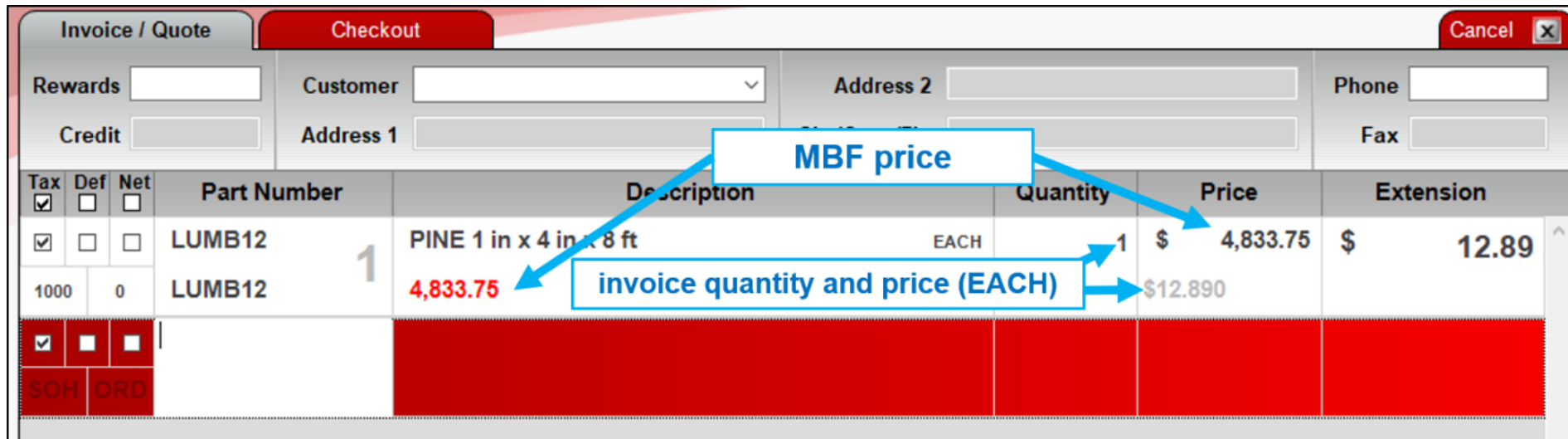
1 Item Cost

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.)



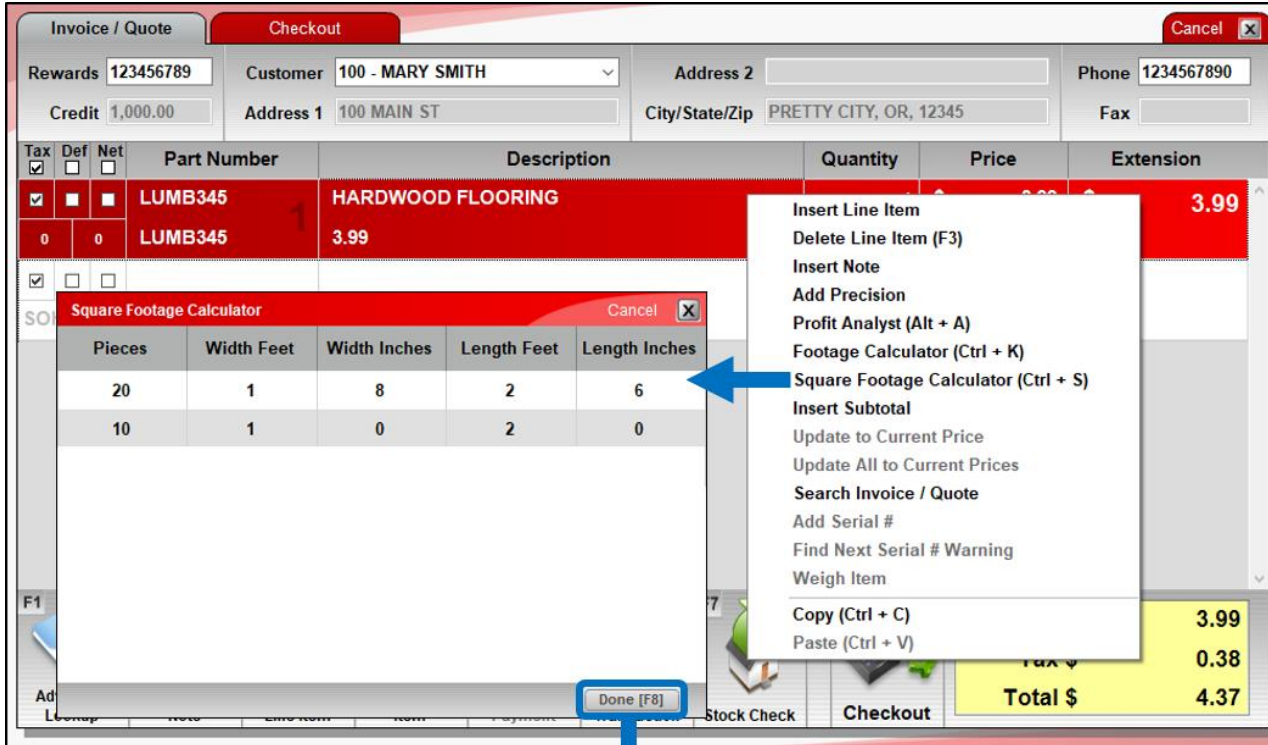
Invoice / Quote Checkout

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

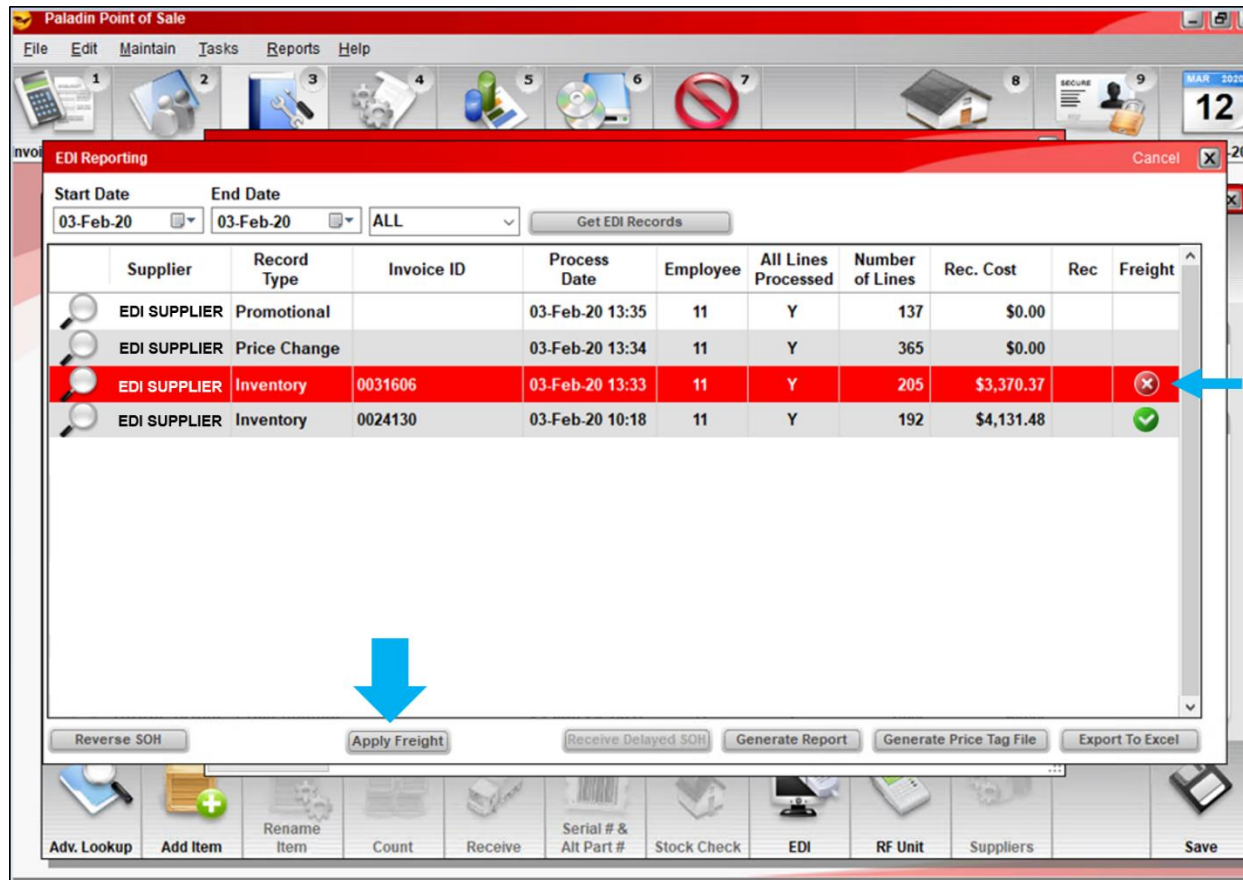
☐ Suspended Sale
 ☒ Quote — Order
 ☐

☐ 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**.

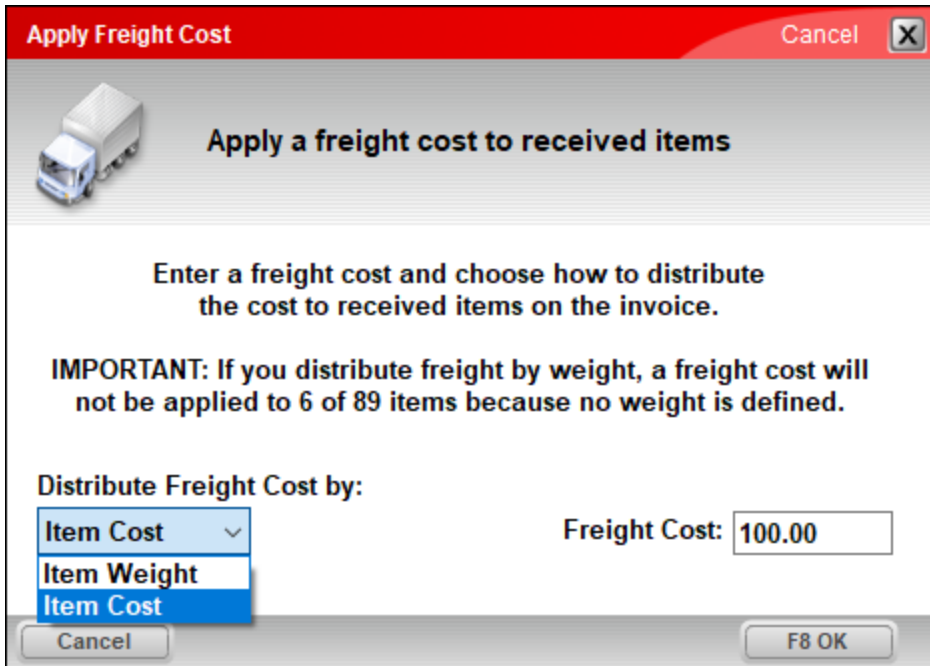
Apply freight cost to EDI invoice items



- 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:

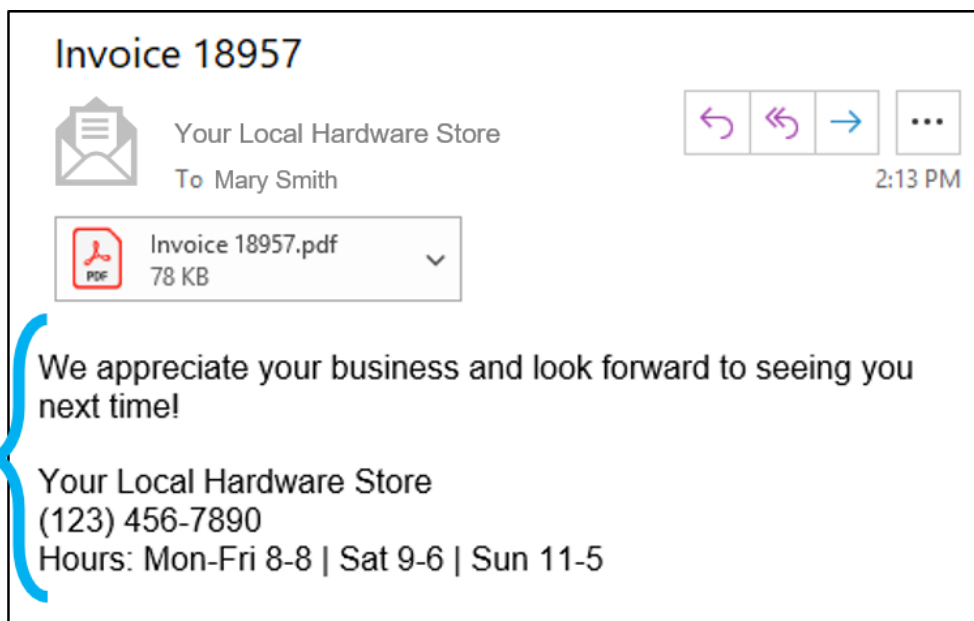
Item Cost
Item Weight
Item Cost

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.

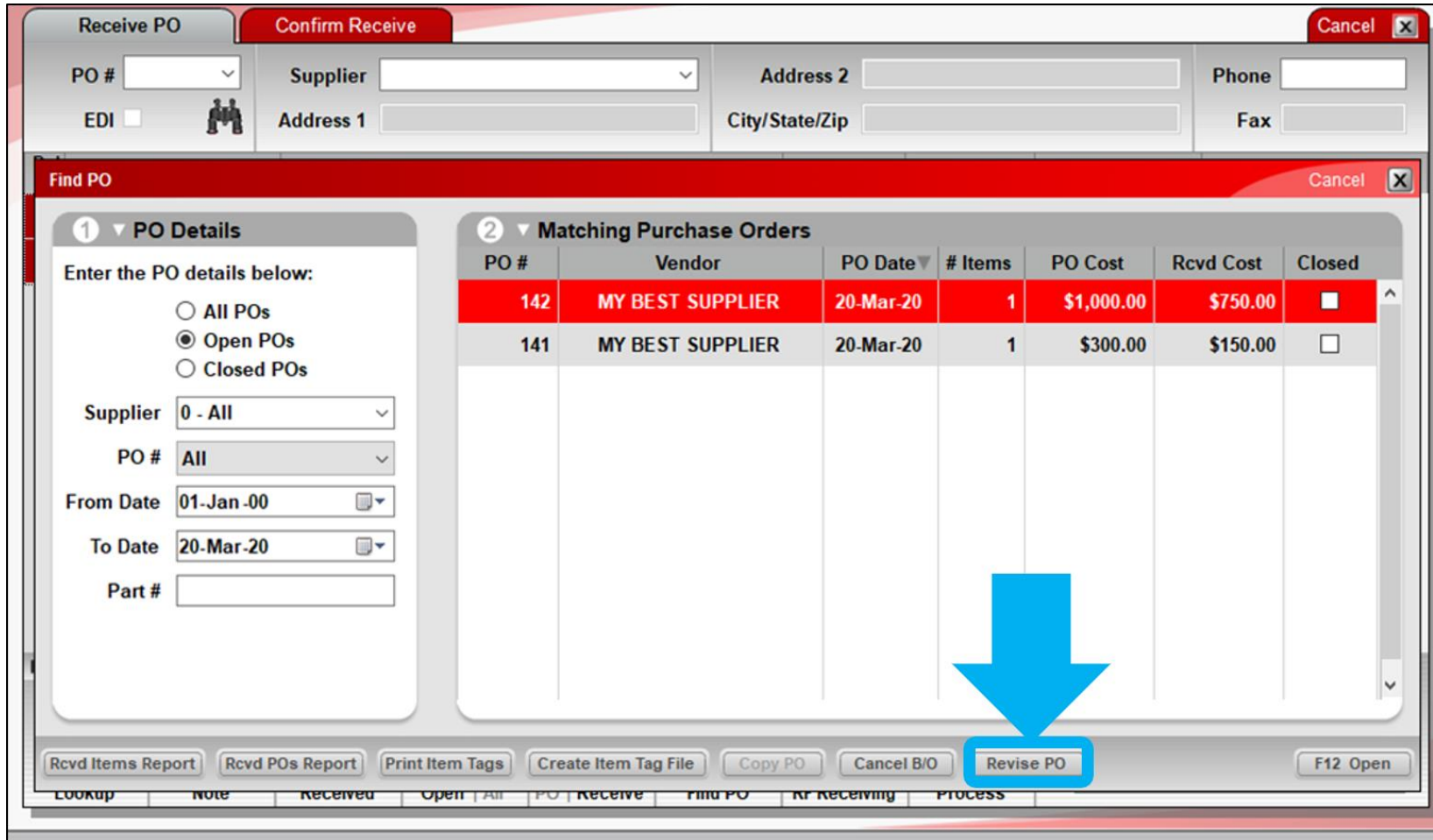
Customized email invoice messages



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"/>

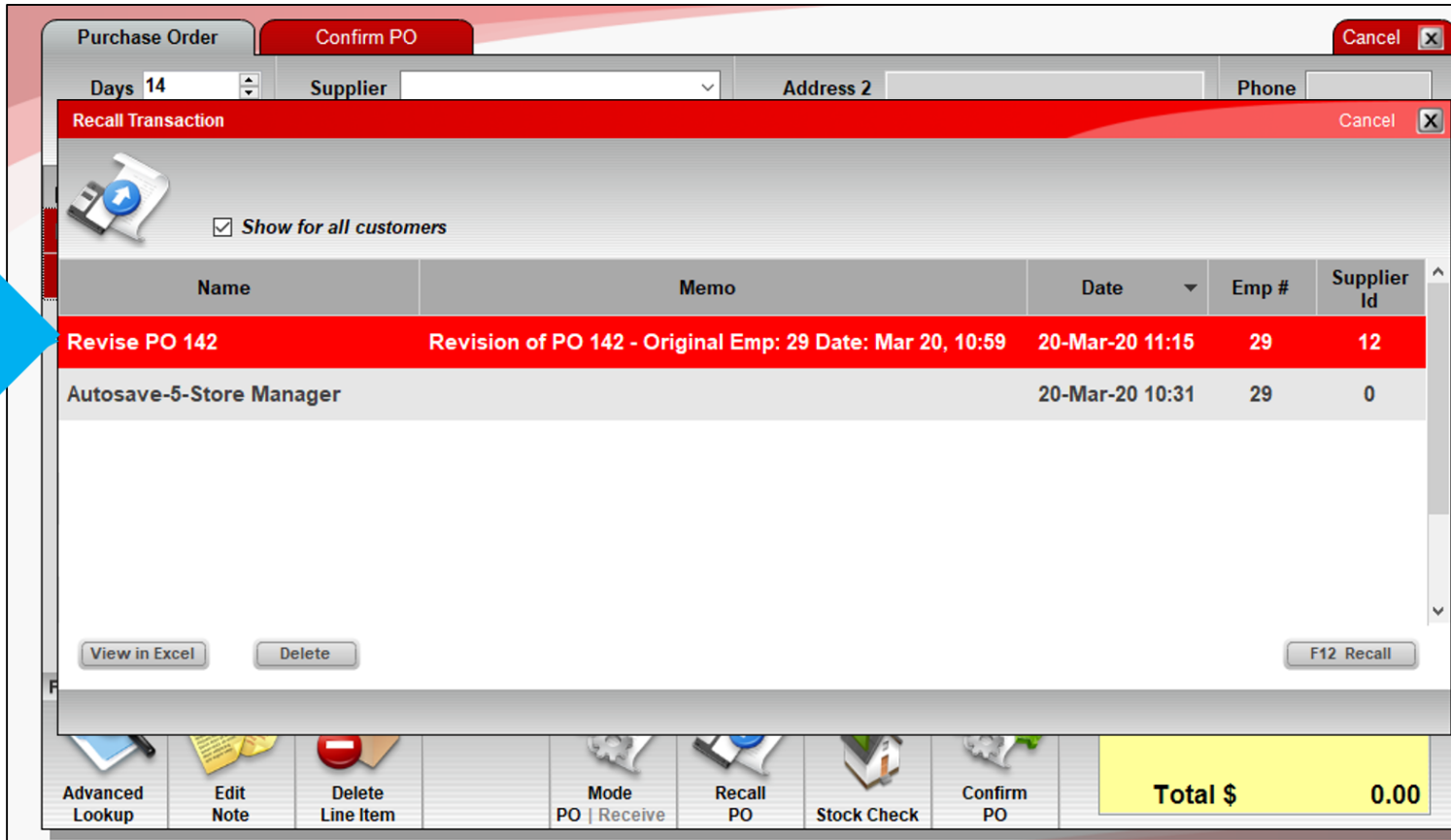
Rcvd Items Report | Rcvd POs Report | Print Item Tags | Create Item Tag File | Copy PO | Cancel B/O | Revise PO | F12 Open

Lookup | Note | Received | Open | All | PO | Receive | Find PO | Rcvd | Receiving | Process

- 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

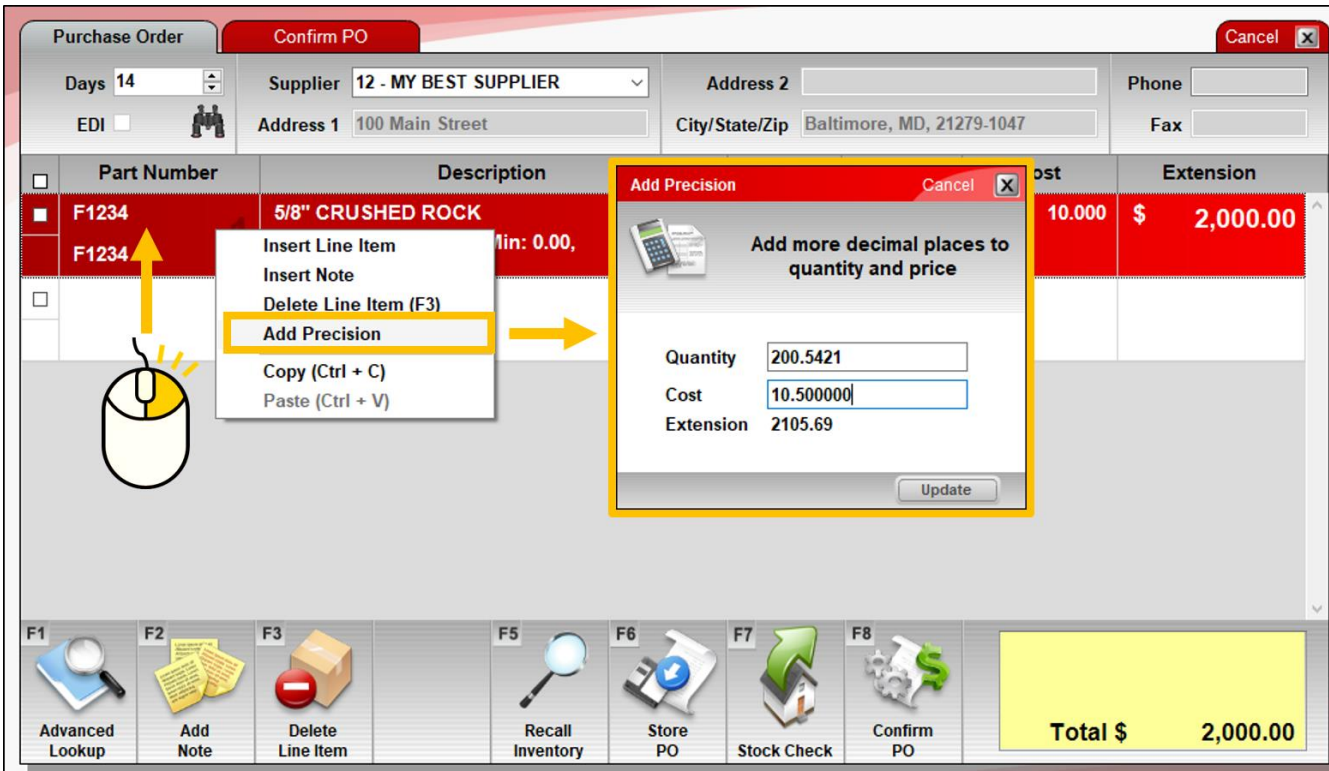
- The new PO name is prefixed with “Revise PO” and contains the prior PO’s #.
- It appears automatically in the **Recall Transaction** window.



The screenshot shows a software interface for managing purchase orders. At the top, there are tabs for 'Purchase Order' and 'Confirm PO'. Below these are input fields for 'Days' (set to 14), 'Supplier', 'Address 2', and 'Phone'. A 'Recall Transaction' window is open, displaying a list of transactions. The first transaction, 'Revise PO 142', is highlighted in red and is the focus of a blue arrow. Below it is a transaction for 'Autosave-5-Store Manager'. At the bottom of the window, there are buttons for 'View in Excel', 'Delete', and 'F12 Recall'. A taskbar at the very bottom contains icons for 'Advanced Lookup', 'Edit Note', 'Delete Line Item', 'Mode PO | Receive', 'Recall PO', 'Stock Check', 'Confirm PO', and a 'Total \$ 0.00' display.

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

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

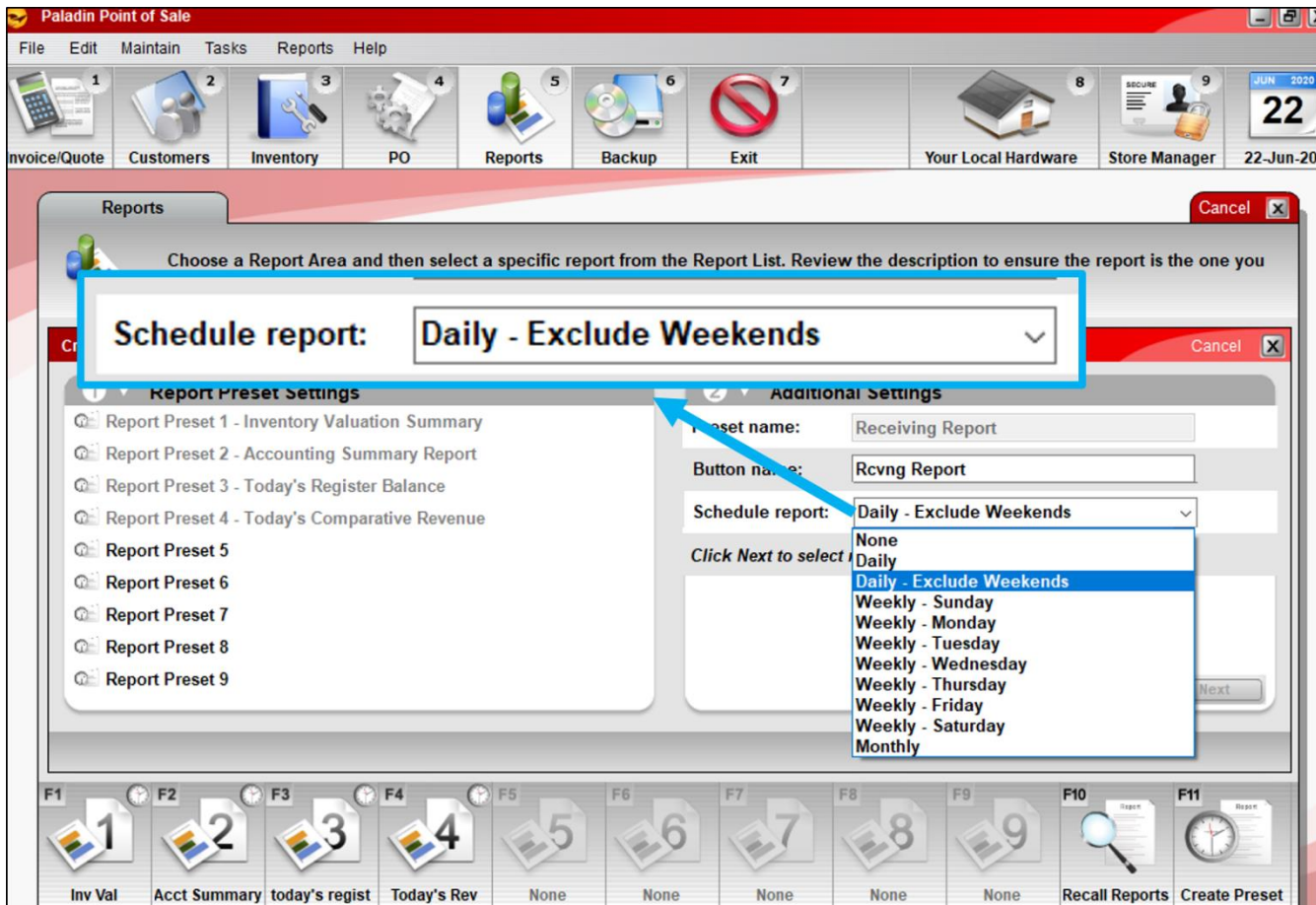
The bottom toolbar includes the following icons and labels:

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

The total amount is displayed as **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? ☒ 

AutoSave ☐ Off Book2 - Excel

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

H11 45.3

	C	D	E	F	G	H	I
	Invoice #	Date	Card Number	Card Type	Name	Amount	Auth Number
1	9993	01-Feb-20 8:29:55 AM	*****0441	VISA	MARY SMITH	2.69	111111
2	10023	02-Feb-20 8:50:33 AM	*****1060	VISA	DAVID OWEN	14.99	222222
3	10029	02-Feb-20 10:06:24 AM	*****1893	VISA	JOHN DOE	78.38	333333
4	10039	02-Feb-20 12:09:00 PM	*****6987	VISA	SUSAN BLACK	19.99	444444
5	10041	02-Feb-20 12:16:17 PM	*****3551	M/C	SARAH JONES	149.56	555555
6	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	13:33
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

Customer

Address 2

Phone

Credit

Address 1

City/State/Zip

Fax

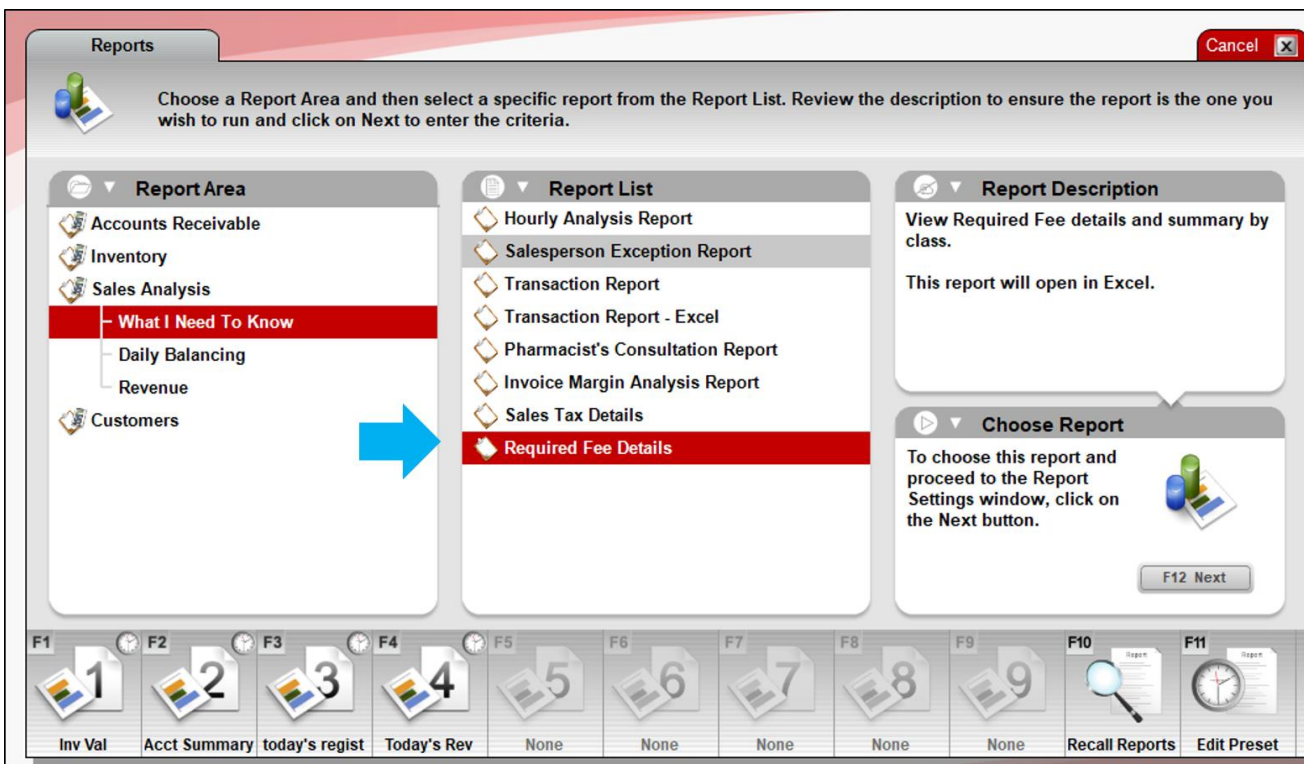
Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N1234	LAYTEX PAINT 5 GAL	1	\$ 45.00	\$ 45.00
100	0		N1234	45.00			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	REQUIRED FEE	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	Cancel
Part # P1234	Desc 1 PEST FREE 5 LB	On Order: 0	Defective: 0	On Hold: 0
Alt #	Desc 2		Stock On Hand: -112	
Sales Details Investment: \$0.00 Gross Profit: \$2,120.00 ROI: 100%		Classes Class: 400 - GARDEN CHEMICA Subclass: 0 - None		
Forecast Stock Days: 14 Need: 212 Cost: \$2,120.00		Item Information Autotext: Required Fee: 0.50 Location: 0 - None Dept: 112 - LAWN & GARDEN U/M: 1 - EACH Weight: 0.00 C/U Qty: 1.00		
Overstock Overage: 0 Waste: \$0.00		Tax Code: 0 - None # Bintags: 1 Item Tag Required: <input type="checkbox"/>		
Shrinkage Shrinkage: 0 Loss: \$0.00 Reviewed: 03-Sep-20		Print Later: <input checked="" type="checkbox"/> Print Bntag Print Item Tag: <input type="checkbox"/> Print Sign		

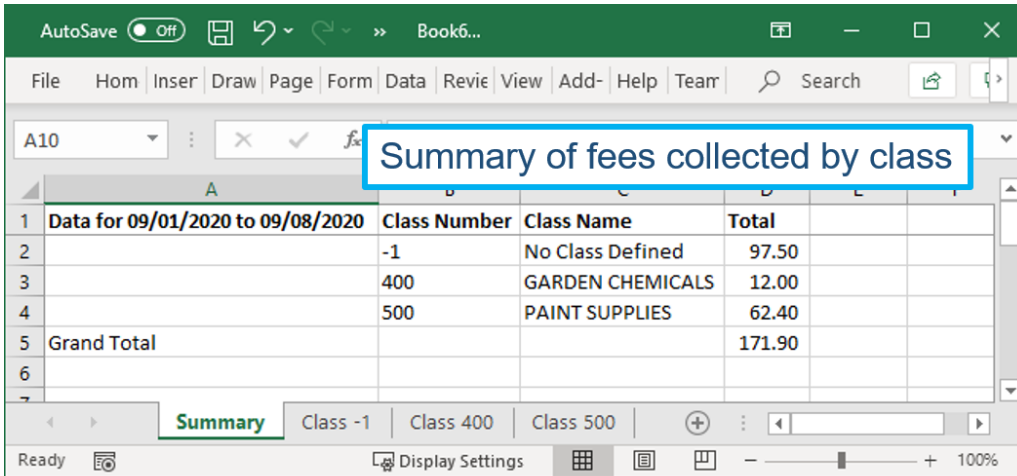
F1 Adv. Lookup
F2 Delete Item
F3 Rename Item
F4 Count
F5 Receive
F6 Serial # & Alt Part #
F7 Stock Check
F8 EDI
F9 RF Unit
F10 Suppliers
F11 Save

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.

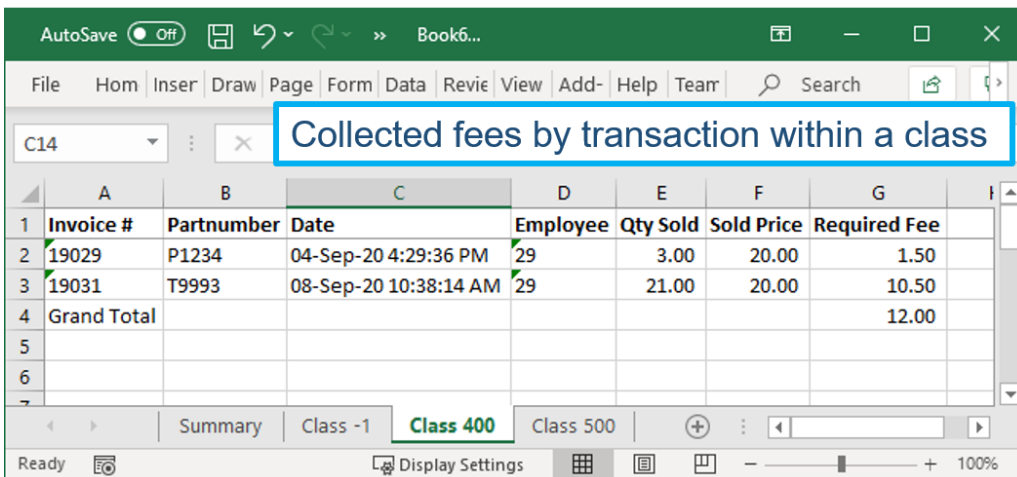
New item fee details report



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



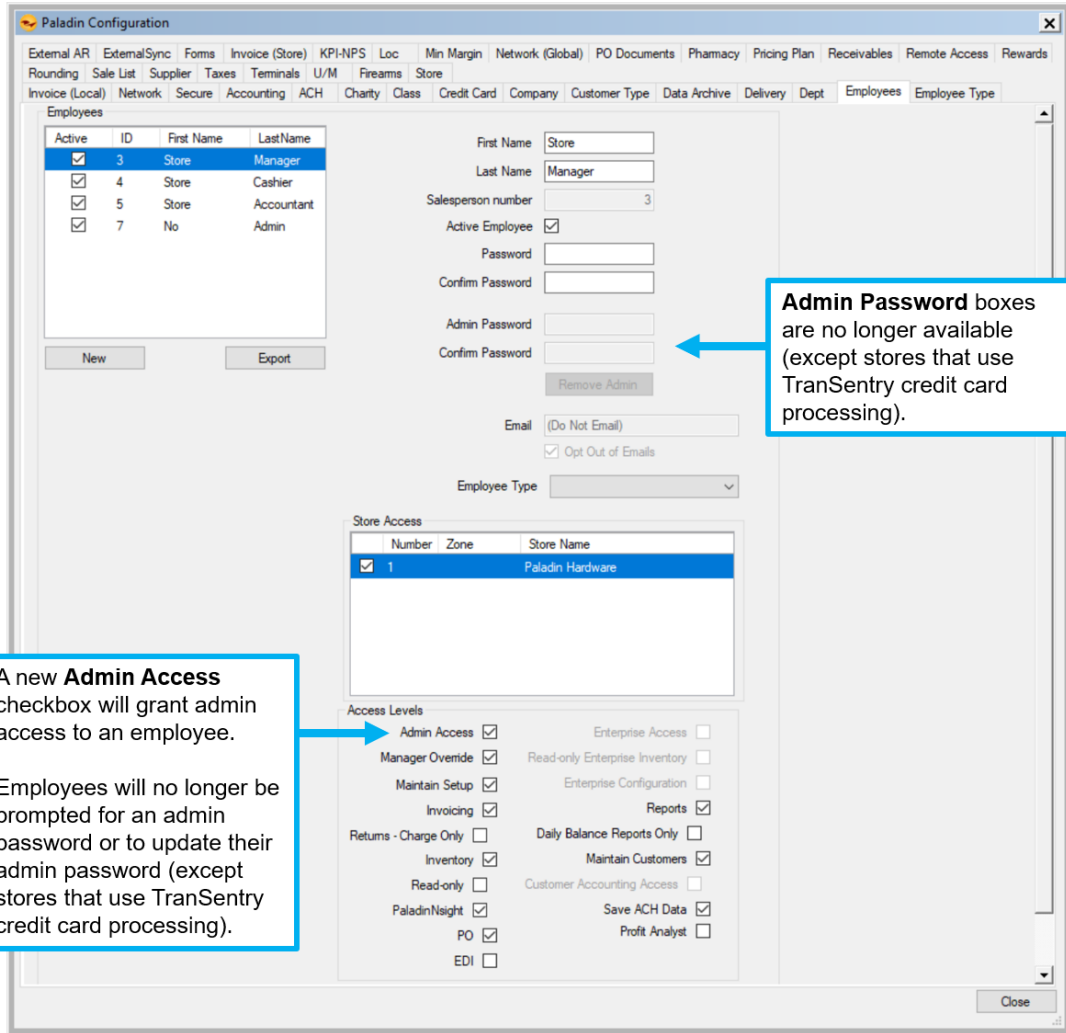
Collected fees by transaction within a class

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	LastName
<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 Admin 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

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

Close

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

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).

- 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
TOTAL \$	27.61

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

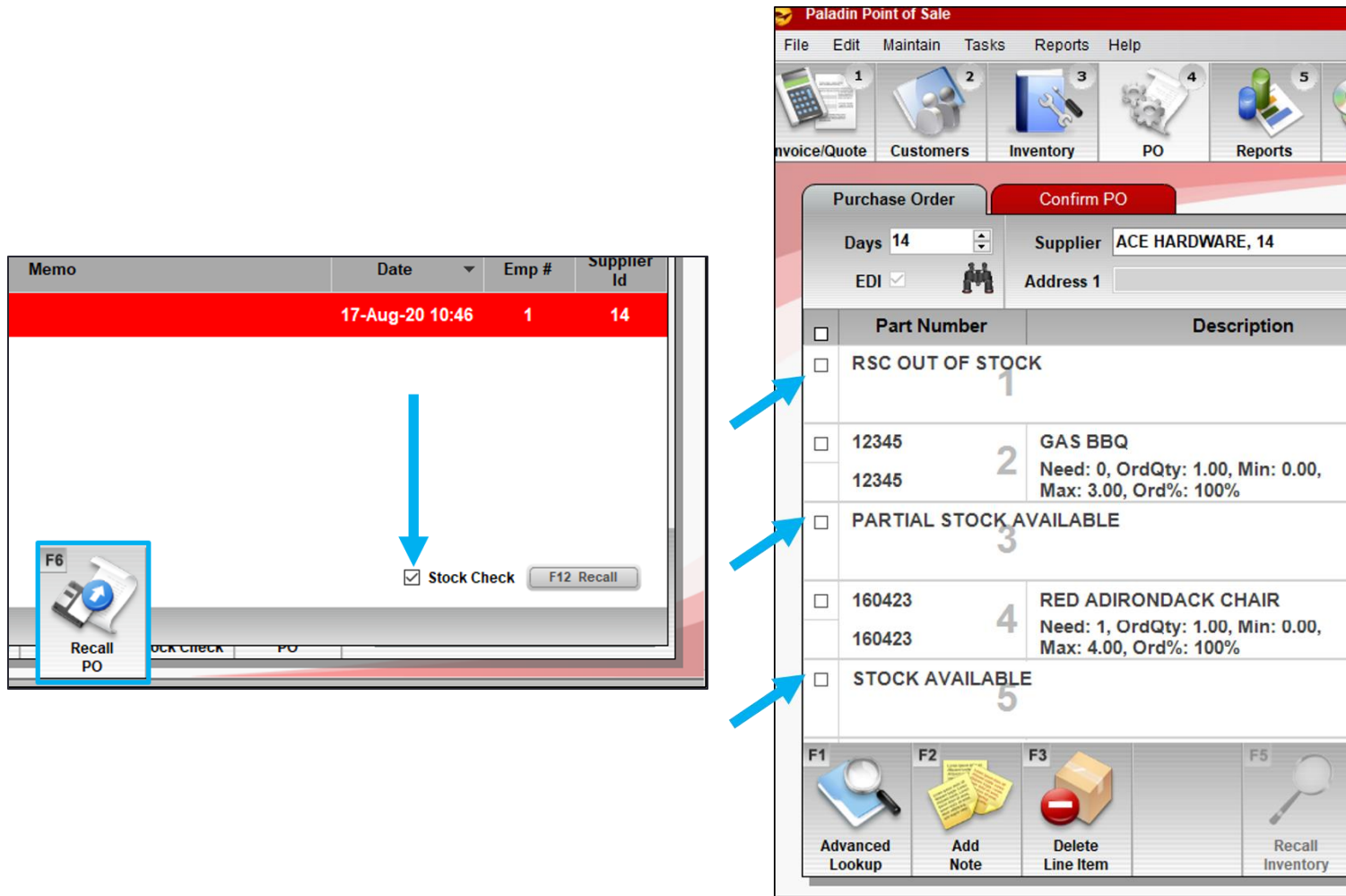
EMPLOYEE	TERM	INV#	TIME	DATE
29	7	19039	10:19	25-Sep-20

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.

New Ace Hardware features

Ace real-time RSC availability for POs



- Automatically sort purchase order items by real-time Retail Service Center (RSC) availability.
- Items are divided into these categories:
 - RSC Out of Stock
 - Partial Stock Available
 - Stock Available
- To sort your PO, in the **Recall PO** window, select the PO, and then select the **Stock Check** checkbox before you click **Recall** (F12).

Ace Real-Time RSC Quantity on Hand (QOH)

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 Your Local Hardware 9 Paladin Support 17-Aug-20

Purchase Order Confirm PO Cancel

Days 14 Supplier ACE HARDWARE, 14 EDI Address 1

Part Number	Description
<input type="checkbox"/> RSC OUT OF STOCK	
<input type="checkbox"/> 12345	GAS BBQ
<input type="checkbox"/> 12345	Need: 0, OrdQty: 1.00, Min: Max: 3.00, Ord%: 100%
<input type="checkbox"/> PARTIAL STOCK AVAILABLE	
<input checked="" type="checkbox"/> 160423	RED ADIRONDACK CHAIR
<input checked="" type="checkbox"/> 160423	Need: 0, OrdQty: 1.00, Min: Max: 2.00, Ord%: 100%
<input type="checkbox"/> STOCK AVAILABLE	

Remote Stock Check Item: 160423

Store	Description	SOH	OnOrd	Forecast Needs	Surplus
Ace - C001	RED ADIRONDACK CHAIR	9	0	0	0

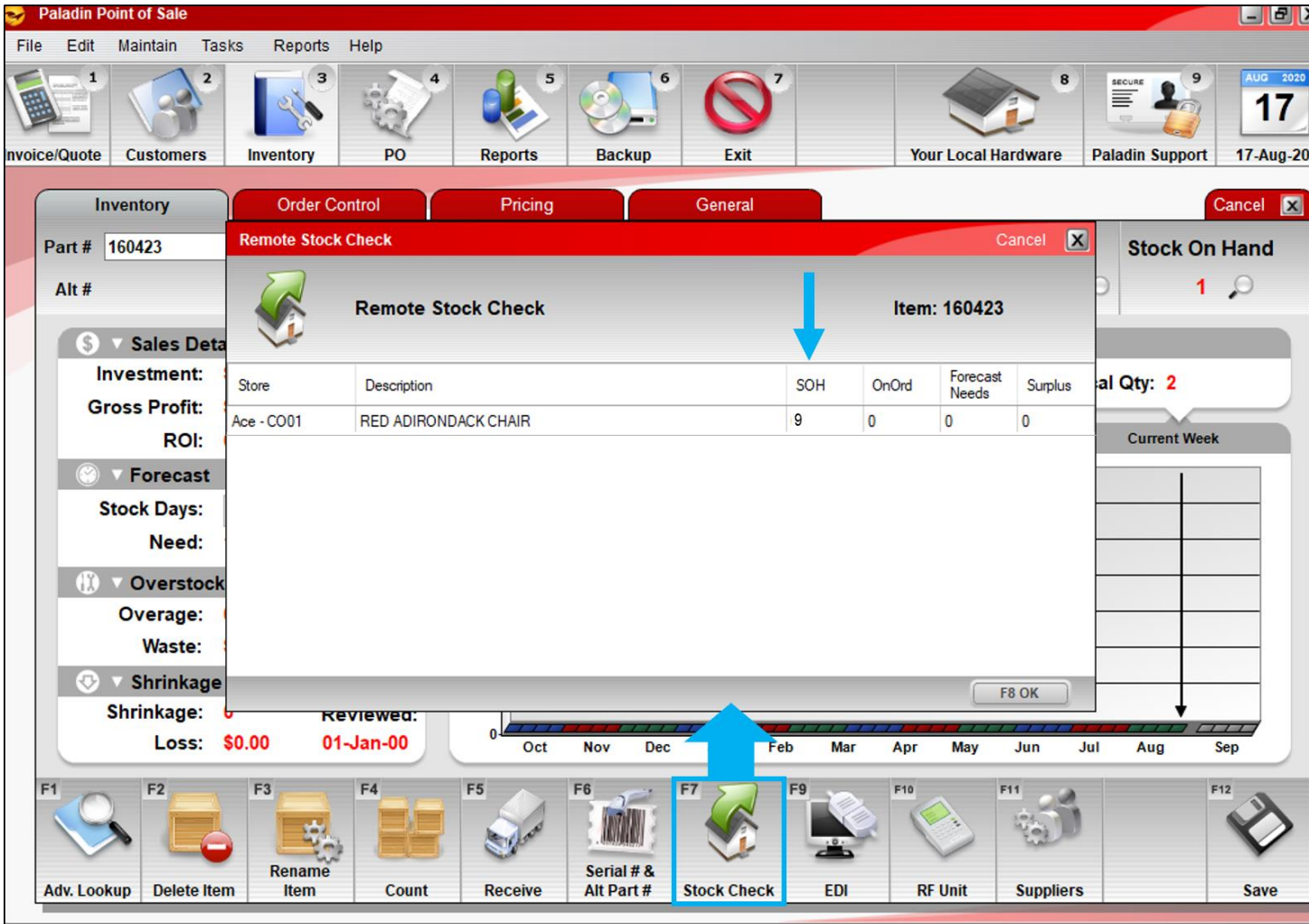
NOTES

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

- Real-time quantity on hand for products in the Ace Retail Support Center (RSC) for purchase order items.
- Select a PO item and click **Stock Check | Transfer** (multi-store) or press F7.

Ace Real-Time RSC Quantity on Hand (QOH)



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 Your Local Hardware 9 Paladin Support 17-Aug-20

Inventory Order Control Pricing General

Part # 160423

Alt #

Remote Stock Check

Item: 160423

Store	Description	SOH	OnOrd	Forecast Needs	Surplus
Ace - CO01	RED ADIRONACK CHAIR	9	0	0	0

Stock On Hand 1

al Qty: 2

Current Week

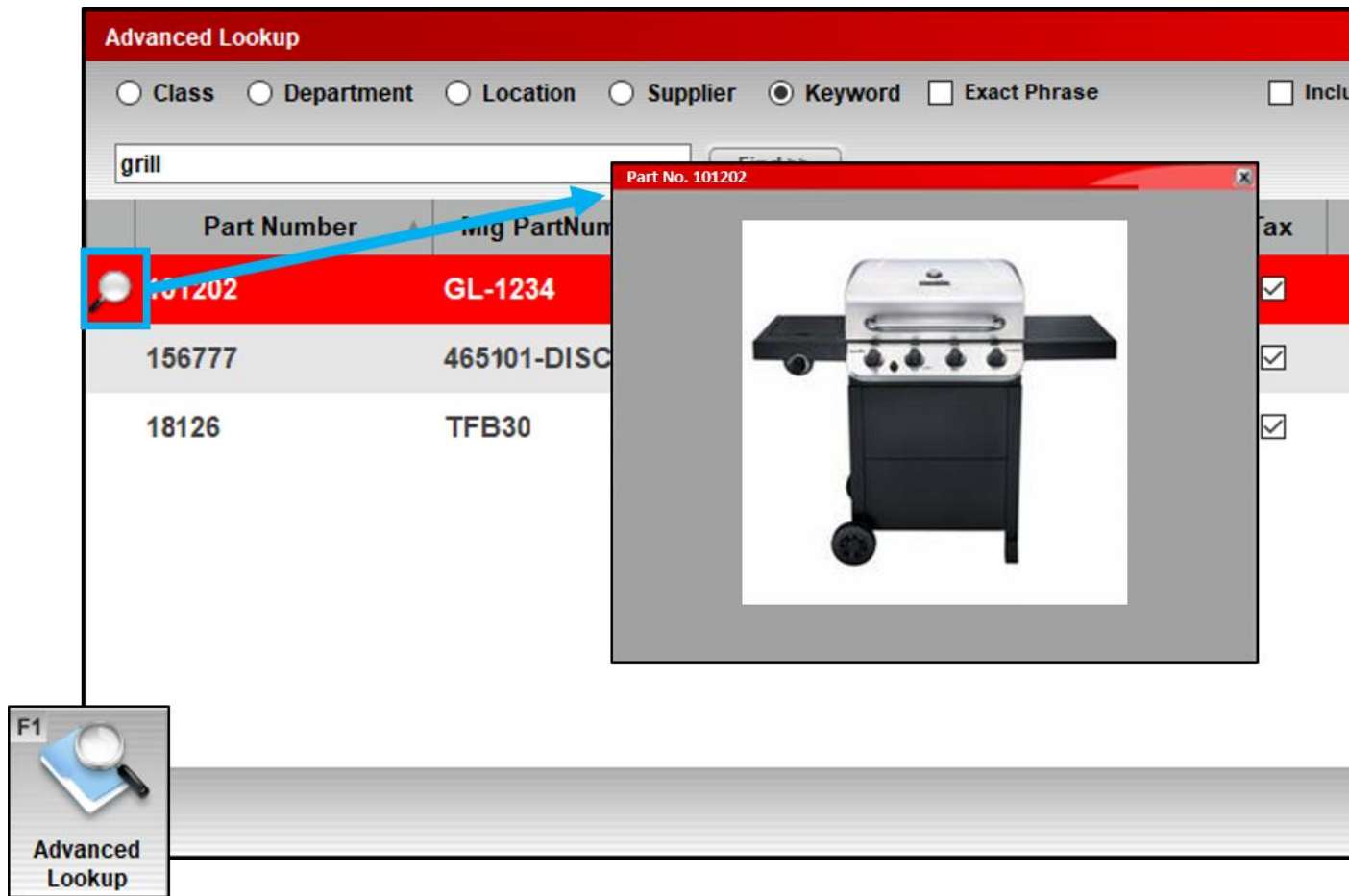
Loss: \$0.00 Reviewed: 01-Jan-00

Oct Nov Dec Feb Mar Apr May Jun Jul Aug Sep

F1 Adv. Lookup F2 Delete Item F3 Rename Item F4 Count F5 Receive F6 Serial # & Alt Part # F7 Stock Check F8 OK F9 EDI F10 RF Unit F11 Suppliers F12 Save

- Real-time RSC quantity on hand is also available in the **Inventory** module.
- Click **Stock Check | Transfer** (multi-store) or press F7.
- To use these RSC real-time QOH features, you must select your preferred RSC in Paladin.
 1. **File > Setup > Supplier** tab.
 2. Select Ace. Then scroll down and click **More...**
 3. In the **Ace RSC Code** list, select your preferred RSC, and save.

Ace 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.

Ace Hotsheets process automatically overnight



- Paladin EDI will automatically process Ace Hotsheets and maintenance updates overnight (4 am local time).
- Price increases are delayed to ensure your bin tag prices aren't lower than the inventory prices.
- Ace EDI invoices are still processed manually.
- A manual step (**EDI [F9] > Download Files**) is still required to process EDI invoices and delayed prices updates.
- Your EDI processing wait time will be short because the bulk of the processing (Hotsheets and maintenance) was already completed overnight.
- This feature is in test in a few stores and will be released to all stores soon.

Revenue Report update for Ace Instant Savings and Dynamic Promotions

TODAY'S COMPARATIVE REVENUE PAGE 1

SELECTION EMPLOYEE 0 999999999 TERMINAL 0 999999999 SHOW PRIOR YEAR COMPARATIVE TOTALS? X DETAIL BY DEPARTMENT? X	THIS PERIOD SEARCH BETWN Monday 08-Jun-20 Monday 08-Jun-20	LAST YEAR SEARCH BETWN Saturday 08-Jun-19 Saturday 08-Jun-19	DATE STAMP RAN ON 08-Jun-20 AT 13:48 EMP# 1
--	--	--	---

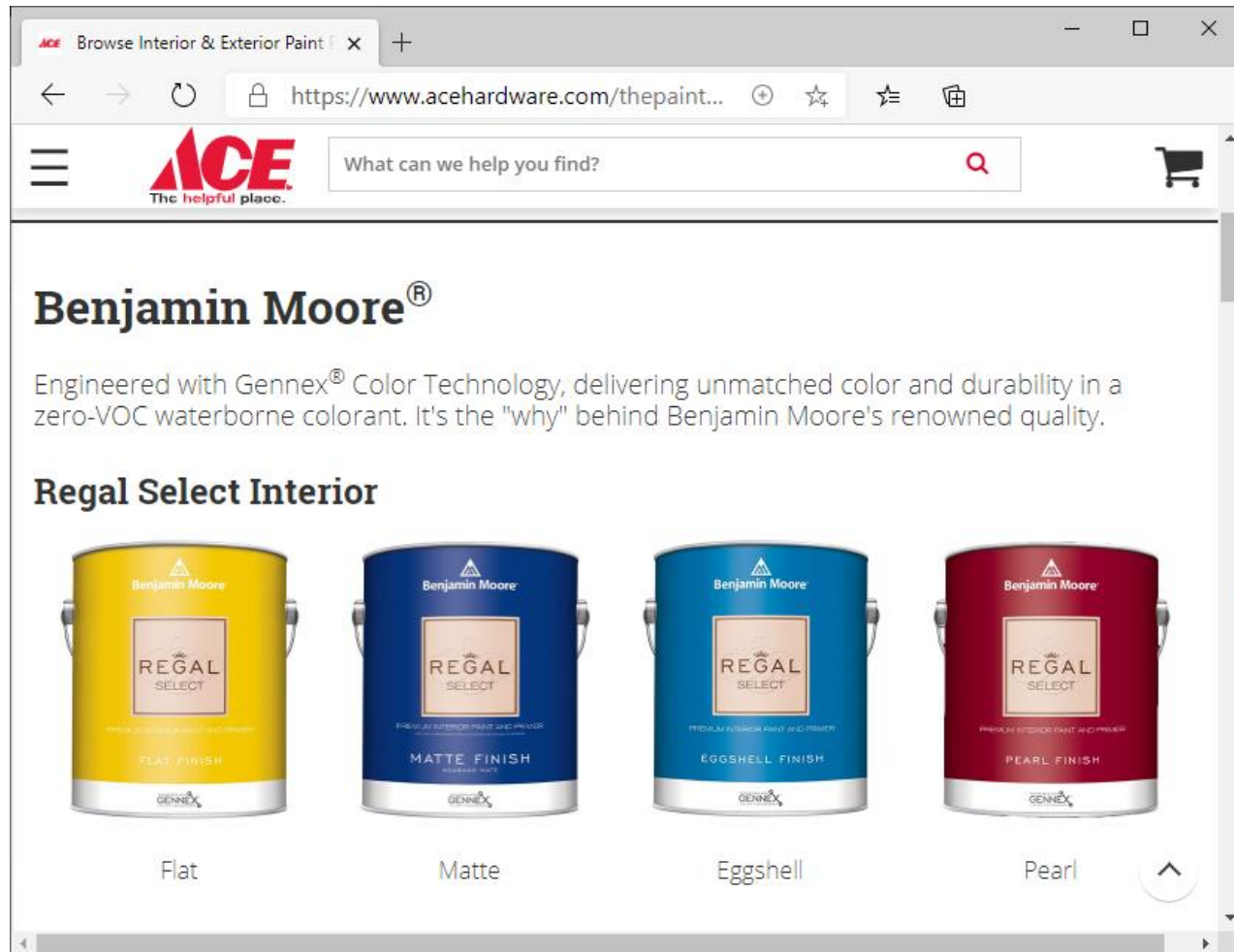
REVENUE SOURCES						CASH SOURCES					
THIS PERIOD			LAST YEAR			THIS PERIOD			LAST YEAR		
SOURCE	REVENUE AMOUNT	% OF SALES	# OF INV	REVENUE AMOUNT	% OF SALES	# OF INV	SOURCE	CASH AMOUNT	% OF CASH	CASH AMOUNT	% OF CASH
CASH				38	25.4%	296	CASH	5.51	100.0%	1681.38	27.5%
CHG CARD	0.00	0.0%	0	64	1.1%	1	CHG CARD	0.00	0.0%	4431.17	72.5%
CHG CARD	0.00	0.0%	0	4431.17	67.0%	206	CHECK	0.00	0.0%	0.00	0.0%
CHECK	0.00	0.0%	0	0.00	0.0%	0	PAID OUT	0.00		0.00	
INST SAV	0.00	0.0%	0	31.00	0.5%	7	CASHDROP	0.00		0.00	
DYN PROM	0.00	0.0%	0	133.42	2.0%	22					
WEBSTORE	0.00	0.0%	0	264.00	4.0%	2					

NET \$	5.51	100%	6616.61	100%	TOTAL	5.51	100%	6112.55	100%
GROSS \$	+5.51	0.00	+6782.88	-166.27	ROA	0.00	DSCNT	0.00	
CUSTOMER COUNT	1		389						

		THIS PERIOD				LAST YEAR				
LINE #	DEPT ID	DEPT NAME	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN
1	10	CLEANING SUPPLIE	1	3.68	5.98	38.5%	18	120.20	200.63	40.1%
2	14	PAIN	0	0.00	0.00	0.0%	67	387.66	737.18	47.4%
3	20	HAND	0	0.00	0.00	0.0%	62	406.75	679.79	40.2%
4	30	FLASHLIGHTS / LI	0	0.00	0.00	0.0%	10	86.11	148.28	41.9%
5	34	ELECTRICAL SUPPL	0	0.00	0.00	0.0%	32	77.49	168.48	54.0%
6	40	PLUMBING SUPPLIE	0	0.00	0.00	0.0%	108	306.31	726.77	57.9%
7	10201	Ace Instant Savings	1	0.00	-5.64	100.0	0	0.00	0.00	0.0%
8	10202	Ace Dynamic Prom	1	0.00	-0.98	100.0	0	0.00	0.00	0.0%

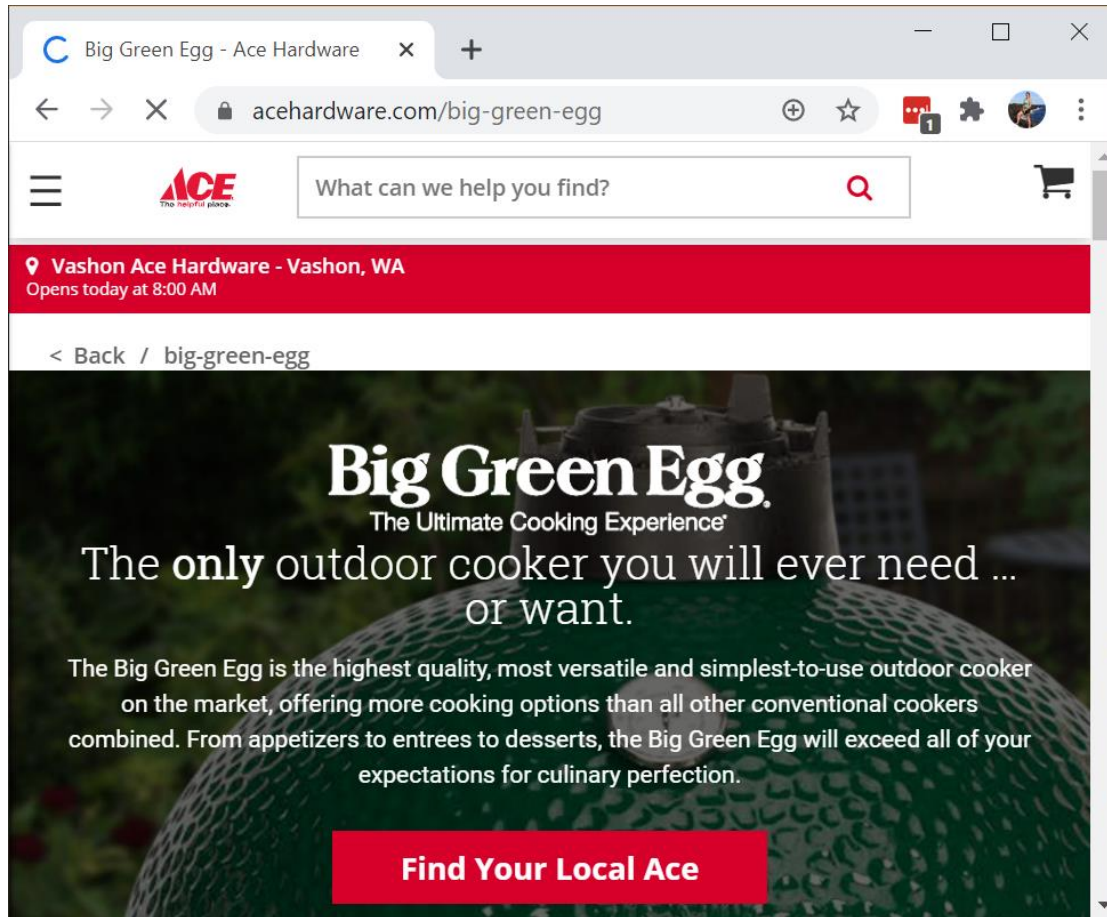
- After June 1, 2020, Ace Instant Savings and Dynamic Promotions will appear under two new department categories:
 - Ace Inst Savings** (Dept ID 10201)
 - Ace Dynamic Prom** (Dept ID 10202)
- No changes to tax or accounting calculations in Paladin.
- Changes were made to prevent revenue totals from appearing greater than taxable totals when promotions are taxed.

Support for Valspar → Benjamin Moore SKU conversion



- Convert Valspar inventory items into Benjamin Moore items automatically.
- New tool makes these changes:
 - Primary part number is set to Benjamin Moore SKU. Valspar SKU moves to the alternate part number list.
 - Benjamin Moore UPC is added and becomes primary (default) alternate part number.
 - Valspar manufacturer number is changed to the Benjamin Moore part number.
- To run the tool, in Paladin, go to **Maintain > Utilities > Ace Utilities > Ace Valspar SKU Conversion**

Support for Big Green Egg online/pick up in store orders



- Big Green Egg items sold on Acehardware.com now require Ace Hardware SKUs.
- To ensure that your customers can purchase Big Green Egg products online from your store, run the BGE SKU conversion too.
- In Paladin, go to **Maintain > Utilities > Ace Utilities > Ace BGE SKU Conversion**

New point of sale features coming soon

Release 2021 - A

Coming Soon – Pick List Report

Recall Transaction Cancel

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

☒ Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
George Johnson	Quote # 1: Remodel	✓		03-Feb-21 16:36	3	25
Jen Jones		✓		03-Feb-21 06:50	3	5

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

- Show outstanding (unsold) items on orders, sorted by order.
- Useful for fulfillment

AutoSave On Pick List... - Saved

File Home Insert Draw Page Layout Formulas Data Review View Help Share

M1

	C	D	E	F	G	H	I	J	K
1	Filename	Memo	Salesperson Id	Account number	Name	Part number	Description 1	Quantity	Price
2	Jen Jones		3	5	JENNIFER JONES	T1212	PAINT BRUSH 3"	10	12.28
3	Jen Jones		3	5	JENNIFER JONES	P1234	PAINT GALLON	16	24.99
4	Jen Jones		3	5	JENNIFER JONES	65324	2x4 OAK	16	9.99
5									
6	George Johnson	Remodel	3	25	GEORGE JOHNSON	F12345	TILE	40	12.28
7	George Johnson	Remodel	3	25	GEORGE JOHNSON	V56789	VANITY	1	549.99
8	George Johnson	Remodel	3	25	GEORGE JOHNSON	F54321	GROUT	2	50.00

Sheet1

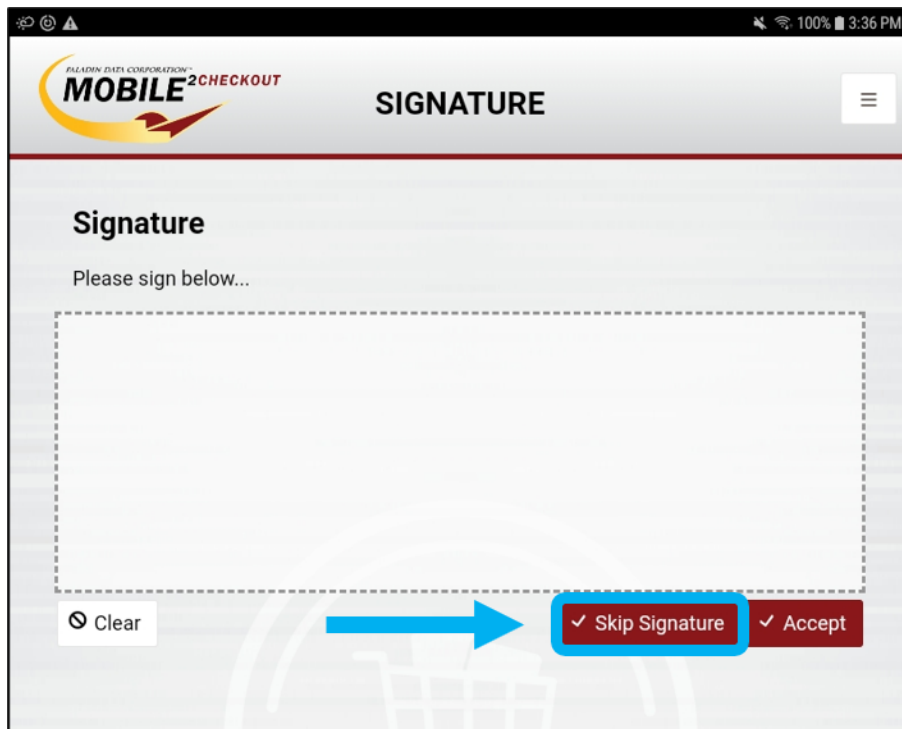
Ready Display Settings 100%

Coming Soon – Declutter your quotes by removing older ones



- A new setting will delete quotes automatically after a time period (days) that you specify.
 - By default, quotes are never deleted.
 - **Important:** Deleted quotes cannot be restored.
- In Paladin, go to **File > Setup > Invoice (Store) tab** and look for this setting:
 - **Delete stored quotes after**
<select a number> days
 - If set to zero (0), quotes are never deleted.
 - Utility runs once a week, so it may take a few days for your old quotes to disappear after you set up this feature.

Coming soon – Skip signature available in Mobile2Checkout app



- You can now process a transaction with a signature in the Mobile2Checkout app.
- Tap **Skip Signature** to complete the transaction without a signature.
- **Skip Signature** button will only appear if the transaction meets the criteria set in Paladin.
 - **File > Setup > Credit Card tab > Signatures** pane
- Requires Mobile2Checkout version 1.1.5
- If needed, contact Paladin Support to upgrade your app.

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

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



Next Webinar:

Post Your Products Online with Paladin, Pointy

March 30 @ 9am PT

Register: portal.paladinpos.com/webinars



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