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Fall Virtual User Meeting

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WHAT YOU'LL LEARN

- Our 2021 releases include:
  - Pick List
  - Auto-delete quotes
  - Mobile2 Skip Signature
  - Transaction Report with Rewards IDs
  - Charge Customer Email Utility
  - Returns – Charge Only
  - Collect on Delivery option
  - Send purchase orders to any email address
  - Show location-specific QR codes on receipts
  - Advanced Lookup for customer ACH data
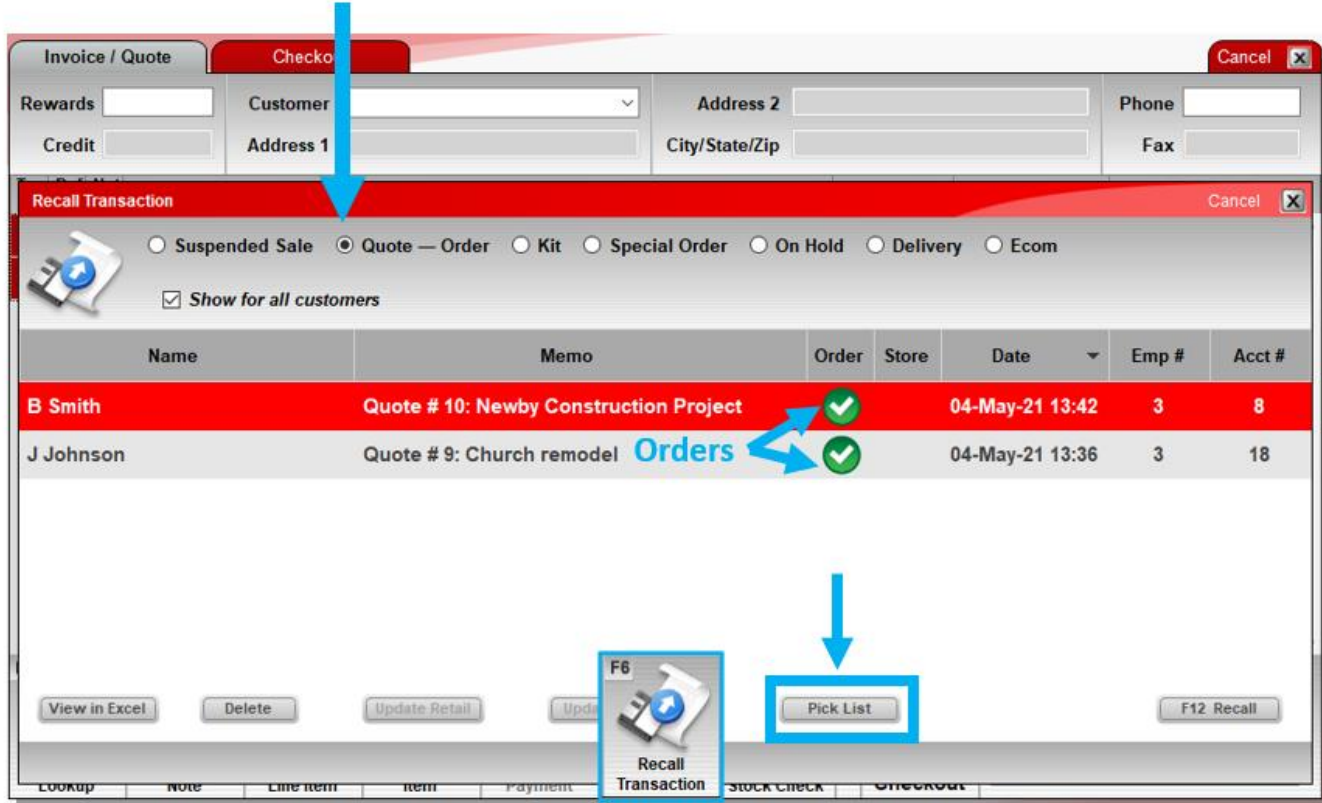
WHAT YOU'LL LEARN

- New GL categories for Rich Rewards coupons
- Adding incremental part numbers when adding inventory
- Simplified tax holiday sales and accounting
- Insufficient stock on hand alert
- Benjamin Moore programs reports
- New bin and item tags
- Advanced Lookup Description 3
- Export sales into Excel
- Accounting integration updates
- Capital One Trade Credit rebranding

2021 New Features

Pick List Report

A Pick List Excel spreadsheet makes it easy for your fulfillment department to complete orders.

1. Open the **Invoice/Quote** module.

2. Select a customer (optional).

3. Click **Recall Transaction** and select **Quote – Order.**

4. To show all orders, select **Show for all customers.**

5. Click **Pick List** to create the spreadsheet.
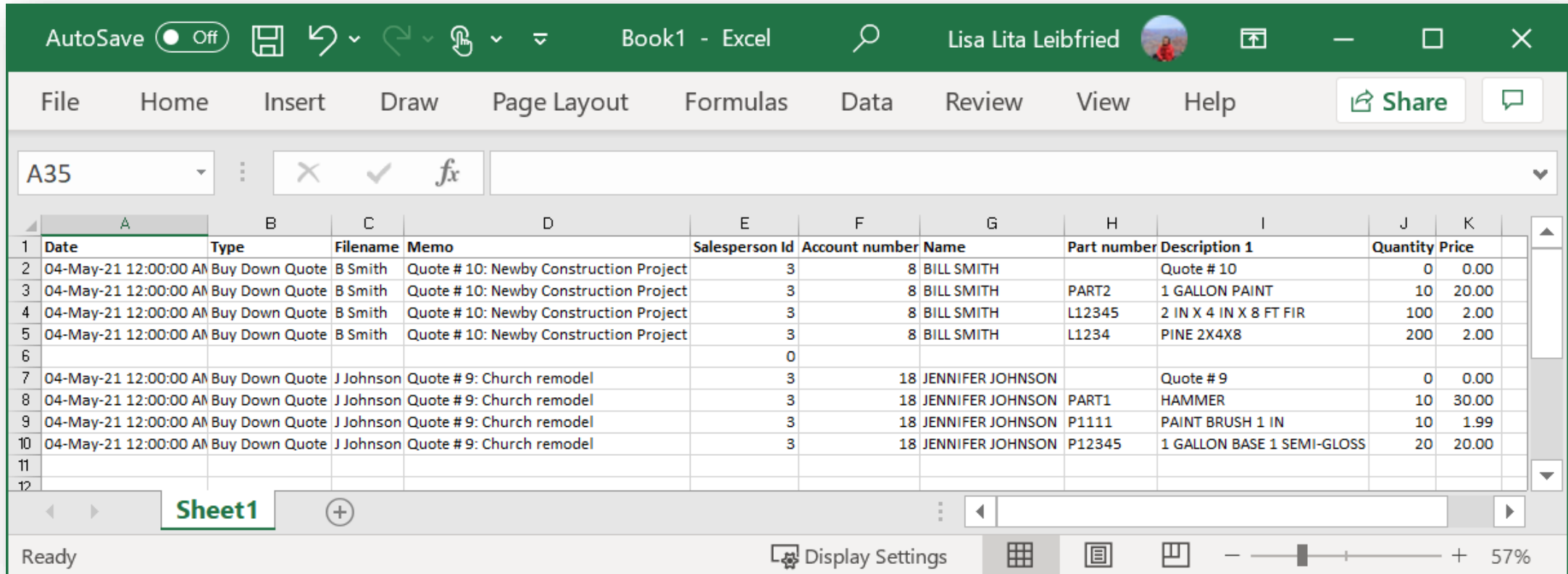
Pick List

Pick List spreadsheet sorts unfulfilled items by order and includes order details such as customer, project, item quantity and price.

Declutter your quotes by removing older ones

Old Quotes

- Remove 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** *<specify a number>* **days**
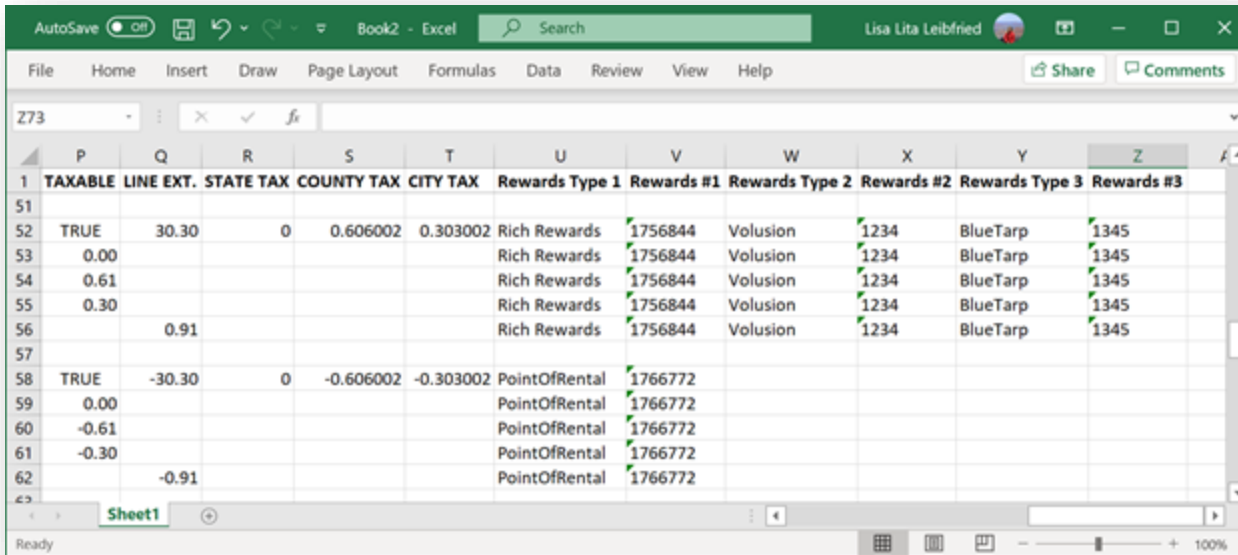 - If set to zero (0), quotes are never deleted.

Skip signatures on Mobile2Checkout app
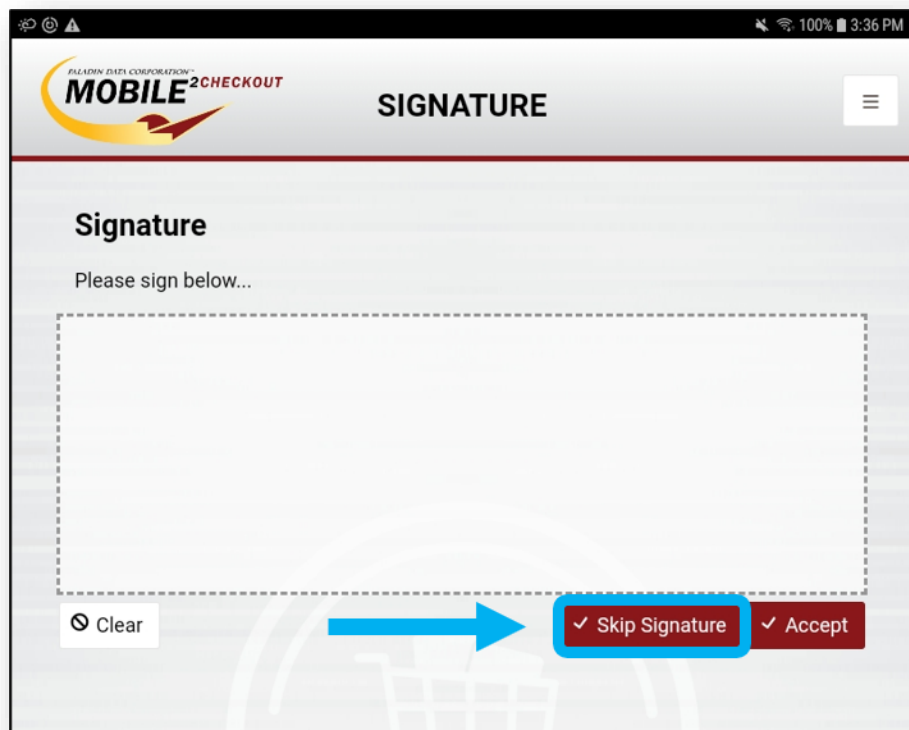
Process a transaction without a signature in the Mobile2Checkout app.

- 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.
- Go to **File** > **Setup** > **Credit Card** tab > **Signatures** pane and set up signature requirements.
- Requires Mobile2Checkout version 1.1.5 or later
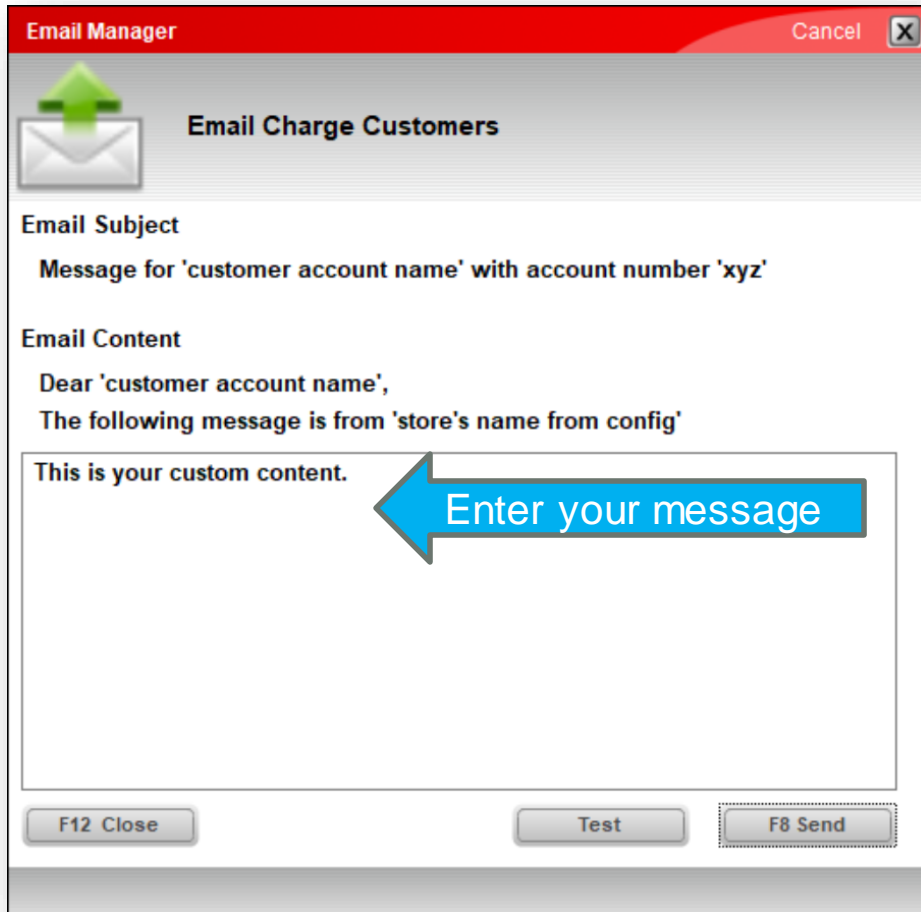- Contact Paladin Support to upgrade your app.

Transaction Report includes Rewards IDs

- The Excel version of the **Transaction Report** has added columns for customer alternate IDs, such as rewards numbers.

- Up to three alternate IDs are shown for each transaction.
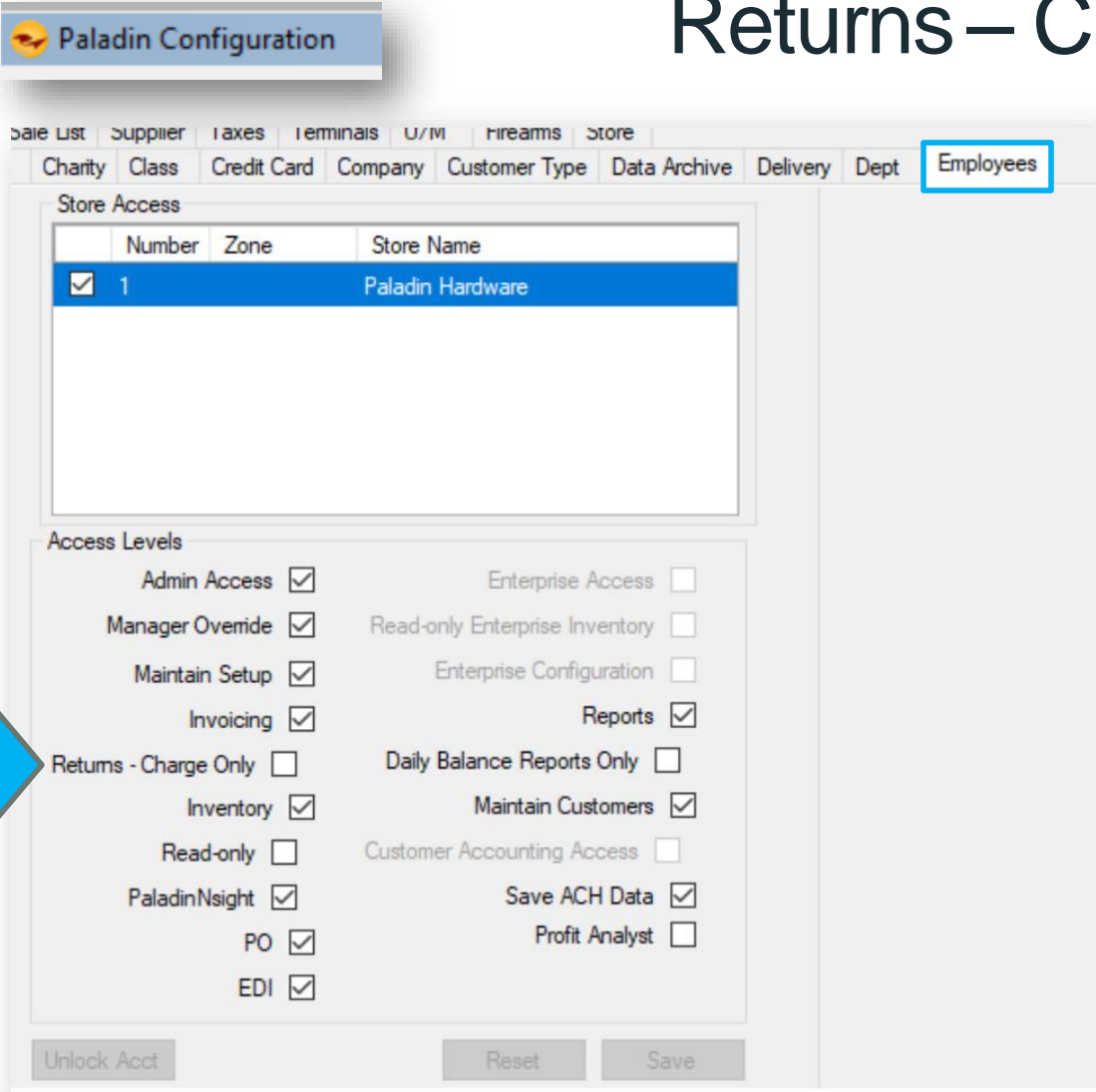
Charge Customer Email Utility

Email Manager — Cancel ⊠

Email Charge Customers

Email Subject

Message for 'customer account name' with account number 'xyz'

Email Content

Dear 'customer account name',

The following message is from 'store's name from config'

This is your custom content.

← Enter your message

F12 Close   Test   F8 Send

- Send an email to all your customers with store credit (non-zero credit limit).
- Enter email text using this utility:
  - Go to **Maintain** menu > **Utilities** > **Customer Utilities** > **Email Charge Customer**
  - Email subject and salutation are automatically added.

Returns – Charge Only

- **Returns – Charge Only** employee access level has been added.

- Allows an employee to refund a return as a store credit using the **Charge** payment type ONLY.

- Return requirements:

  - To receive credit, the customer must have a non-zero credit limit with the store.

  - The original transaction can be any payment type (cash, check, etc.)

- Select on **File** > **Setup** > **Employees** tab.

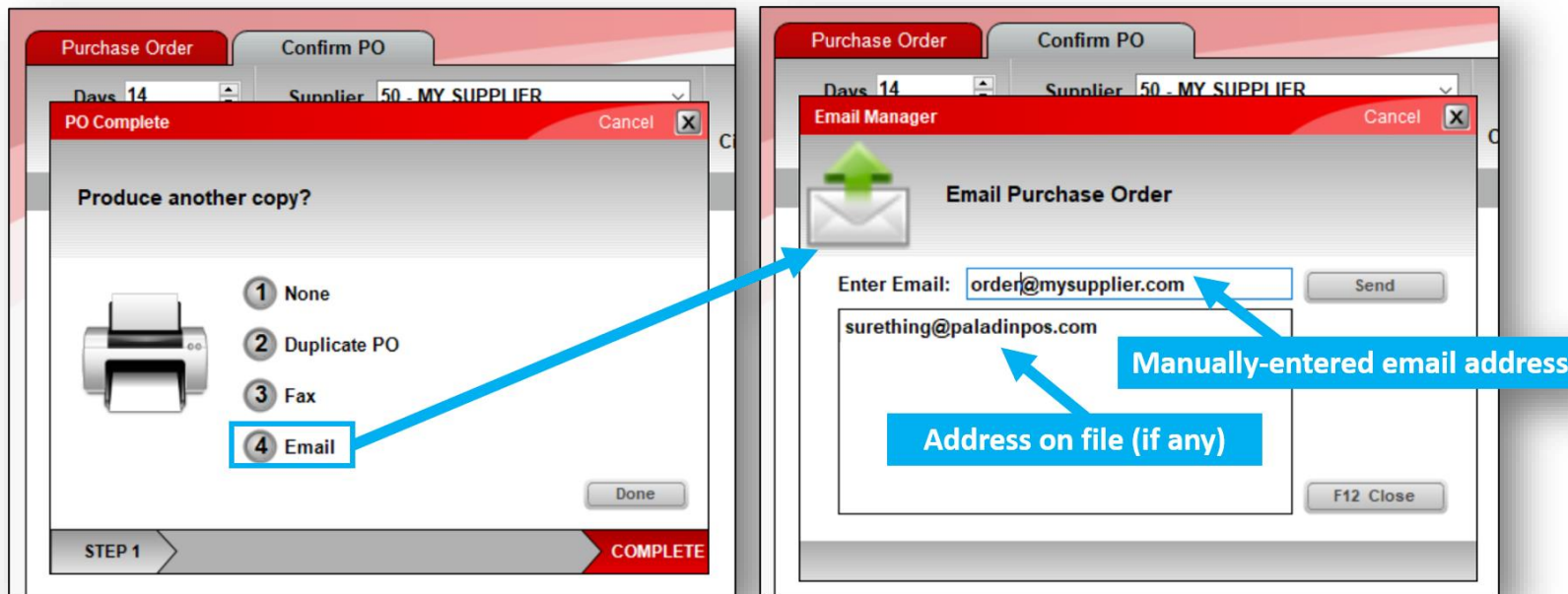- Employee must have **Invoicing** access.
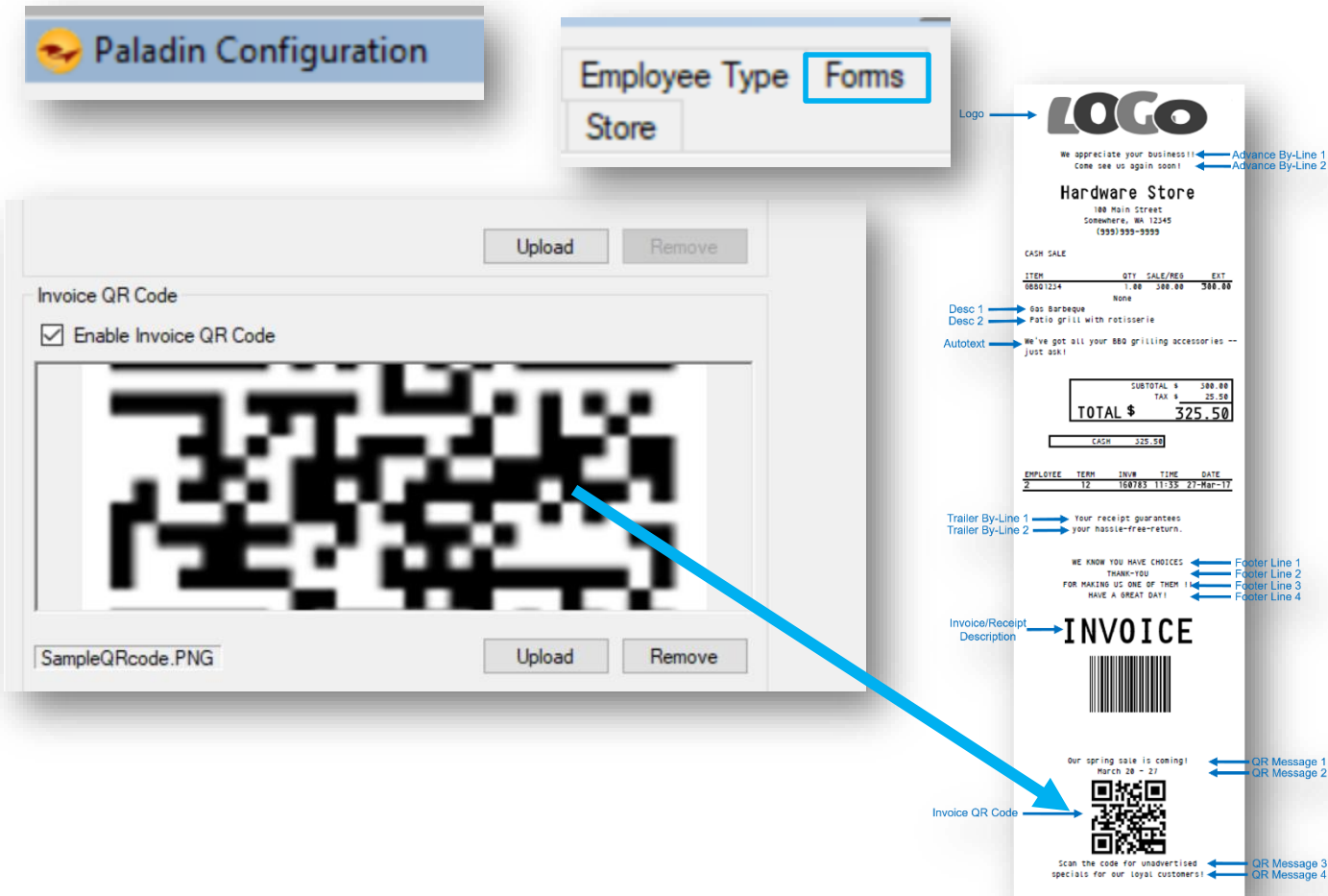
Collect on Delivery

- Collect on delivery (COD) feature allows your customers to pay for purchases when they are delivered.

- The feature is available in these scenarios:

  - When a customer has no store credit.

  - When a customer exceeds their store credit.

Email Purchase Orders to Any Address

- Email a purchase order to the supplier address on file or any other email addresses. Select or enter an email address and click **Send.**

- If there is no address on file, it will save the first manually-entered address. Otherwise, additional email addresses are not saved.

- Optional: Specify a return email address for emailed POs only. (Contact Paladin Support to set up.)
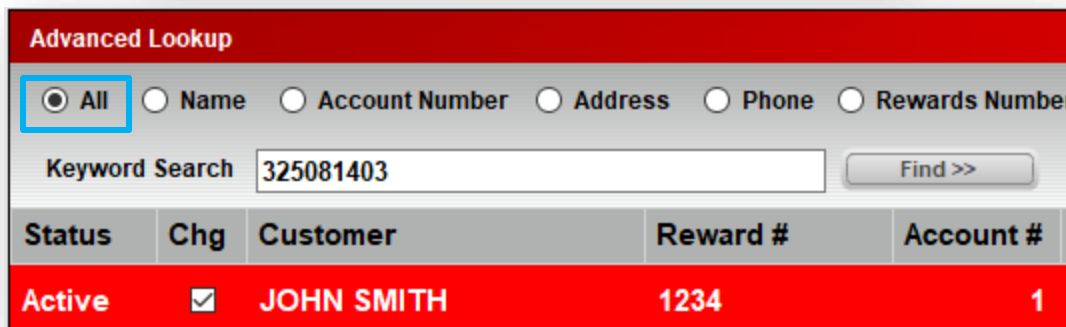
Multi-store: Individual QR Codes for Each Store

- In multi-store version of Paladin, invoice QR codes are now specific to each store.
- To add a QR code:
  1. Go to **File** > **Setup** > **Forms** tab
  2. In the **Invoice QR Code** pane, upload the store's QR code and click **Save**.
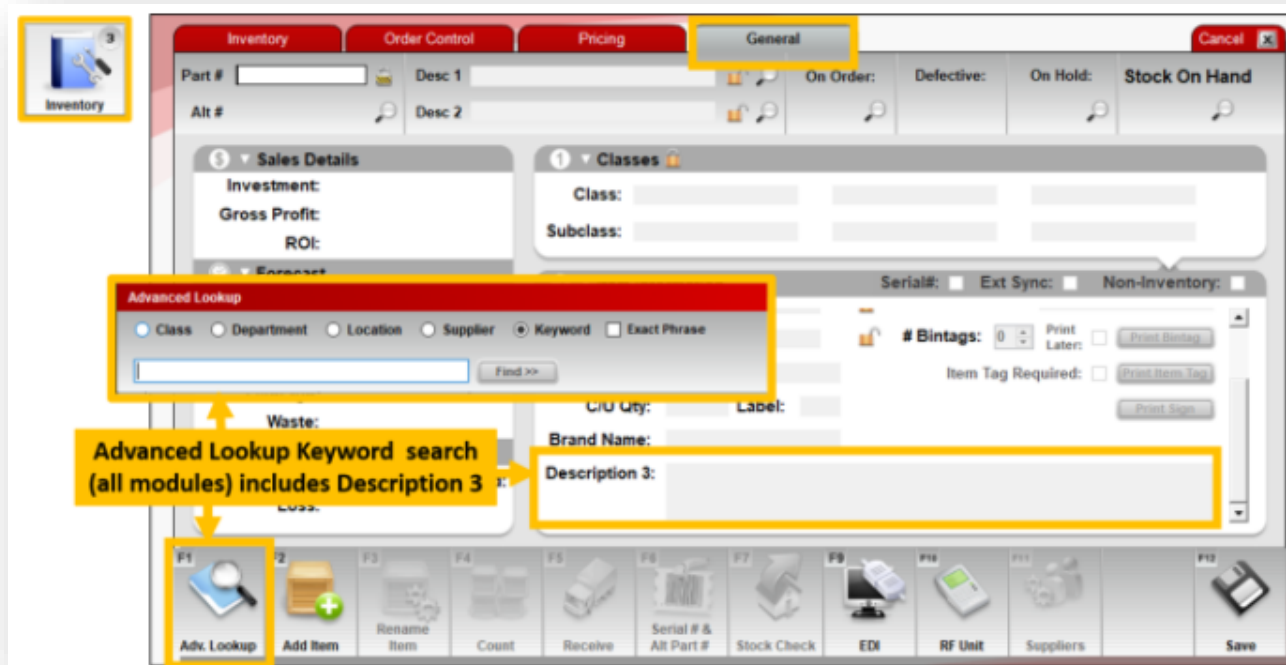
Advanced Lookup Searches Customer ACH Data

- In the **Customers** module, Advanced Lookup will search customer **ACH Check** fields when you do an **All** category search.

Description 3 Now in Advanced Lookup Keyword Search

- The **Advanced Lookup** [F1] feature will now search Description 3 when you perform a **Keyword** (default) search.

- The Description 3 field is found in the **Inventory** module on the **General** tab for each inventory item. This product description has a large character limit and is typically used to provide a long description of an item for webstore integrations, such as Volusion.

Exclude Description 2 from customer receipts

- A new setting **– Block Description 2 from Invoice and Reprints** – will prevent this secondary description from appearing on the customer's receipt.
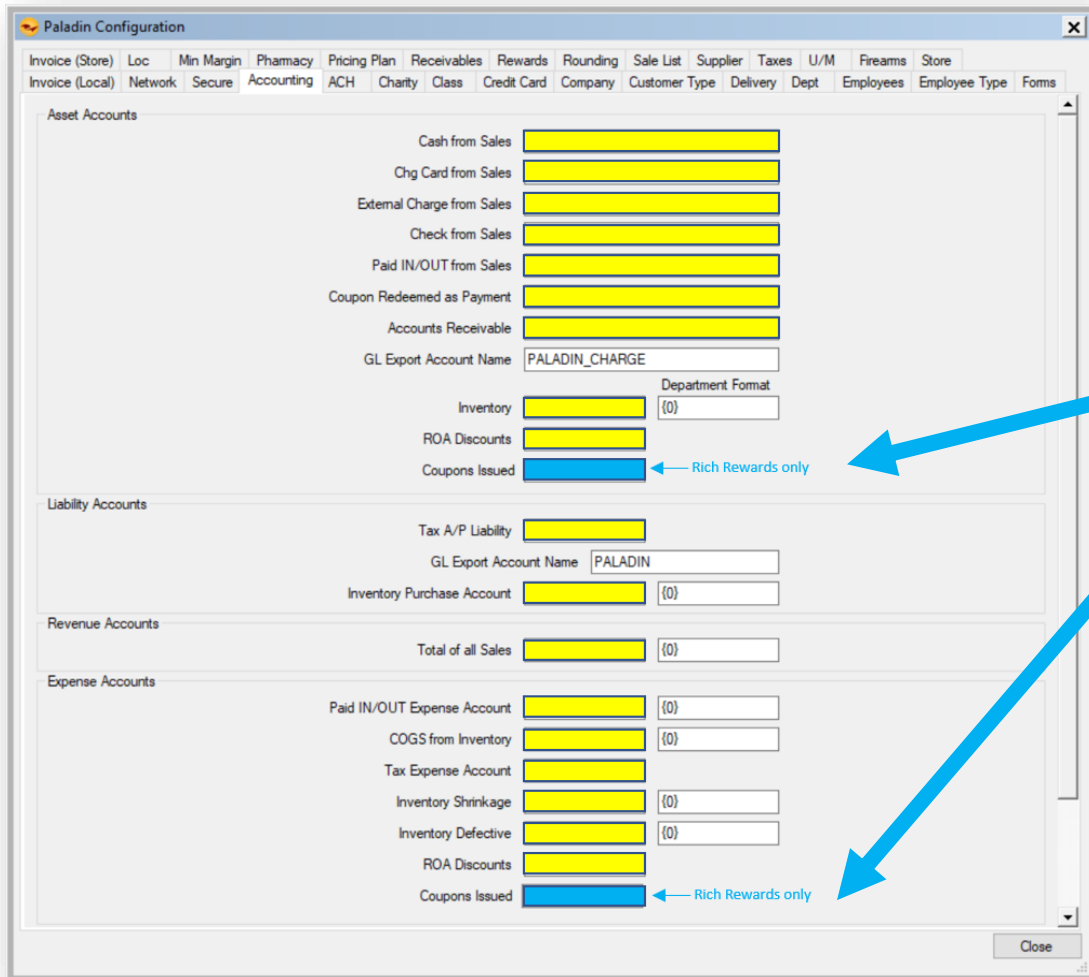
- The **Display Description 2 in Invoice/Quote** setting must be selected for this new setting to apply, and description 2 will continue to appear to the cashier on invoices in the **Invoice**/**Quote** module.

- To access these settings, on the **File** menu, click **Setup**, and then click **Invoice (Store)** tab.

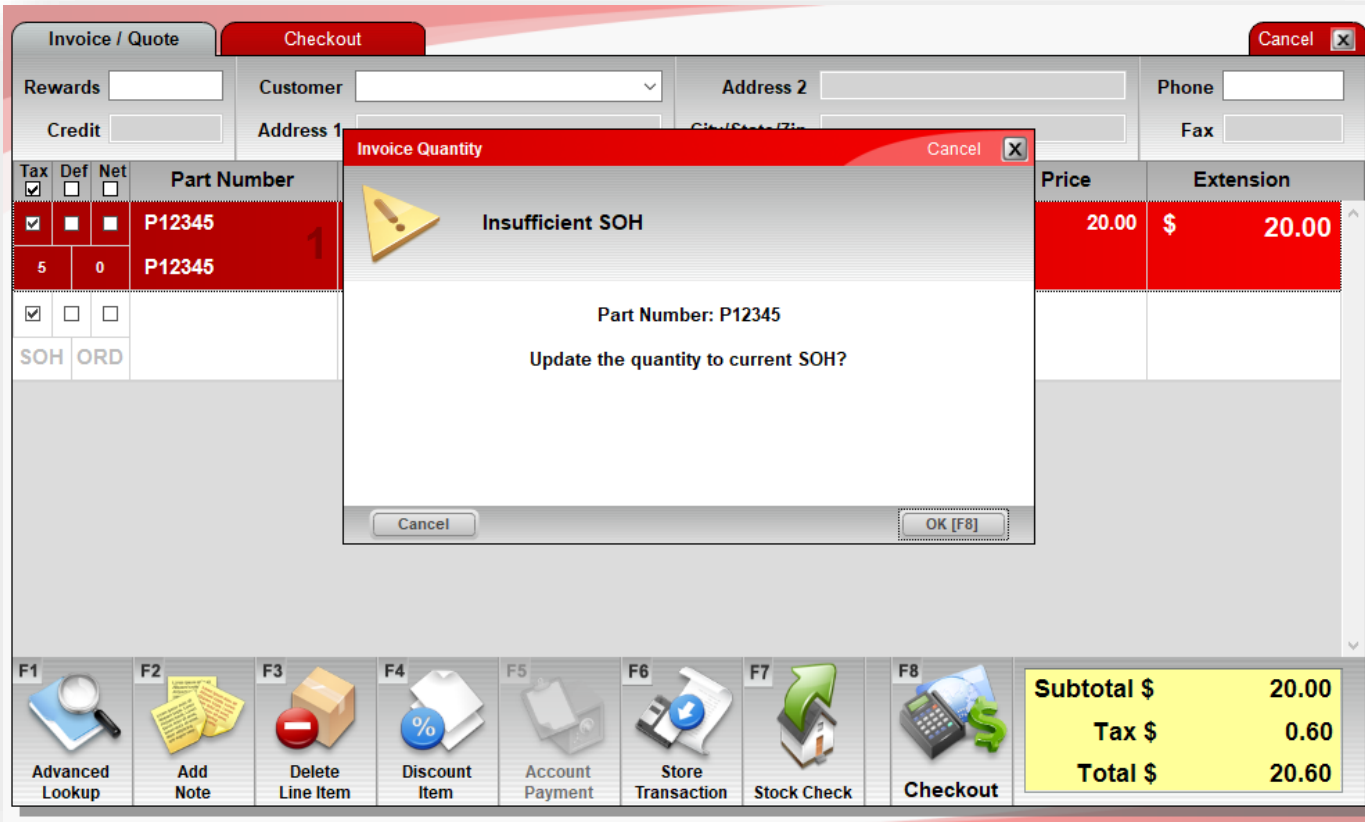# GL Summary: New Categories for Rich Rewards

- New accounting categories for Rich Rewards coupons issued by the store.
  - **File** > **Setup** > **Accounting** tab
  - **Asset Accounts: Coupons Issued**
  - **Expense Accounts: Coupons Issued**
- Rich Rewards store-issued coupons were previously accounted for in
  - **Asset Accounts: Inventory**
  - **Expense Accounts: COGS from Inventory**

Simplified Tax Holiday Sales and Accounting

- A tax holiday is a time period during which some items are sold tax-free or partially tax-free.

- Our tax holiday feature allows stores to apply tax holiday discounts quickly and easily at checkout using the quick access (right-click) menu or by pressing Ctrl + T.

Insufficient SOH (Oversold) Alert

- In the **Invoice/Quote** module, when you enter a quantity greater than your current SOH, a message appears with options:

  - Click **OK** or press F8 to adjust the invoice quantity to current SOH.

  - Click **Cancel** to accept the entered quantity.

- Message does not appear for non-inventory (dump SKU) items.

- Optional: Only check items in a specified location range.

Benjamin Moore Program Reports
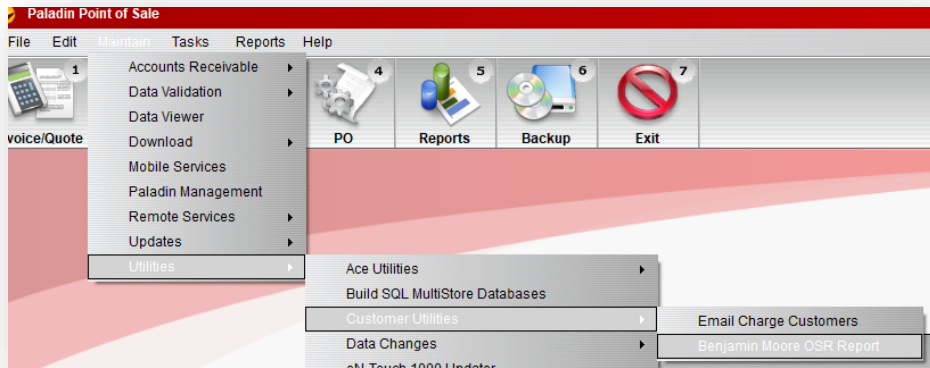
- If you participate in Benjamin Moore OSR (Outside Sale Rep) or CCP (Contractor & Commercial Pricing) programs, Paladin can create the reports required by Benjamin Moore.

- Access from **Maintain** menu.

New Item and Bin Tags

- New Bin Tags #41 and #42
- New Item Tag #18 (barbell shaped tag to wrap around jewelry and other items)
- See these and more in the Paladin LTSR Catalog

Incremental Part Numbers for Added Inventory

- Maintain a series of unique sequential alternate part numbers (X00001, X00002, and so on) when you add inventory items manually.

- Available with the **Add Item** [F2] feature or when you use the inventory import feature in the **Data Viewer**.

Export Your Sales into Excel
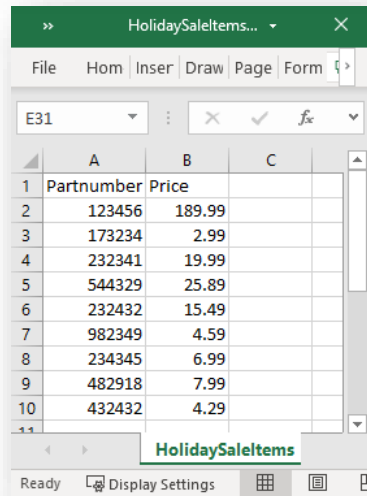
- A new **Export Sale List** feature lets you export sale item part numbers and prices into a tab-delimited text file that can be opened in Excel.

- From there, you can edit items and prices and re-import to update the sale or add to a new sale.

- Access from **File** > **Setup** > **Sale List** tab. Click **Edit** and then click **Export**.

Accounting Integrations Updates
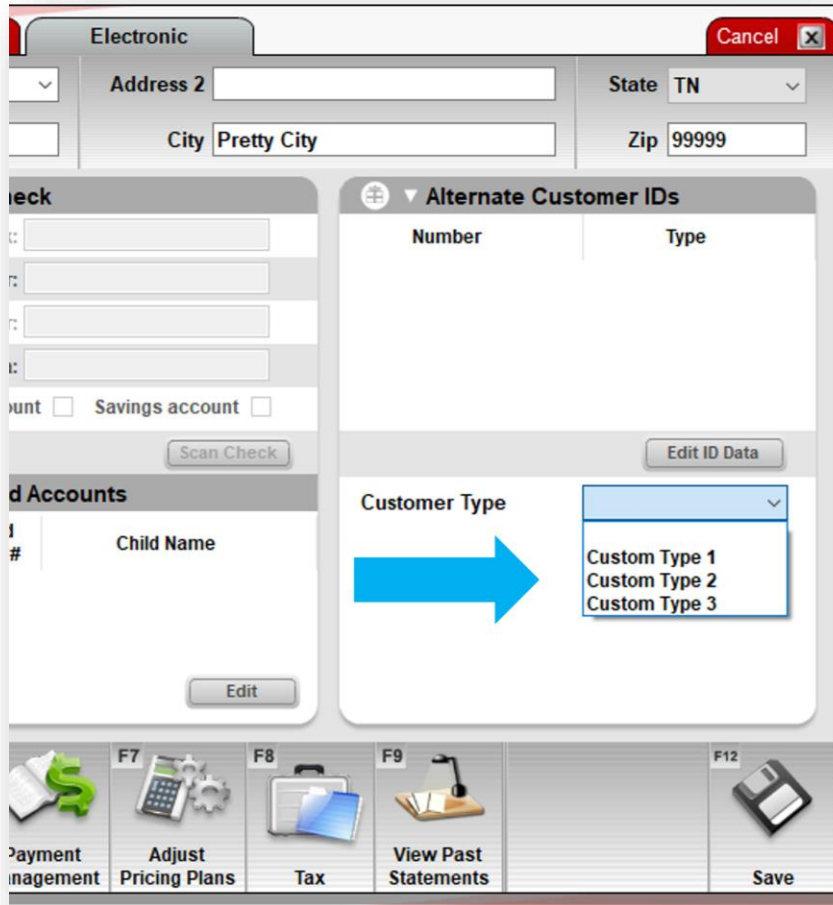
- You can reverse received purchase orders after vendor bills have been created in your accounting software.
  - Requires manager approval.
  - Must remove the vendor bill from your accounting software separately.
- QuickBooks only: If you enter a Supplier Invoice Number when you receive a PO, it will be used as the reference number for the vendor bill in QuickBooks. Otherwise, the Paladin PO number is used.

Capital One Trade Credit Rebranding
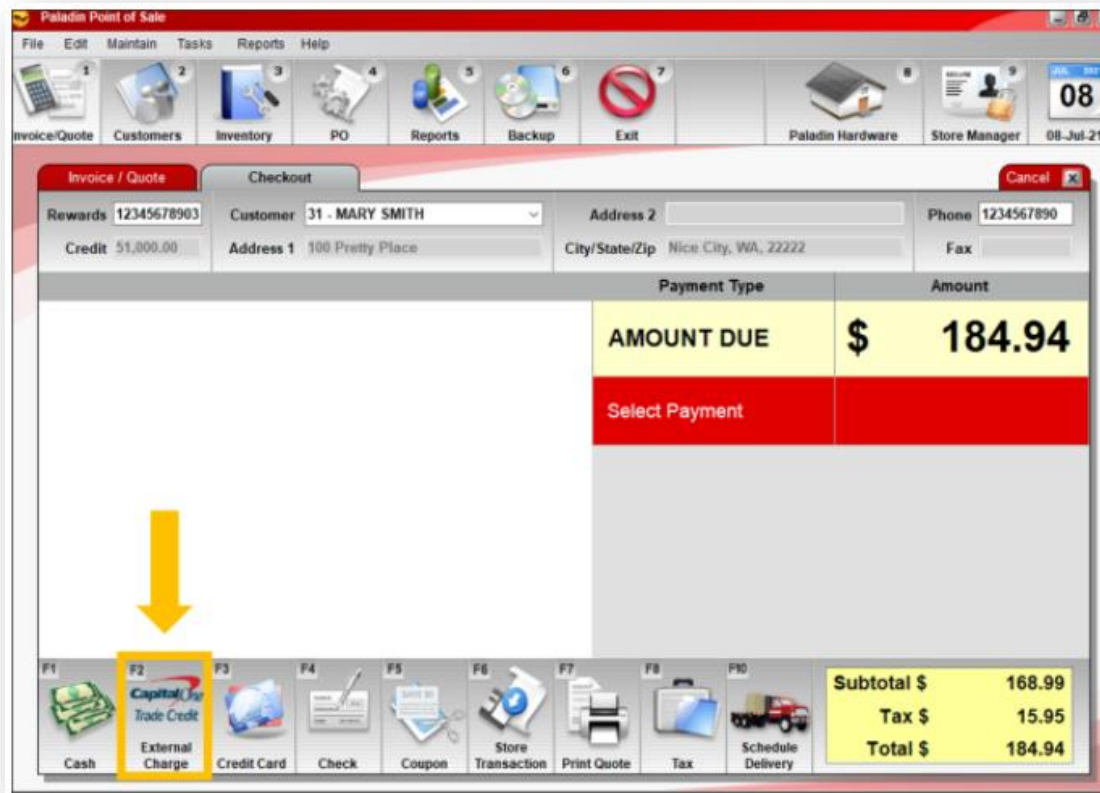
- A few years ago, Paladin partnered with BlueTarp, now Capital One Trade Credit, to integrate with its third-party financial service designed to protect businesses from credit risk.

- We've updated our interface to reflect the new Capital One Trade Credit brand. Otherwise, nothing about the integration has changed.

Limit customer types to those that you create

- Hide default customer types and only show those that you create for your store with a new setting.

- Customer types let you categorize customers and provide business statistics by type in reports, such as the Transaction Report and Comparative Revenue Report.

- To apply this setting, on the **File** menu, click **Setup**, click the **Customer Type** tab and select **Hide default types from dropdowns**. Then, click **Save**.

Learn more

[Paladin 2021-A Release Guide](#)

[Paladin 2021-B Release Guide](#)

[Paladin 2021-C Release Guide](#)

[Paladin 2021-D Release Guide](#)

portal.paladinpos.com/release-notes/new-features/paladin-2021-a-release-guide/

portal.paladinpos.com/release-notes/new-features/release-2021-b/

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portal.paladinpos.com/knowledge-base/paladin-2021-d-release-guide/

Next webinar:

National Cybersecurity Awareness Month:

How Paladin can Protect Your Business

October 5 @ 9am PT

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