



Tips & Tricks: Cascading Sales can Brighten Your Holidays

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WHAT YOU'LL LEARN

- What is a cascading sale?
- How do sales work in Paladin?
- Using cascading sales for close-outs during the holidays.
- How to:
 - Create a sales list.
 - Import items into the sale list.
 - Create a pricing plan.
 - Set up cascading pricing plans.
 - Print a sales report and export data for signs.
 - Print sale signs

What is a cascading sale?



- A cascading sale offers progressive discounts on close-out items.
- Example:
 - Items start out at a 20% discount.
 - After two weeks, discount increases to 30%.
 - After two more weeks, discount increases to 50%.

How do sales work in Paladin?

- Sale items can be contained in a “Sale List” and subject to rules set forth in the “Pricing Plan”
~ or ~
- A “Pricing Plan” can be used without the need for a “Sale List” and include dept’s, classes, supplier, etc.

Pricing Plan

Respect min margin

Sale List Range Start **Set ID 75**

Sale List Range End

Dept Number Range Start

Dept Number Range End

Class Number Range Start

Class Number Range End

Subclass Number Range Start

Subclass Number Range End

Supplier Number Range Start

Supplier Number Range End

Date Range

Date Range Start

Date Range End

Discount or Markup

Cost or Retail Price

Amt %

Date Range

Save

Sale List

Sales

Active Inactive

ID	Name	Source	Type
75	Sale Items		Normal

Set fixed sale price for each item

New Remove Edit

Sale Items

Active Inactive

Part Number	Price	Description	SOH	On Order
00053	1.29	COBRA APPLIANCE BRUSH	9	0
001103	2.99	PRITCHARD LAMB NIPPLE 50	3	0
001104	0.99	CALF NIPPLE 200	100	0
001317	3.99	SB1 SALT BLOCK HOLDER	4	0
001556	2.49	ASSORTED CHILDRENS GLO...	15	0
001681	4.99	00096, 15.5GAL HD STEEL S...	1	0

New Remove Edit

or

- ### Range Settings
- Dept
 - Class
 - Subclass
 - Supplier
 - Date Range
 - Discount or Markup

Pricing Plan Only

Respect min margin

Sale List Range Start ~~XXXXXXXXXX~~

Sale List Range End ~~XXXXXXXXXX~~

Dept Number Range Start

Dept Number Range End

Class Number Range Start

Class Number Range End

Subclass Number Range Start

Subclass Number Range End

Supplier Number Range Start

Supplier Number Range End

Date Range

Date Range Start

Date Range End

Discount or Markup

Cost or Retail Price

Amt %

Save

Set percentage discount or markup here

Using cascading sales for close-outs during the holidays

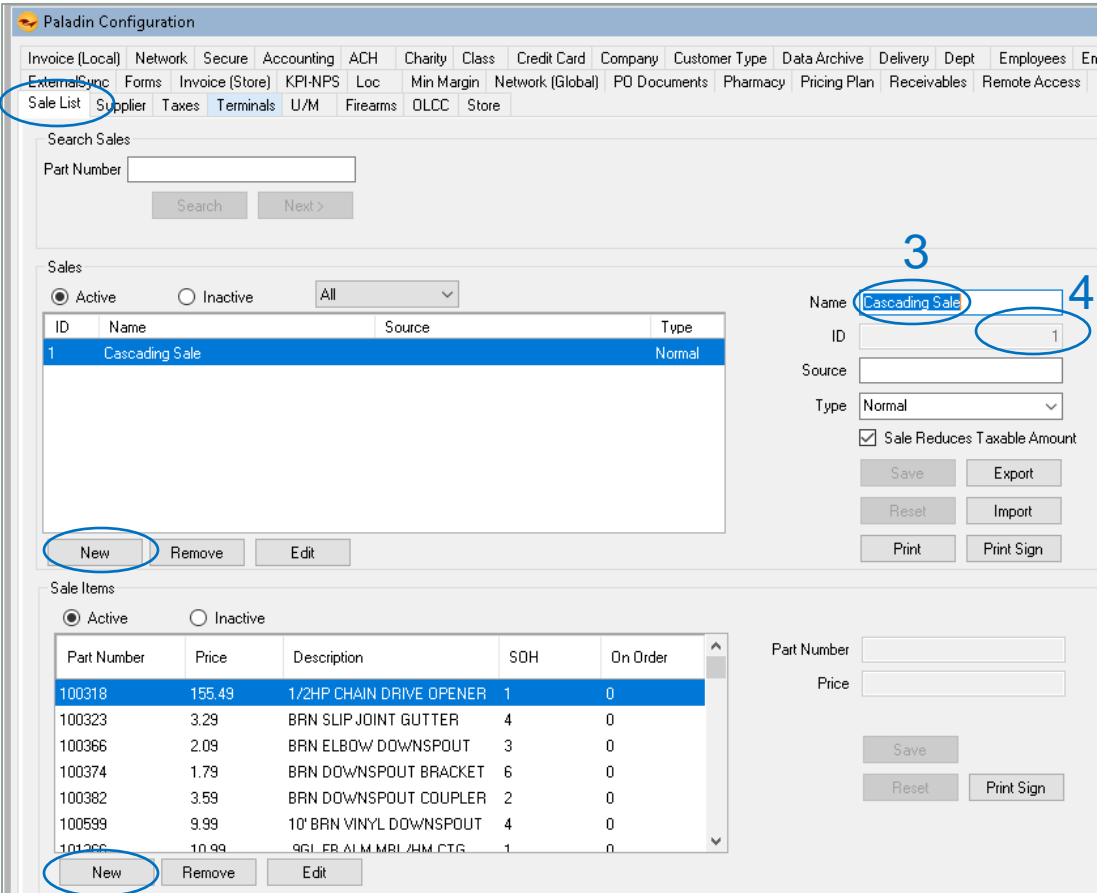


- Cascading sales are a great way to make sure the inventory purchased for the holidays are sold by the end of the calendar year.
- They can be added (preprogrammed) into your Paladin system in advance of the season.
- Sale signs can be generated in Paladin and used to promote the discounted products.

How to create a sale list

On the File menu, click **Setup**.

1



2

3

4

5

Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees En
External Sync Forms Invoice (Store) KPI-NPS Loc Min Margin Network (Global) PO Documents Pharmacy Pricing Plan Receivables Remote Access
Sale List Supplier Taxes Terminals U/M Firearms DLCC Store

Search Sales

Part Number

Search Next >

Sales

Active Inactive All

ID	Name	Source	Type
1	Cascading Sale		Normal

ID

Source

Type Normal

Sale Reduces Taxable Amount

Save Export

Reset Import

Print Print Sign

Sale Items

Active Inactive

Part Number	Price	Description	SOH	On Order
100318	155.49	1/2HP CHAIN DRIVE OPENER	1	0
100323	3.29	BRN SLIP JOINT GUTTER	4	0
100366	2.09	BRN ELBOW DOWNSPOUT	3	0
100374	1.79	BRN DOWNSPOUT BRACKET	6	0
100382	3.59	BRN DOWNSPOUT COUPLER	2	0
100599	9.99	10' BRN VINYL DOWNSPOUT	4	0
101266	10.99	96L BR ALUM MRL/JHM CTG	1	0

Part Number

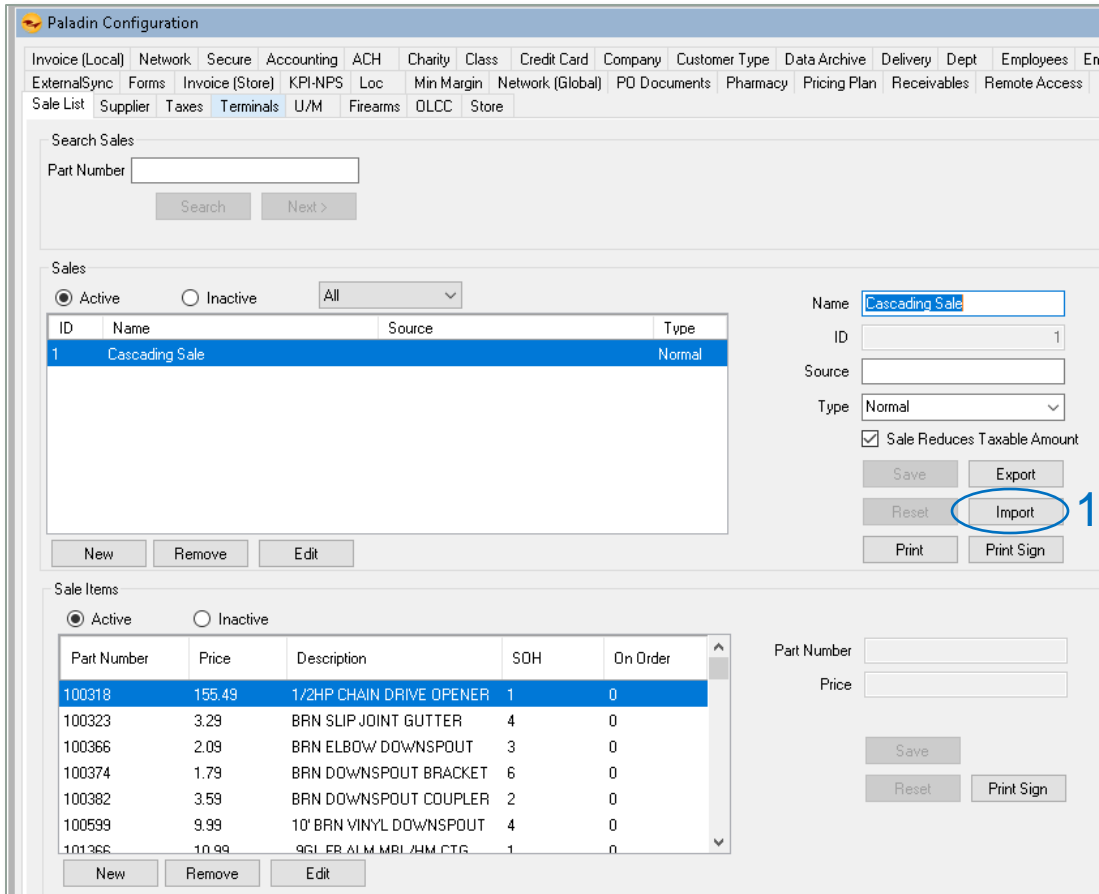
Price

Save

Reset Print Sign

1. In the **Paladin Configuration** window, click the **Sale List** tab.
2. In the **Sales** section, click **New**.
3. In the **Name** box, enter a name for the sale.
4. In the **ID** box, enter a unique ID number and save it for future reference.
5. To add sale items, click **New** under the **Sale Items** pane below.

How to import items into a sale list



Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees En
ExternalSync Forms Invoice (Store) KPI-NPS Loc Min Margin Network (Global) PO Documents Pharmacy Pricing Plan Receivables Remote Access
Sale List Supplier Taxes Terminals U/M Firearms OLCC Store

Search Sales
Part Number
Search Next >

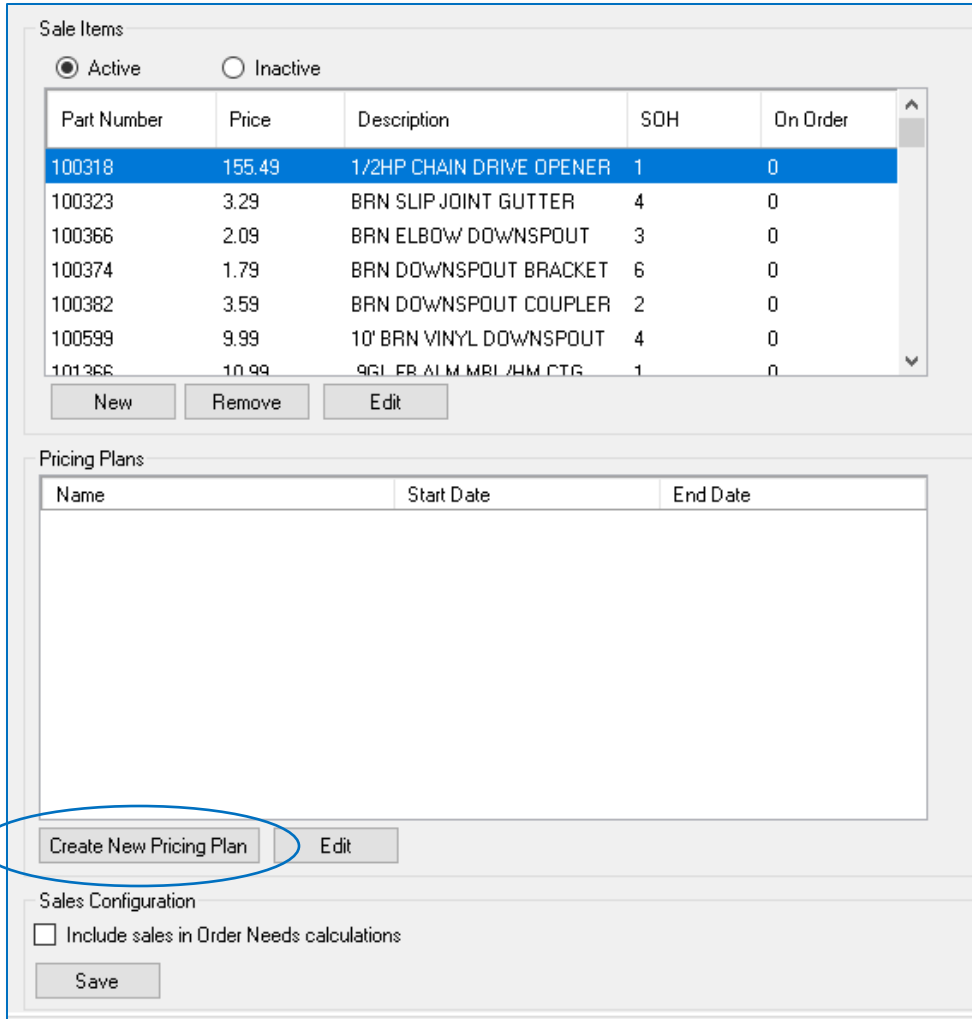
Sales
 Active Inactive All
Name Cascading Sale
ID 1
Source
Type Normal
 Sale Reduces Taxable Amount
Save Export
Reset **Import** 1
Print Print Sign

Sale Items
 Active Inactive
Part Number Price Description SOH On Order
100318 155.49 1/2HP CHAIN DRIVE OPENER 1 0
100323 3.29 BRN SLIP JOINT GUTTER 4 0
100366 2.09 BRN ELBOW DOWNSPOUT 3 0
100374 1.79 BRN DOWNSPOUT BRACKET 6 0
100382 3.59 BRN DOWNSPOUT COUPLER 2 0
100599 9.99 10' BRN VINYL DOWNSPOUT 4 0
101366 10.99 9GLER ALM MRL JHM CTG 1 0
New Remove Edit

Optional method for creating a sale list:

1. In the **Sale List** box, click on **Import** and select the file containing the sale items.
 - To create a sale list, use Excel or Notepad.
 - Create 2 columns with a header for each column like; "PartNumber" and "SalePrice."
 - Save as a file (.txt)
 - This is a fast and easy method for creating and importing a sale list.

How to create a pricing plan



Sale Items

Active Inactive

Part Number	Price	Description	SOH	On Order
100318	155.49	1/2HP CHAIN DRIVE OPENER	1	0
100323	3.29	BRN SLIP JOINT GUTTER	4	0
100366	2.09	BRN ELBOW DOWNSPOUT	3	0
100374	1.79	BRN DOWNSPOUT BRACKET	6	0
100382	3.59	BRN DOWNSPOUT COUPLER	2	0
100599	9.99	10' BRN VINYL DOWNSPOUT	4	0
101366	10.99	9GL FR ALM MBL/HM CTG	1	0

New Remove Edit

Pricing Plans

Name	Start Date	End Date
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Create New Pricing Plan Edit

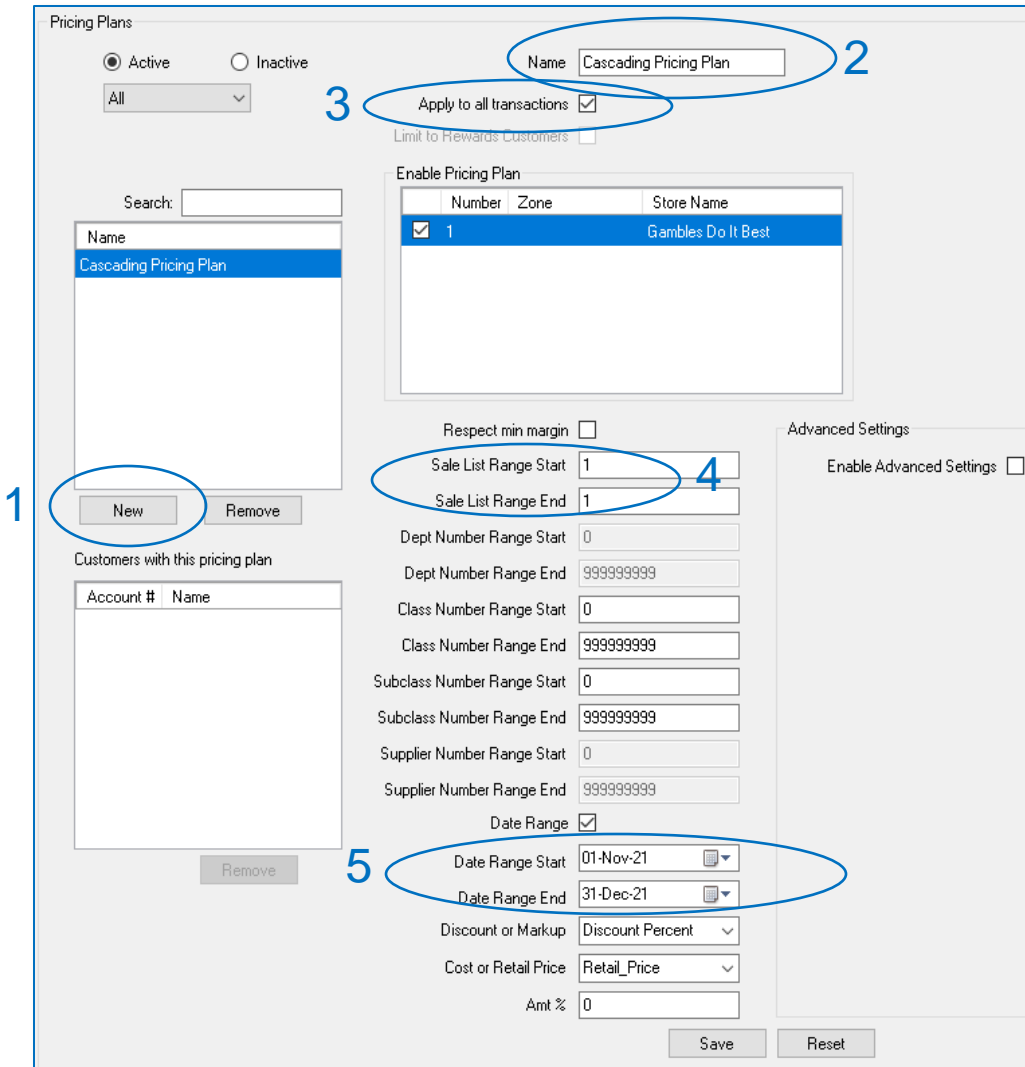
Sales Configuration

Include sales in Order Needs calculations

Save

1. To create a pricing plan and activate the sale you just created, from the **Sale List**, scroll to the **Pricing Plans** pane at the bottom and click **Create New Pricing Plan**.
2. You will be taken to the **Pricing Plan** tab.
3. Otherwise, from the **Paladin Configuration** window, click the **Pricing Plan** tab.

How to create a pricing plan



The screenshot shows the 'Pricing Plans' configuration page. It includes a 'New' button (1), a 'Name' input field (2) containing 'Cascading Pricing Plan', a checked 'Apply to all transactions' checkbox (3), a 'Sale List Range Start' input field (4) containing '1', and a 'Date Range Start' input field (5) containing '01-Nov-21'. Other fields include 'Limit to Rewards Customers', 'Respect min margin', 'Advanced Settings', and various range start/end fields for Dept, Class, Subclass, and Supplier. A table 'Customers with this pricing plan' is also visible.

1. In the **Pricing Plans** section, click **New**.

2. In the **Name** box, enter a name for the pricing plan.

Note: The name can be a maximum of 30 characters.

2. Check box **Apply to all transactions**.

3. When pressing the **Create** new pricing plan from the **Sale List**, the Sale List Range Starting and Ending ID will be added automatically. Otherwise enter a sale list starting and ending **ID**, matching the sale list ID.

4. Optionally, you can set a date range.

How to setup cascading pricing plans



To have an effective close-out sale, you can set up a series of **pricing plans** referencing a series of **sale lists**.

Examples:

Pricing plan No. 1

Sale list No. 1 with 20% discount

Start date December 1st – 10th.

Pricing plan No. 2

Sale list No. 2 with 30% discount

Start date December 11th – 17th.

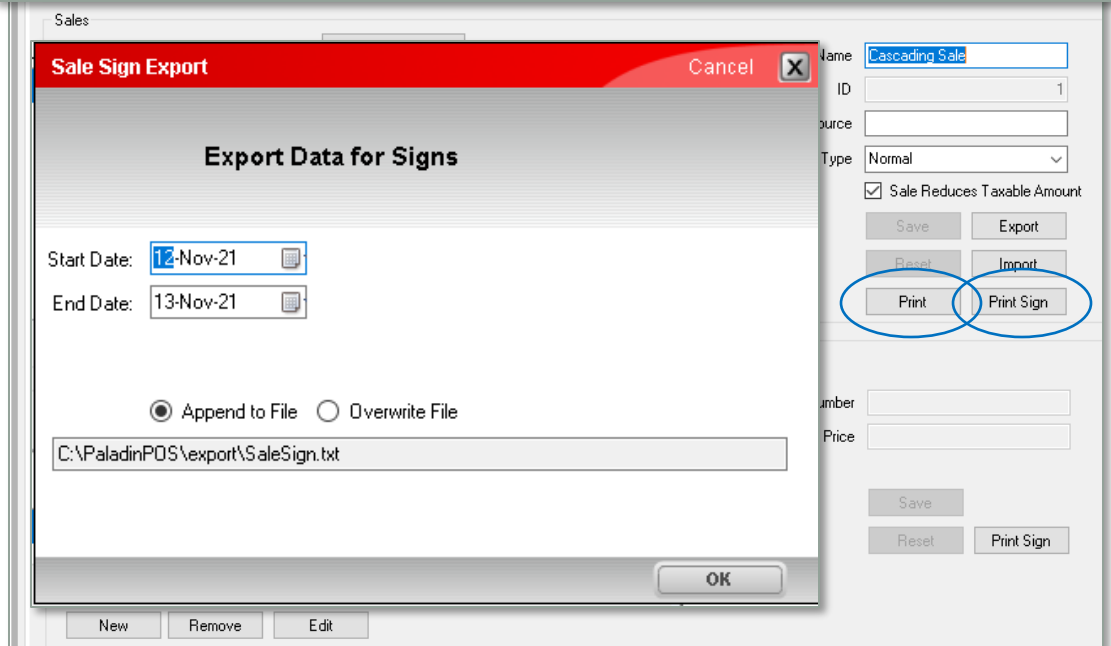
Pricing plan No. 3

Sale list No. 3 with 50% discount

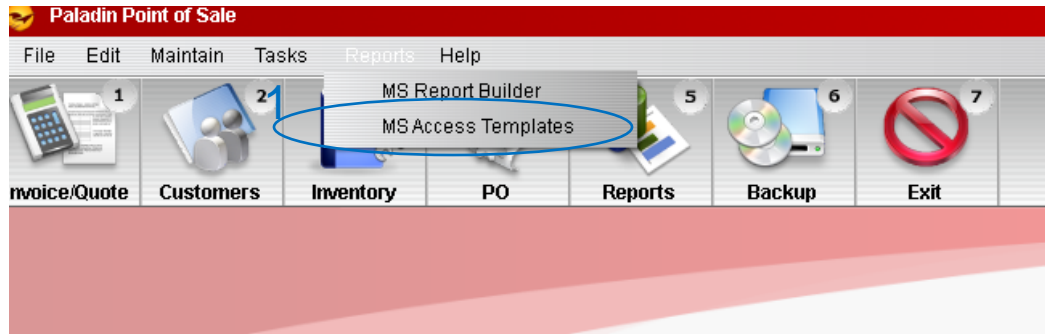
Start date December 18th – 31st.

How to print a sales report and export data for signs

Line Num	Part Number	Description	SOH	Retail Price	Sale Price
1	100318	1/2HP CHAIN DRIVE OPENER	1.00	\$179.99	\$155.49
2	100323	BRN SLIP JOINT GUTTER	4.00	\$6.49	\$3.29
3	100366	BRN ELBOW DOWNSPOUT	3.00	\$4.29	\$2.09
4	100374	BRN DOWNSPOUT BRACKET	6.00	\$3.49	\$1.79



1. On the **File** menu, click **Setup**.
2. In **Paladin Configuration**, click the **Sale List** tab, then select a print option:
3. To print a report listing all sale items: Click **Print** in the **Sales** pane.
4. For a sale sign for a selected sale including all items, in the **Sales** pane click **Print Sign**.
5. To print a sale sign for the selected item: In the **Sale Items** pane, click **Print Sign**.
6. Enter date range of the sale.
7. Click **OK**



<p>Black Friday CAT 5/6 CONNCT WALLPLATE 564005</p> <p>\$4.09</p> <p>Start Date: 11/12/2021 End Date: 11/13/2021 \$6.49</p>	<p>Black Friday PORTABLE BLACK SPEAKER 556654</p> <p>\$11.99</p> <p>Start Date: 11/12/2021 End Date: 11/13/2021 \$22.99</p>
<p>Black Friday TLS BLTOOTH GRAY SPEAKER 556433</p> <p>\$22.99</p> <p>Start Date: 11/12/2021 End Date: 11/13/2021 \$44.99</p>	<p>Black Friday 2.6" STL CLIP FOLD KNIFE 820801</p> <p>\$10.99</p> <p>Start Date: 11/12/2021 End Date: 11/13/2021 \$21.99</p>

How to print sale signs

1. Click **Reports** on the menu bar in Paladin.
2. Select **MS Access Templates**.
3. Select **Sales Signs**.
4. Select desired sale sign size and type.
Note: See the LTSR Catalog in Paladin knowledgebase to view all sign types.
5. Click **Print**
6. Click **Close**

Options for setting up a pricing plan without a sale list

Sale numbers	In the Sale Number Date Range Start and End boxes, enter the range of sales to which the pricing plan applies.
Department numbers	In the Dept Number Range Start and End boxes, enter the supplier number range.
Supplier numbers	In the Supplier Number Range Start and End boxes enter the supplier number range.
Class numbers	In the Class Number Range Start and End boxes, enter the class.
Date range	In the Date Range Start and End lists, select the date.
Basic percentage discount	<ul style="list-style-type: none">• In the Discount or Markup list, select Discount Percent.• In the Cost or Retail Price list, select the type of cost or price.• In the Amt% box, enter the percentage amount.

Next webinar:

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December 7, 2021

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