UNIVERSITY

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?

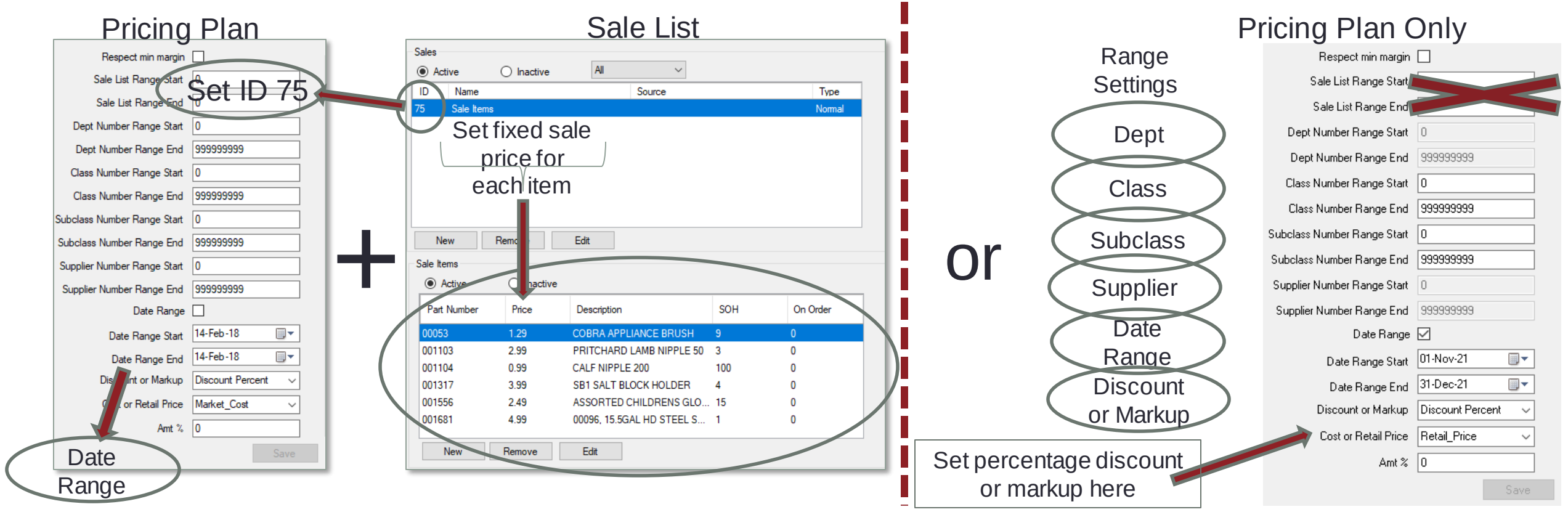
- A cascading sale offers progressive discounts on close-out items.
- Example:
  - Items start out at a 20% discount.
  - After two weeks, discount increases to 30%.
  - After two more weeks, discount increases to 50%.

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 ~

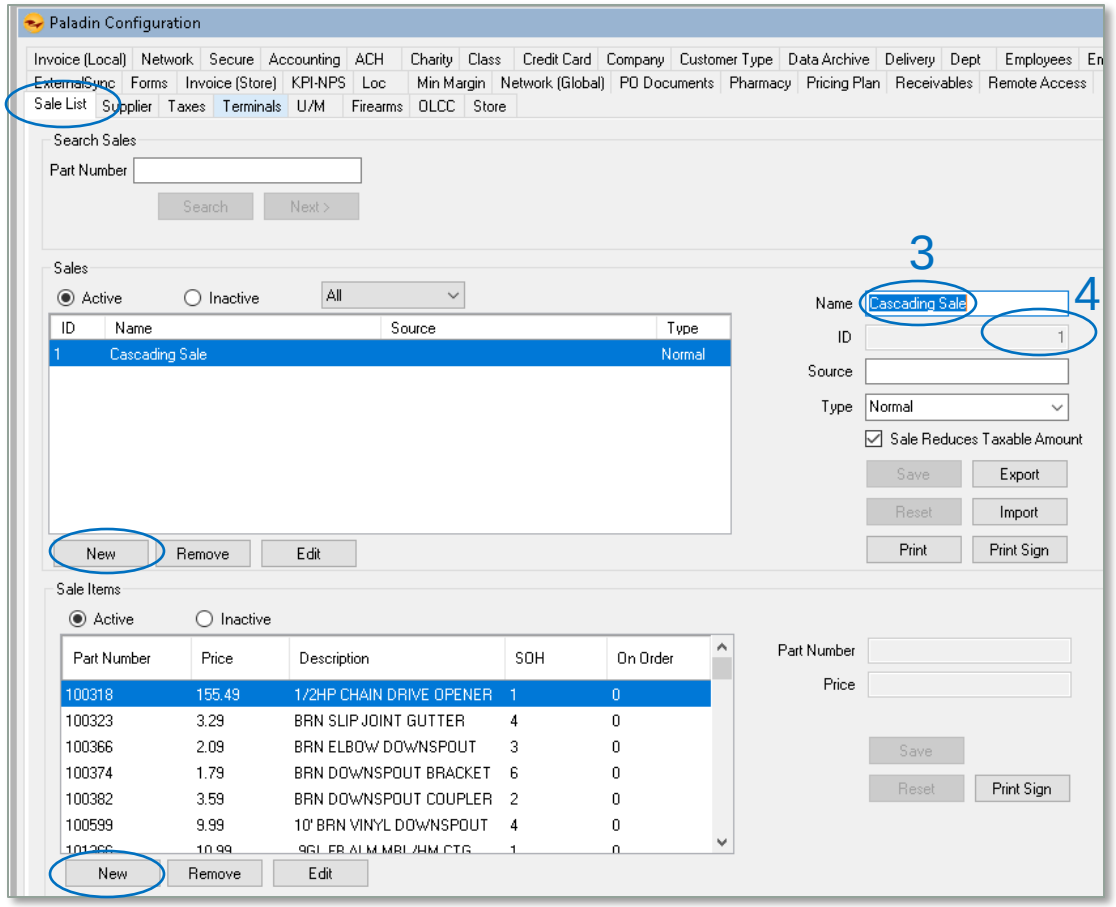
- A “Pricing Plan” can be used without the need for a “Sale List” and include dept’s, classes, supplier, etc.



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.

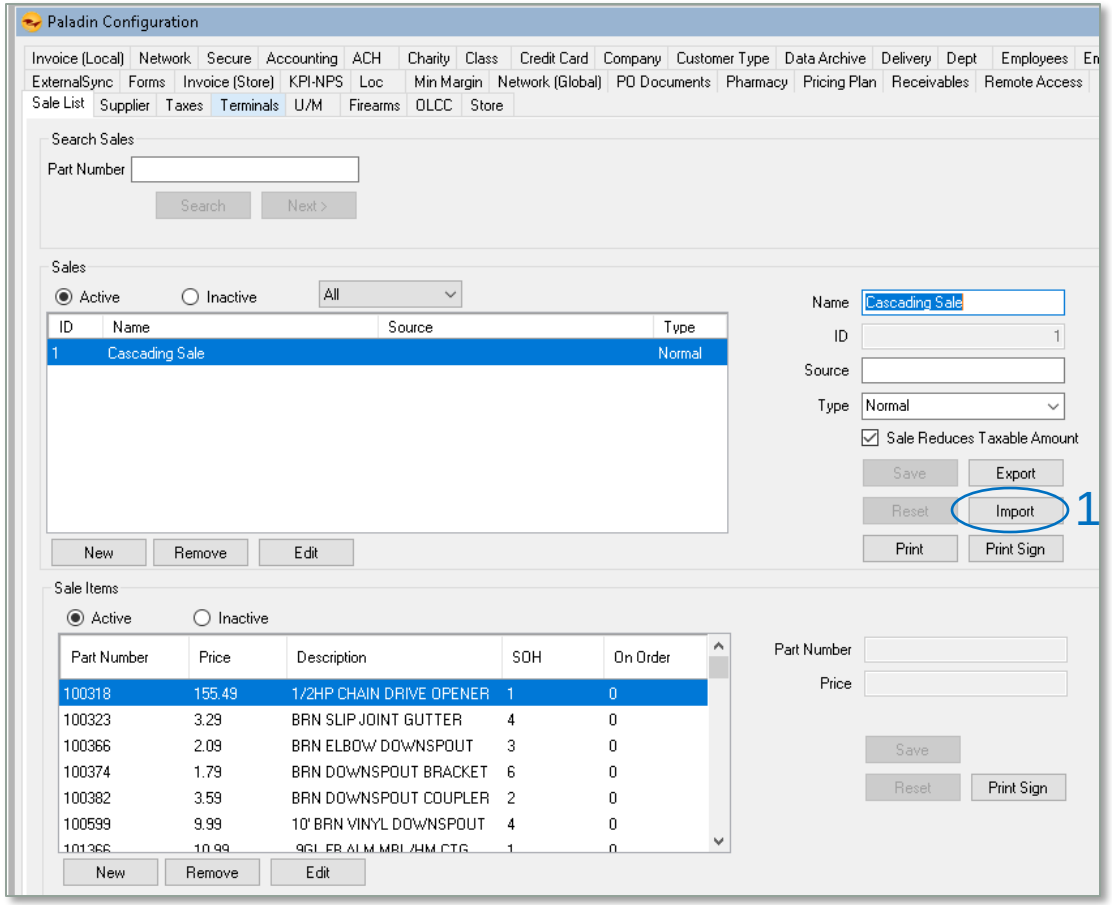
How to create a sale list



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

1. 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

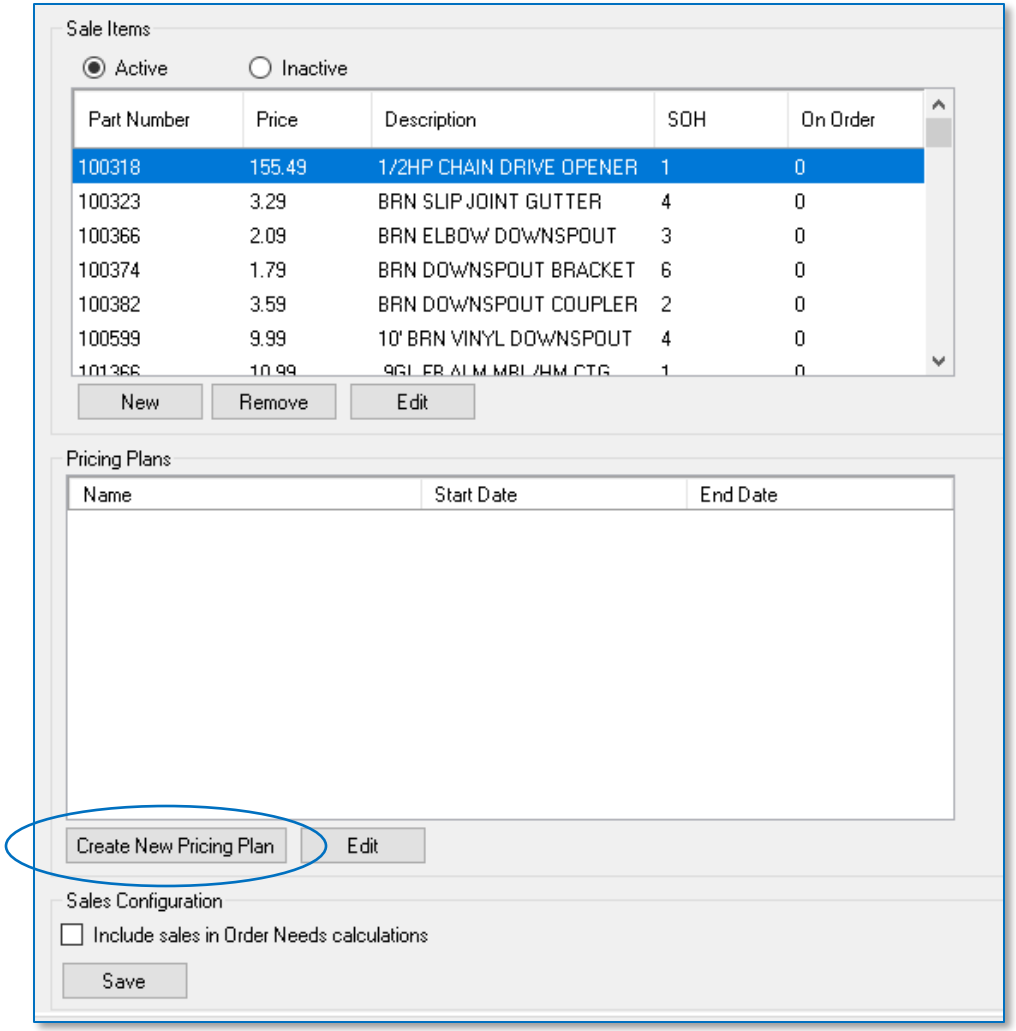


Optional method for creating a sale list:

1. In the **Sale List** box, click on **Import** and select the file containing the sale items.

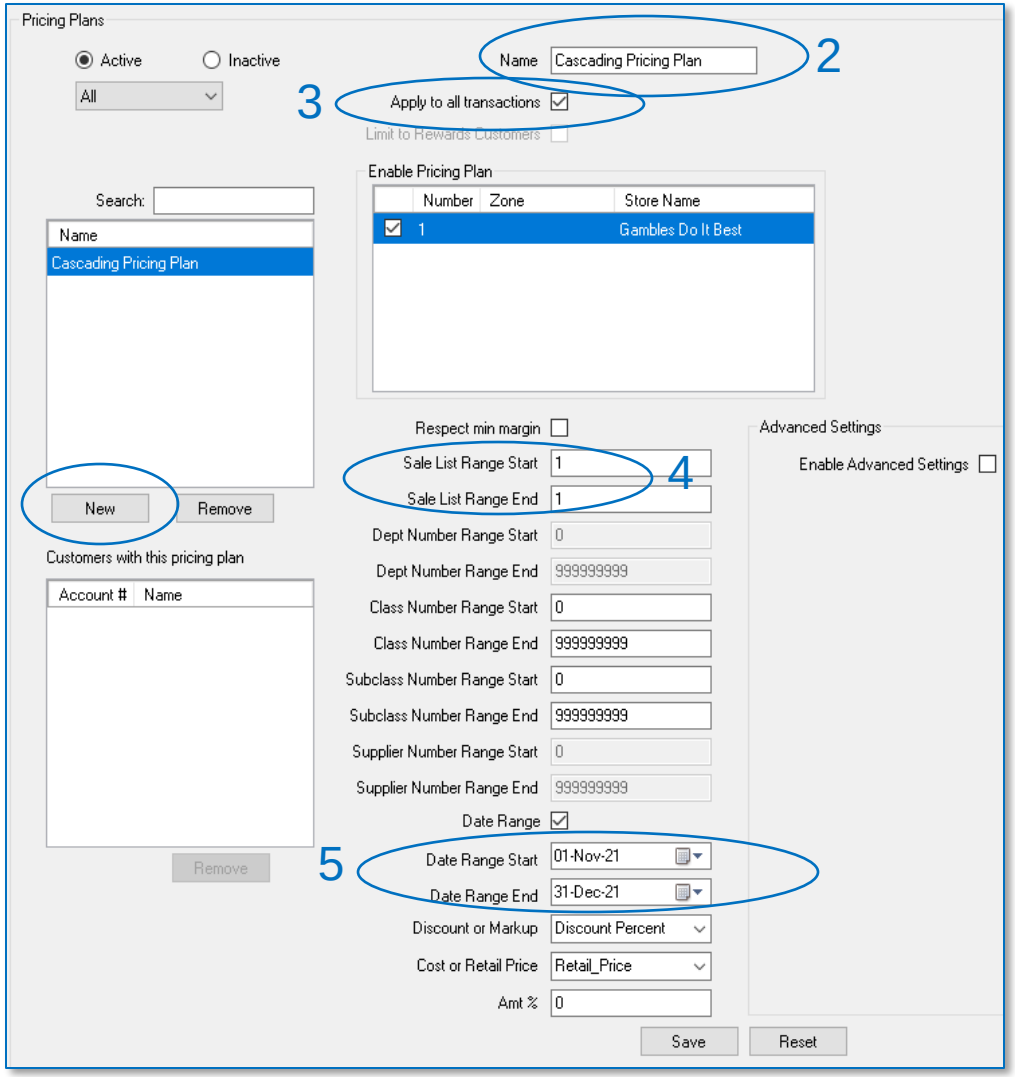
- To create a sale list, use Excel or Notepad.
- Create 2 columns with a header for each column like; “PartNumber” and “SalePrice."
- Save as a file (.txt)
- This is a fast and easy method for creating and importing a sale list.

How to create a pricing plan



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



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

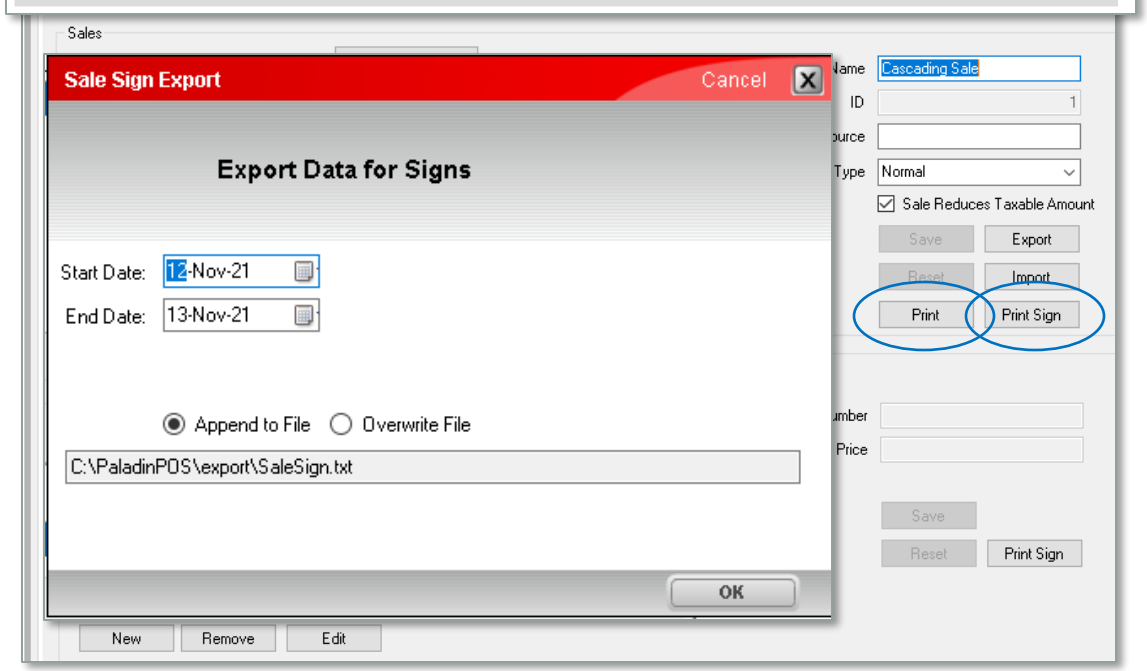
To have an effective close-out sale, you can set up a series of **pricing plans** referencing a series of **sale lists**.

Examples:

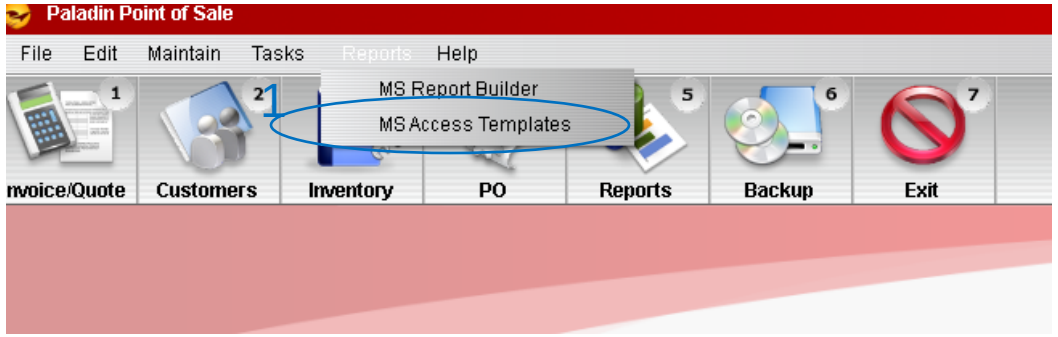
Pricing plan No. 1 Sale list No. 1 with 20% discount Start date December 1st – 10th.
Pricing plan No. 2 Sale list No. 2 with 30% discount Start date December 11th – 17th.
Pricing plan No. 3 Sale list No. 3 with 50% discount Start date December 18th – 31st.

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**



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	• 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.

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