



ORGILL

Fall Virtual User Meeting

Charles Owen

Chief Experience Officer

August 24, 2021

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 searches customer ACH data
 - New GL categories for Rich Rewards coupons

WHAT YOU'LL LEARN

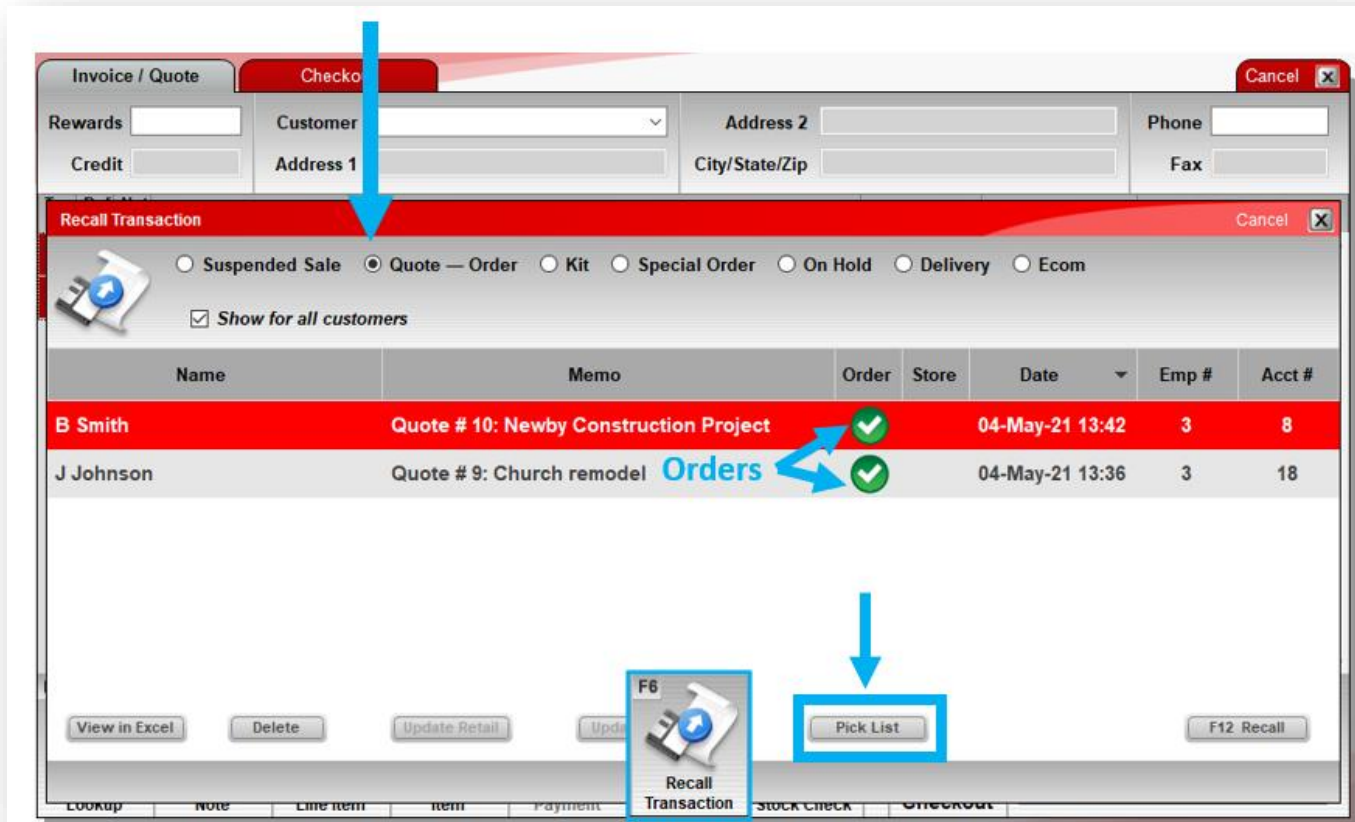
- Newly released:
 - Adding incremental part numbers when adding inventory
 - Simplified tax holiday sales and accounting
 - Insufficient stock on hand alert
 - Benjamin Moore programs reports
 - New bin and item tags
 - Advanced Lookup Description 3
 - Export sales into Excel
 - Accounting integration 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.

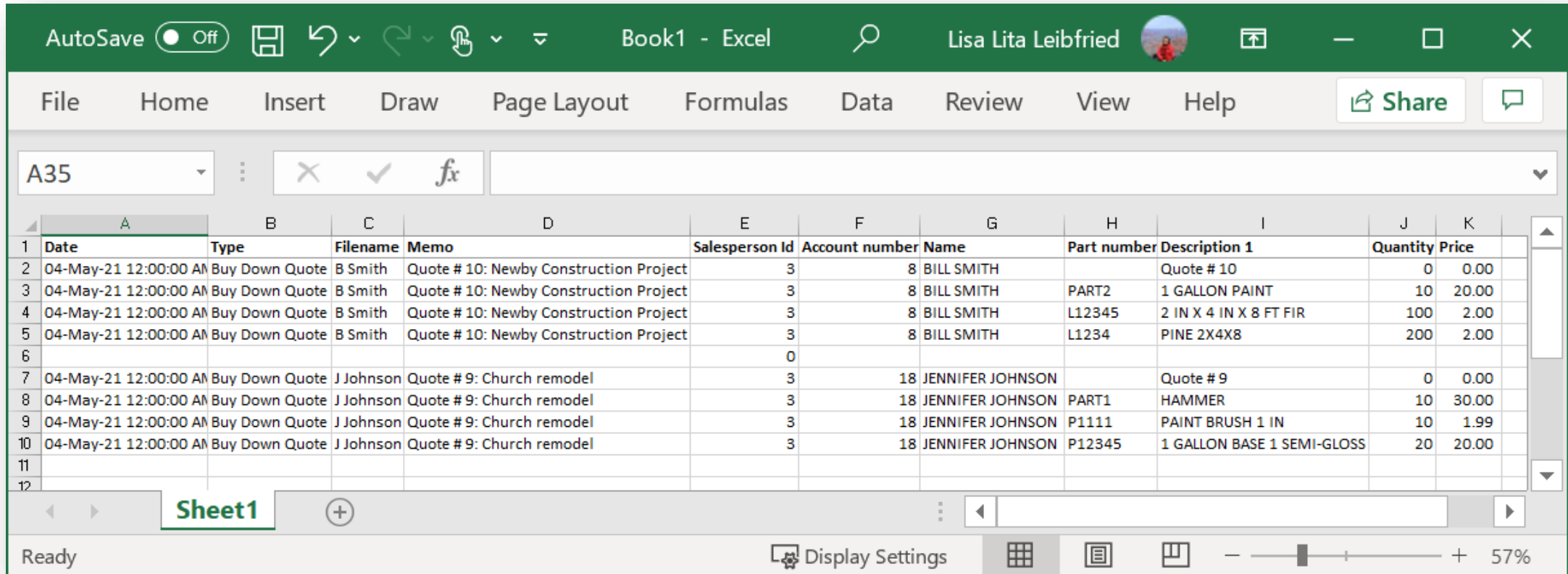
1. Open the **Invoice/Quote** module.
2. Select a customer (optional).
3. Click **Recall Transaction** and select **Quote – Order**.
4. To show all orders, select **Show for all customers**.
5. Click **Pick List** to create the spreadsheet.



Name	Memo	Order	Store	Date	Emp #	Acct #
B Smith	Quote # 10: Newby Construction Project	✓		04-May-21 13:42	3	8
J Johnson	Quote # 9: Church remodel	✓		04-May-21 13:36	3	18

Pick List

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



AutoSave ☐ Off

Book1 - Excel

Lisa Lita Leibfried

File Home Insert Draw Page Layout Formulas Data Review View Help

Share

A35

	A	B	C	D	E	F	G	H	I	J	K
	Date	Type	Filename	Memo	Salesperson Id	Account number	Name	Part number	Description 1	Quantity	Price
1	04-May-21 12:00:00 AM	Buy Down Quote	B Smith	Quote # 10: Newby Construction Project	3	8	BILL SMITH		Quote # 10	0	0.00
2	04-May-21 12:00:00 AM	Buy Down Quote	B Smith	Quote # 10: Newby Construction Project	3	8	BILL SMITH	PART2	1 GALLON PAINT	10	20.00
3	04-May-21 12:00:00 AM	Buy Down Quote	B Smith	Quote # 10: Newby Construction Project	3	8	BILL SMITH	L12345	2 IN X 4 IN X 8 FT FIR	100	2.00
4	04-May-21 12:00:00 AM	Buy Down Quote	B Smith	Quote # 10: Newby Construction Project	3	8	BILL SMITH	L1234	PINE 2X4X8	200	2.00
5					0						
6											
7	04-May-21 12:00:00 AM	Buy Down Quote	J Johnson	Quote # 9: Church remodel	3	18	JENNIFER JOHNSON		Quote # 9	0	0.00
8	04-May-21 12:00:00 AM	Buy Down Quote	J Johnson	Quote # 9: Church remodel	3	18	JENNIFER JOHNSON	PART1	HAMMER	10	30.00
9	04-May-21 12:00:00 AM	Buy Down Quote	J Johnson	Quote # 9: Church remodel	3	18	JENNIFER JOHNSON	P1111	PAINT BRUSH 1 IN	10	1.99
10	04-May-21 12:00:00 AM	Buy Down Quote	J Johnson	Quote # 9: Church remodel	3	18	JENNIFER JOHNSON	P12345	1 GALLON BASE 1 SEMI-GLOSS	20	20.00
11											
12											

Sheet1

Ready

Display Settings

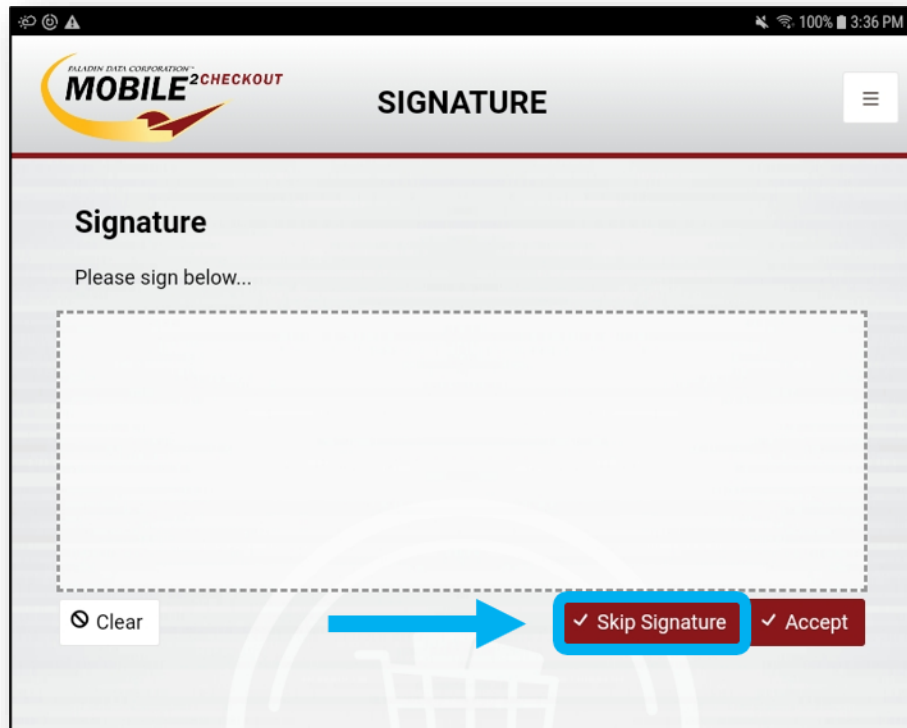
57%

Declutter your quotes by removing older ones



- 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.

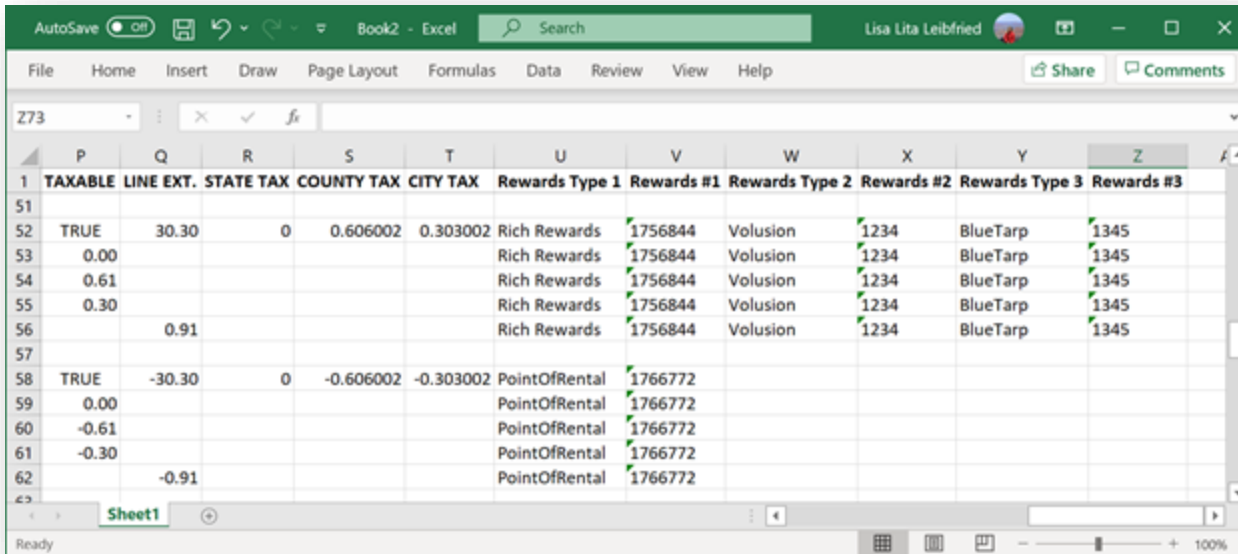
Skip signatures on Mobile2Checkout app



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.

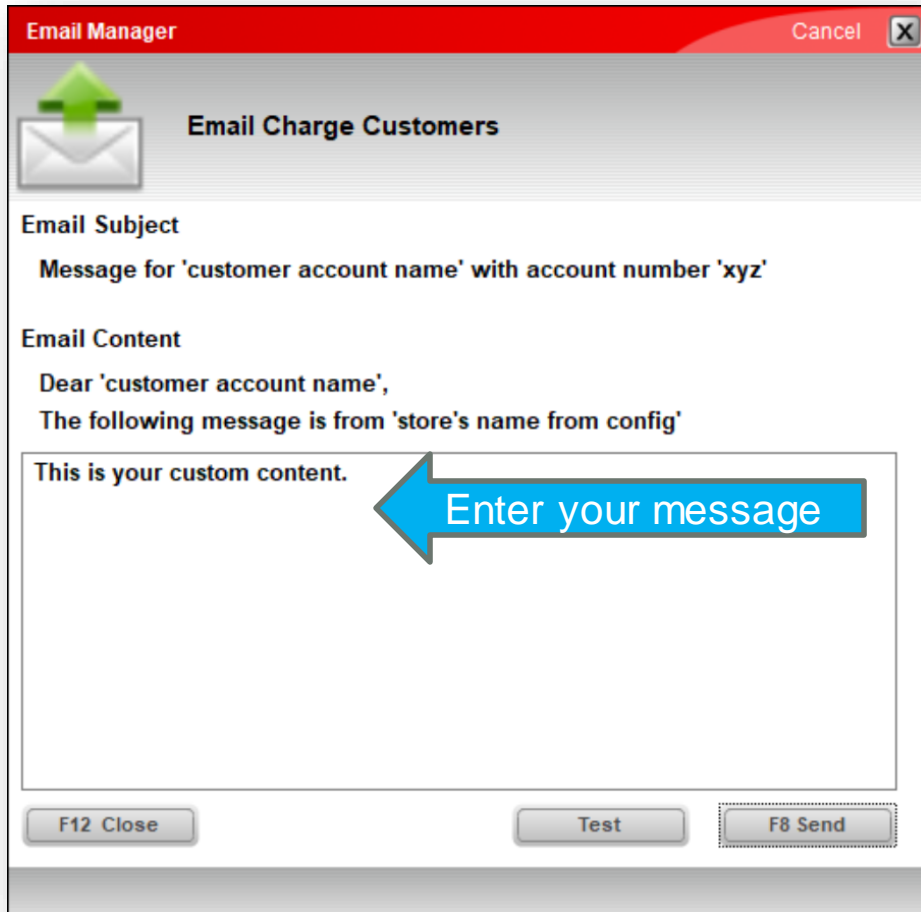
Transaction Report includes Rewards IDs



	P	Q	R	S	T	U	V	W	X	Y	Z
1	TAXABLE	LINE EXT.	STATE TAX	COUNTY TAX	CITY TAX	Rewards Type 1	Rewards #1	Rewards Type 2	Rewards #2	Rewards Type 3	Rewards #3
51											
52	TRUE	30.30	0	0.606002	0.303002	Rich Rewards	1756844	Volusion	1234	BlueTarp	1345
53	0.00					Rich Rewards	1756844	Volusion	1234	BlueTarp	1345
54	0.61					Rich Rewards	1756844	Volusion	1234	BlueTarp	1345
55	0.30					Rich Rewards	1756844	Volusion	1234	BlueTarp	1345
56		0.91				Rich Rewards	1756844	Volusion	1234	BlueTarp	1345
57											
58	TRUE	-30.30	0	-0.606002	-0.303002	PointOfRental	1766772				
59	0.00					PointOfRental	1766772				
60	-0.61					PointOfRental	1766772				
61	-0.30					PointOfRental	1766772				
62		-0.91				PointOfRental	1766772				

- 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

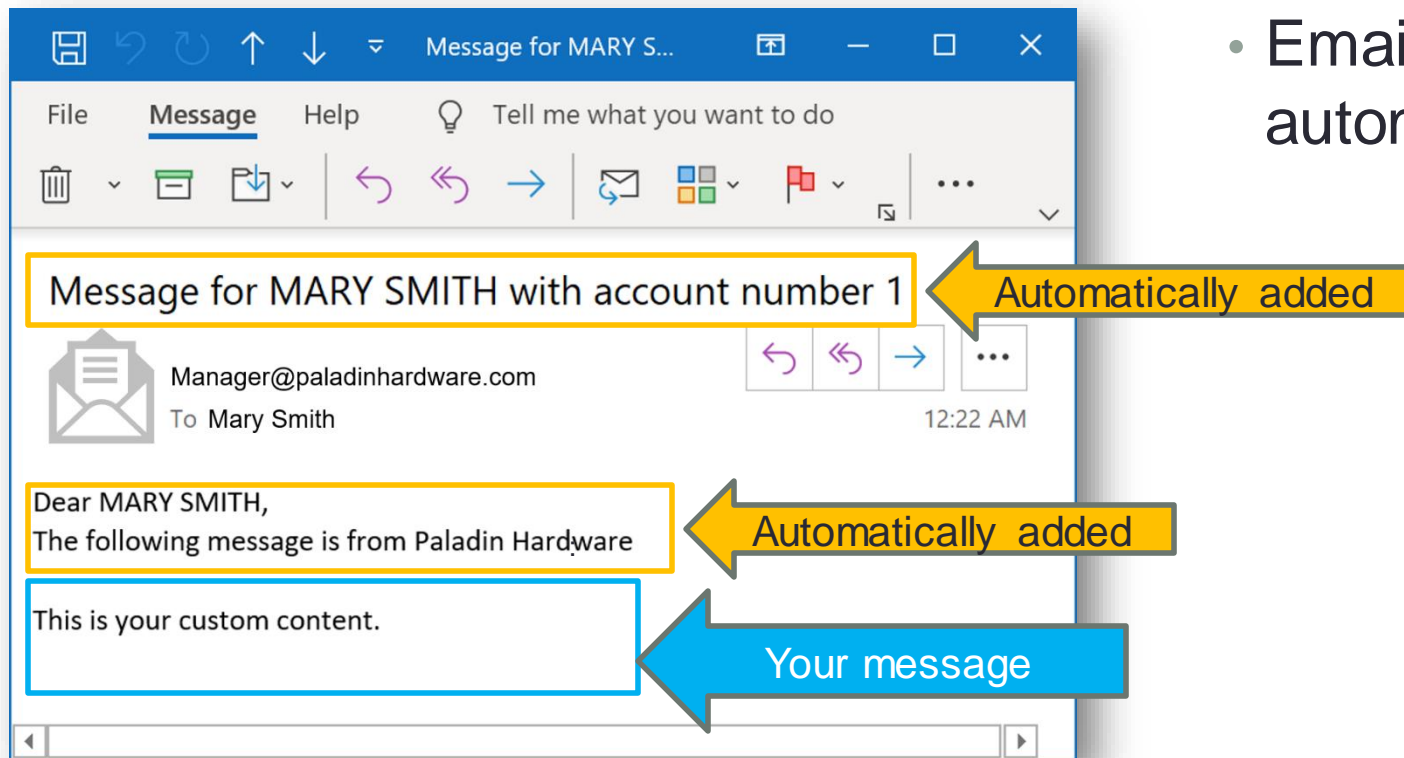


The screenshot shows a software window titled "Email Manager" with a red header bar containing a "Cancel" button and a close icon. Below the header is a grey bar with a green envelope icon and the text "Email Charge Customers". The main area is divided into sections: "Email Subject" with the text "Message for 'customer account name' with account number 'xyz'", and "Email Content" with the text "Dear 'customer account name', The following message is from 'store's name from config'". Below this is a large text area containing "This is your custom content." and a blue arrow pointing left with the text "Enter your message". At the bottom are three buttons: "F12 Close", "Test", and "F8 Send".

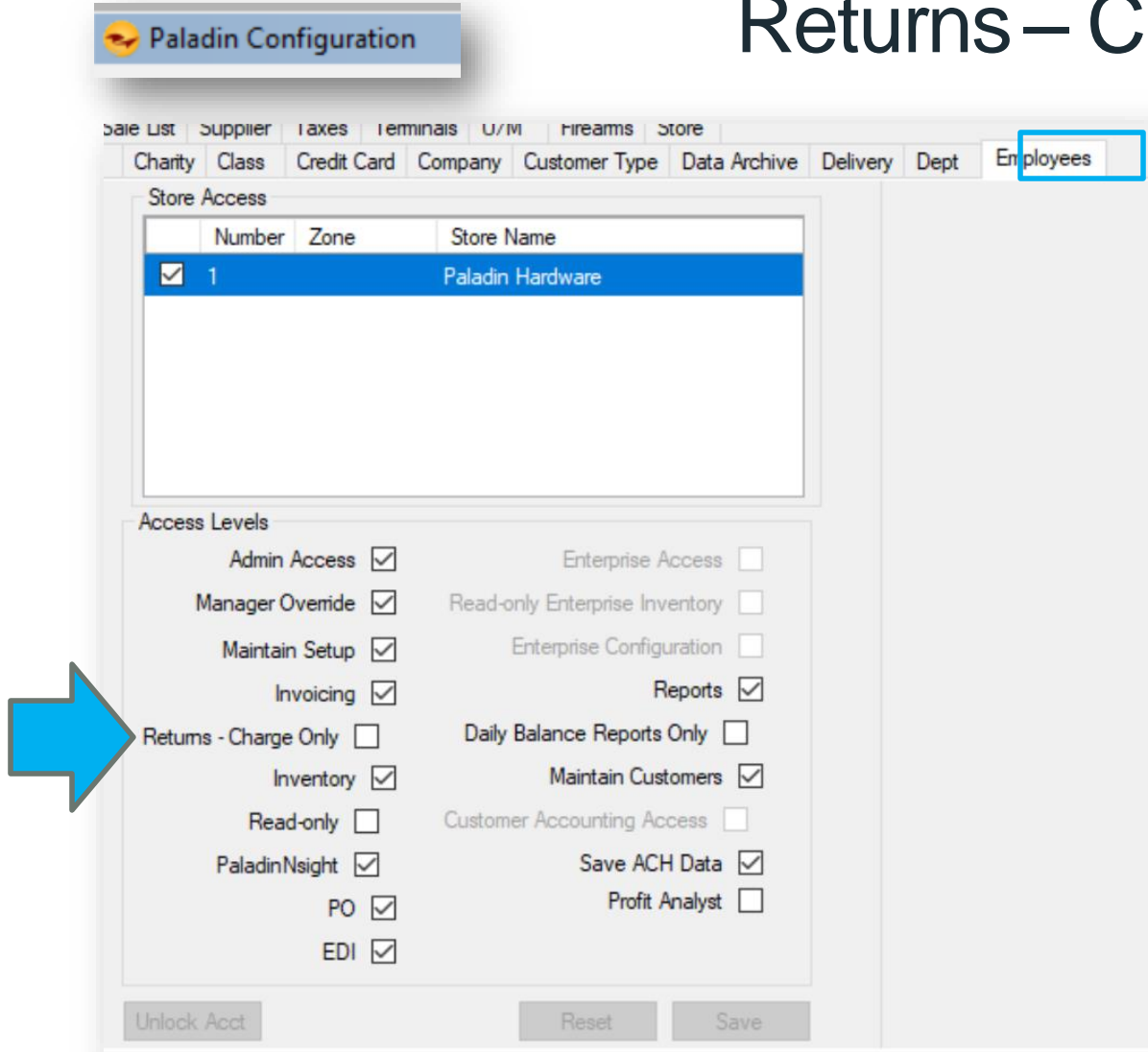
- Send an email to all your customers with store credit (non-zero credit limit).
- Enter email text using this utility:
 - Go to **Maintain** menu > **Utilities** > **Customer Utilities** > **Email Charge Customer**

Charge Customer Email Utility

- Email subject and salutation are automatically added.



Returns – Charge Only



Paladin Configuration

File List | Supplier | Taxes | Terminals | U/M | Firearms | Store | Charity | Class | Credit Card | Company | Customer Type | Data Archive | Delivery | Dept | **Employees**

Store Access

	Number	Zone	Store Name
<input checked="" type="checkbox"/>	1		Paladin Hardware

Access Levels

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

Unlock Acct | Reset | Save

- **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.

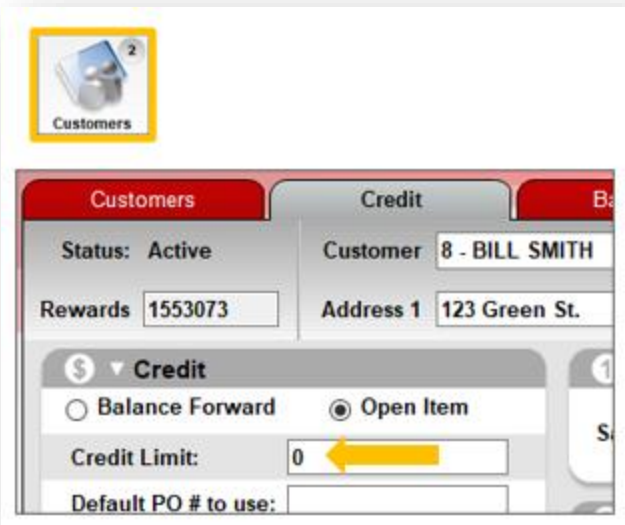
Collect on Delivery



- 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.

COD: When a customer has no store credit

When the COD feature is turned on and you select **Schedule Delivery** for a customer who does not have a store line of credit (credit limit of zero), the **Charge** payment type becomes available.



Customers

Status: Active

Rewards: 1553073

Customer: 8 - BILL SMITH

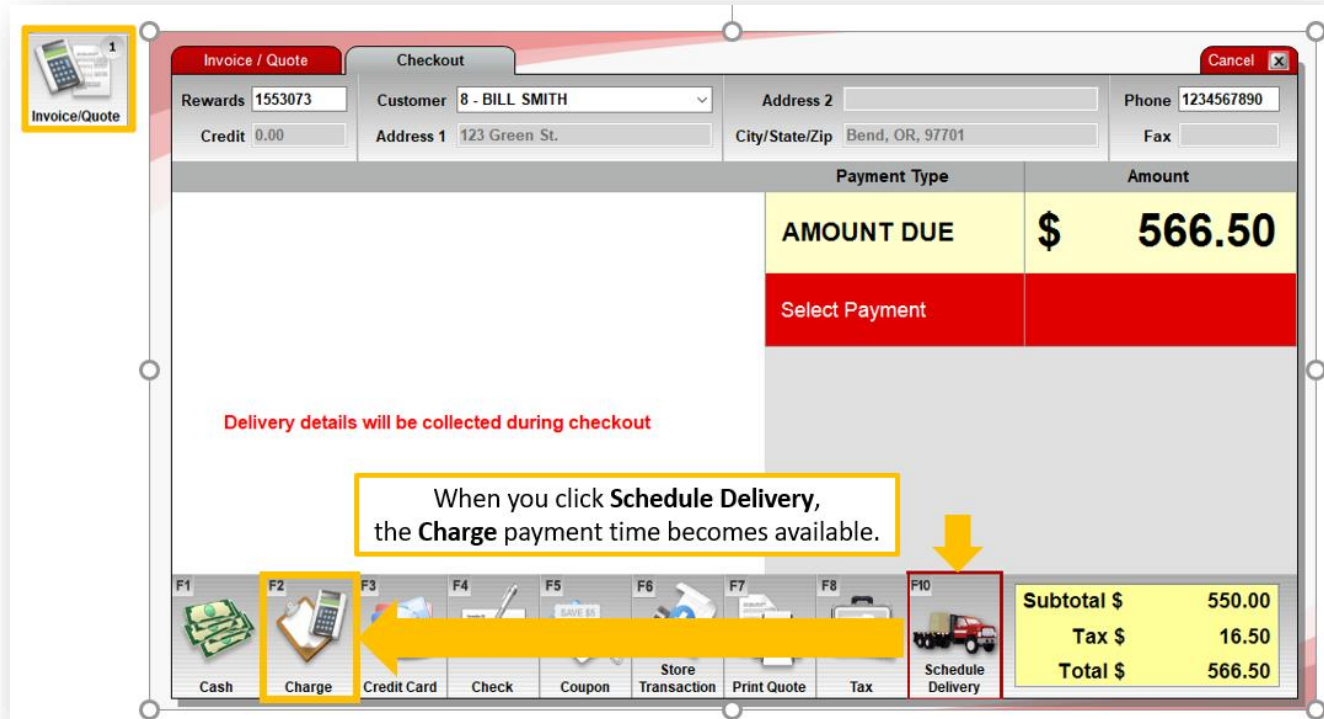
Address 1: 123 Green St.

Credit

☐ Balance Forward ☒ Open Item

Credit Limit: 0

Default PO # to use:



Invoice / Quote

Rewards: 1553073

Credit: 0.00

Customer: 8 - BILL SMITH

Address 1: 123 Green St.

Address 2:

City/State/Zip: Bend, OR, 97701

Phone: 1234567890

Fax:

Payment Type	Amount
AMOUNT DUE	\$ 566.50
Select Payment	

Delivery details will be collected during checkout

When you click **Schedule Delivery**, the **Charge** payment time becomes available.

F1 Cash **F2** Charge **F3** Credit Card **F4** Check **F5** Coupon **F6** Store Transaction **F7** Print Quote **F8** Tax **F10** Schedule Delivery

Subtotal \$	550.00
Tax \$	16.50
Total \$	566.50

COD: When a customer has no store credit

Thanks for shopping
our friendly store.

BILL SMITH
123 Green St.
Bend, OR 97701
1234567890 ACCOUNT #: 8

ITEM	QTY	SALE/REG	EXT
***** COLLECT \$566.50 ON DELIVERY *****			
PART1	25.00	22.00	550.00
EACH			
HAMMER			
*** DELIVERY * DELIVERY * DELIVERY ***			
Scheduled: 23-Apr-21, 10:00 AM - 10:30 AM			
Email: lisal@paladinpos.com			
Delivery Phone #: (123) 456-7890			
Address:			
123 Green St.			
Bend, OR 97701			
*** DELIVERY * DELIVERY * DELIVERY ***			
***** COLLECT \$566.50 ON DELIVERY *****			

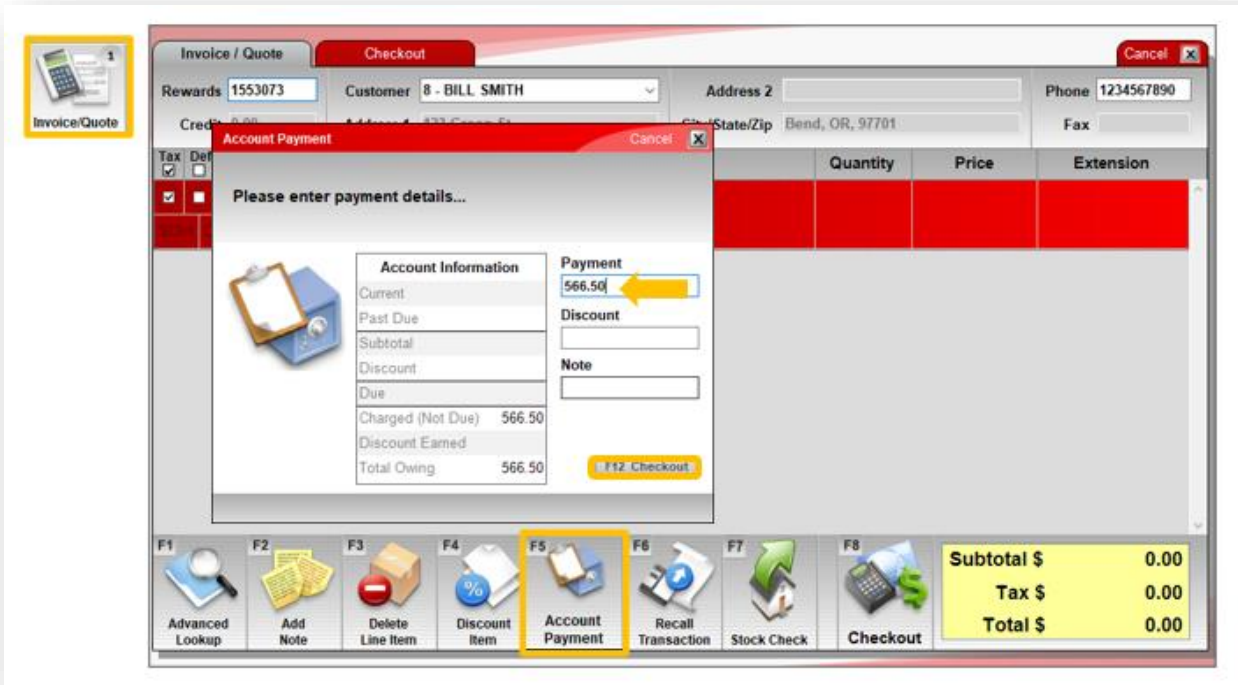
SUBTOTAL \$	550.00
TAX \$	16.50
TOTAL \$	566.50

CHARGE	566.50
--------	--------

Amount to collect on delivery
(COD) appears on the receipt

The cashier completes the sale, and the receipt shows the amount to collect on delivery.

COD: When a customer has no store credit



The screenshot displays the 'Account Payment' dialog box in the University software. The dialog box is titled 'Please enter payment details...' and contains the following fields:

- Payment:** 566.50 (highlighted with a yellow arrow)
- Discount:** (empty field)
- Note:** (empty field)

The background shows the 'Invoice / Quote' window with the following information:

- Customer:** 8 - BILL SMITH
- Address 2:** Bend, OR, 97701
- Phone:** 1234567890
- Fax:** (empty field)

The bottom of the screen shows a toolbar with the following icons and labels:

- F1: Advanced Lookup
- F2: Add Note
- F3: Delete Line Item
- F4: Discount Item
- F5: Account Payment (highlighted with a yellow box)
- F6: Recall Transaction
- F7: Stock Check
- F8: Checkout


The bottom right corner shows a summary table:

Subtotal \$	0.00
Tax \$	0.00
Total \$	0.00

- Payment is collected when the delivery is made.
- Once back at the store, the payment is applied as an **Account Payment** in the **Invoice/Quote** or **Customers** module.
- These payments are recorded as **Charge** payments in the customer's **Sales History**.

COD: When a customer exceeds their store credit

The COD option will also appear for customers who have a store line of credit when the **Charge** amount exceeds their available credit.



Customers

Credit

Balance

Status: Active

Customer: 1 - MARY SMITH

Rewards: 1234

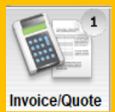
Address 1: 100 MAIN STREET

Credit

☒ Balance Forward
 ☐ Open Item

Credit Limit: 1000

Default PO # to use:



Invoice / Quote

Checkout

Cancel

Rewards: 1234

Customer: 1 - MARY SMITH

Address 2:

Phone: 5858585858

Credit: 1,000.00

Address 1: 100 MAIN STREET

City/State/Zip: BEAUTIFUL CITY, KS, 00000

Fax:

Account Warnings

Cancel

Manager approval needed...

- Invoice charge amount: \$ 2,060.00
 - Credit limit will be exceeded by: \$ 1,055.00
☐ Collect this amount on delivery: COD (Manager password not required)

Payment Type	Amount
AMOUNT DUE	\$ 0.00
Charge	\$ 2,060.00
CHANGE DUE	\$ 0.00
Subtotal \$	2,000.00
Tax \$	60.00
Total \$	2,060.00

STEP 1

Cash Charge Credit Card Check Coupon Store Transaction Print Quote Tax Schedule Delivery

If the purchase amount exceeds a customer's available (non-zero) credit limit, the COD option is also available.

COD: When a customer exceeds their store credit

Thanks for shopping
our friendly store.

MARY SMITH
100 MAIN STREET
BEAUTIFUL CITY, KS 00000
58585858 ACCOUNT #: 1

ITEM	QTY	SALE/REG	EXT
***** COLLECT \$2060.00 ON DELIVERY *****			
PART1	100.00	20.00	2000.00
EACH			
HAMMER			
*** DELIVERY * DELIVERY * DELIVERY ***			
Scheduled: 26-Apr-21, 03:00 PM - 03:30 PM			
Email: lisa@paladinpos.com			
Delivery Phone #: (123) 321-1234			
Address: 100 MAIN STREET BEAUTIFUL CITY, KS 00000			
*** DELIVERY * DELIVERY * DELIVERY ***			
***** COLLECT \$2060.00 ON DELIVERY *****			

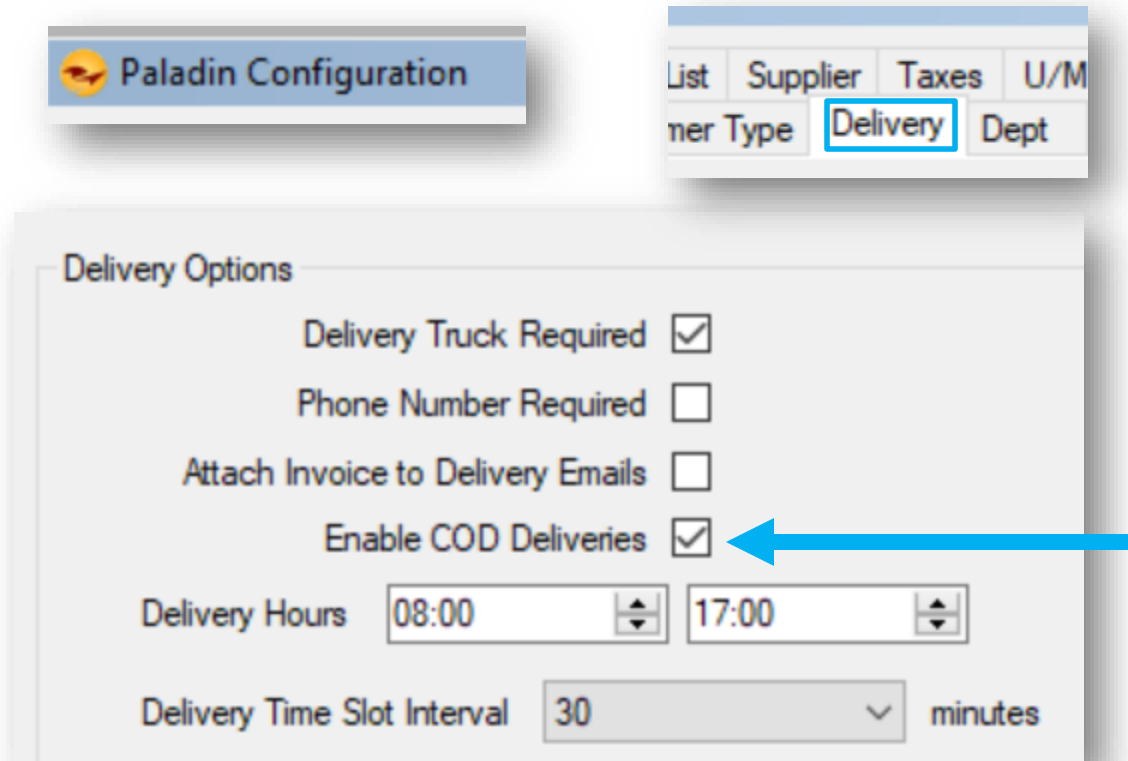
SUBTOTAL \$	2,000.00
TAX \$	60.00
TOTAL \$	2,060.00

CHARGE 2,060.00

Full invoice amount will be collected on delivery (COD)

If you select the COD option, the entire invoice amount will be due at delivery.

Turn on Collect on Delivery (COD) feature



Paladin Configuration

List	Supplier	Taxes	U/M
ner Type	Delivery		Dept

Delivery Options

- Delivery Truck Required ☒
- Phone Number Required ☐
- Attach Invoice to Delivery Emails ☐
- Enable COD Deliveries ☒

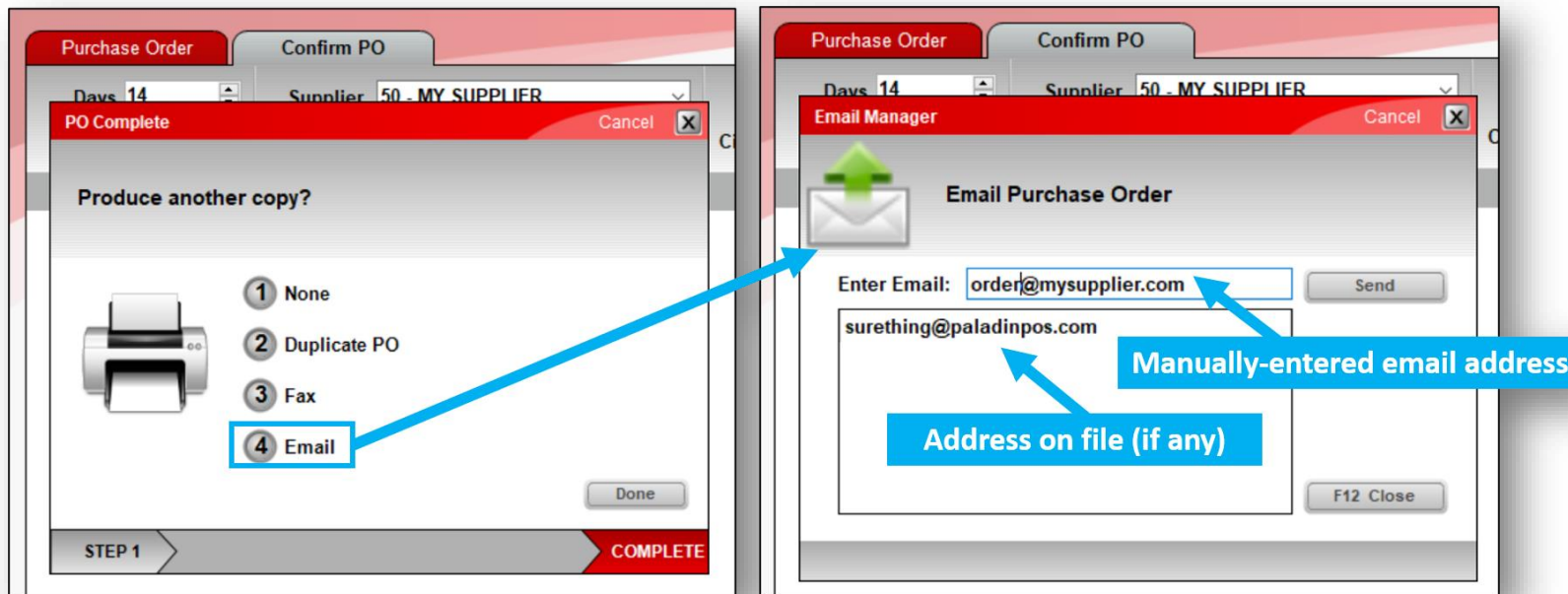
Delivery Hours: 08:00 to 17:00

Delivery Time Slot Interval: 30 minutes

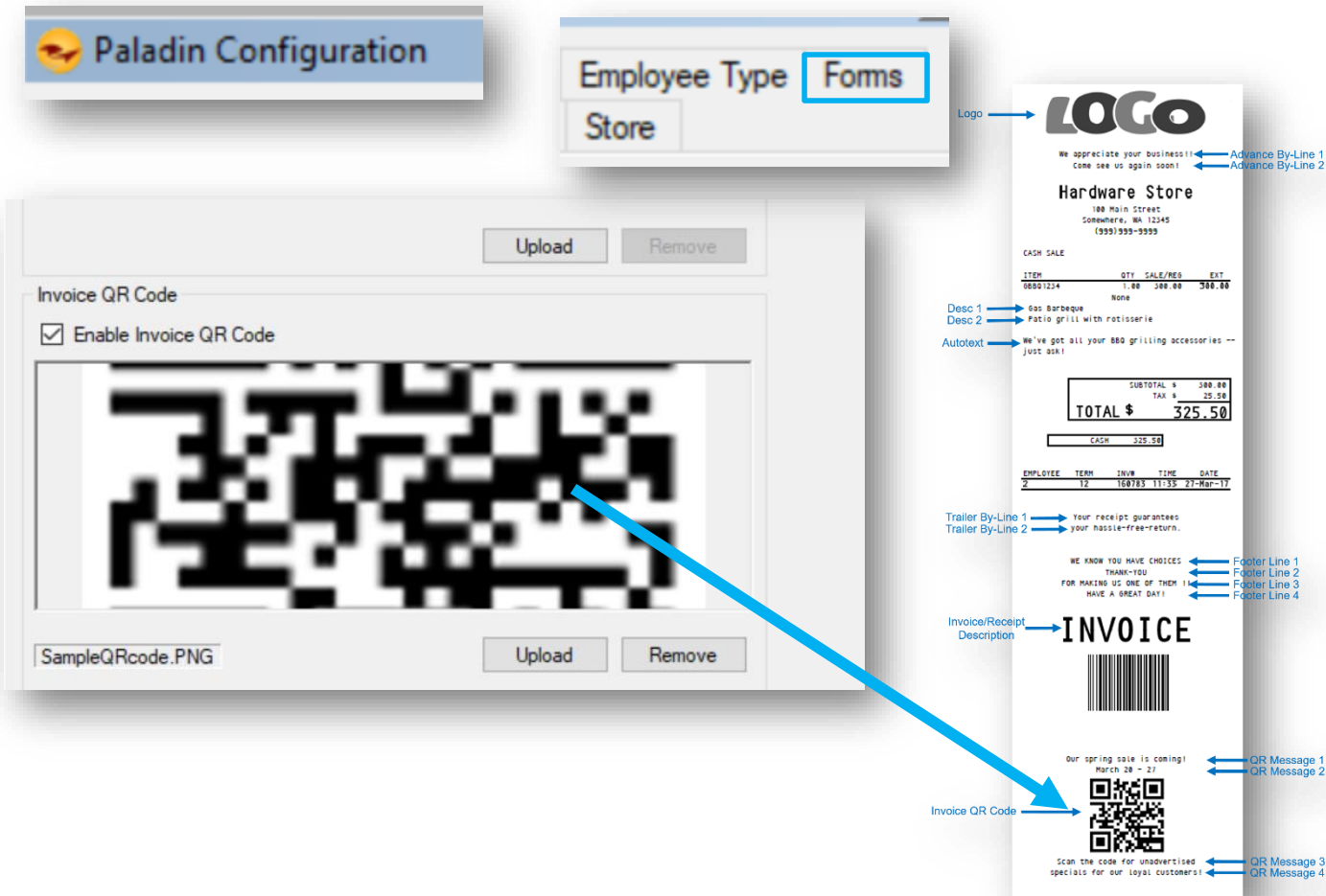
- Must be set up for deliveries (requires Paladin Support)
- To turn on COD feature (does not require Paladin Support):
 1. Go to **File** menu > **Setup** > **Delivery** tab.
 2. Select **Enable COD Deliveries**.
 3. Click **Save**.

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



Paladin Configuration

Employee Type **Forms**

Store

Upload Remove

Invoice QR Code

☒ Enable Invoice QR Code

SampleQRcode.PNG

Upload Remove

Logo

LOGO

We appreciate your business!!
Come see us again soon!

Hardware Store
100 Main Street
Somewhere, WA 12345
(555) 555-5555

CASH SALE

ITEM	QTY	SALE/REG	EXT
00001234	1.00	300.00	300.00
None			

Desc 1 → Gas Barbeque
Desc 2 → Patio grill with rotisserie
Autotext → We've got all your BBQ grilling accessories -- just ask!

SUBTOTAL \$ 300.00
TAX \$ 25.50
TOTAL \$ 325.50

CASH 325.50

EMPLOYEE	TERM	INVR	TIME	DATE
12	160783	11:35	27-Mar-17	

Trailer By-Line 1 → Your receipt guarantees
Trailer By-Line 2 → your hassle-free return.

WE KNOW YOU HAVE CHOICES
THANK-YOU
FOR MAKING US ONE OF THEM!
HAVE A GREAT DAY!

Invoice/Receipt Description → **INVOICE**

Barcode

Our spring sale is coming!
March 20 - 27

QR Message 1
QR Message 2

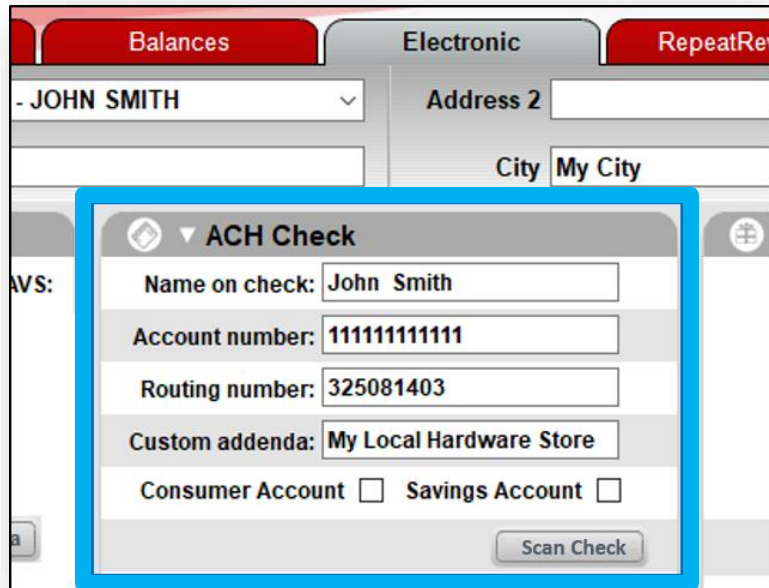
Invoice QR Code →

Scan the code for unadvertised specials for our loyal customers!

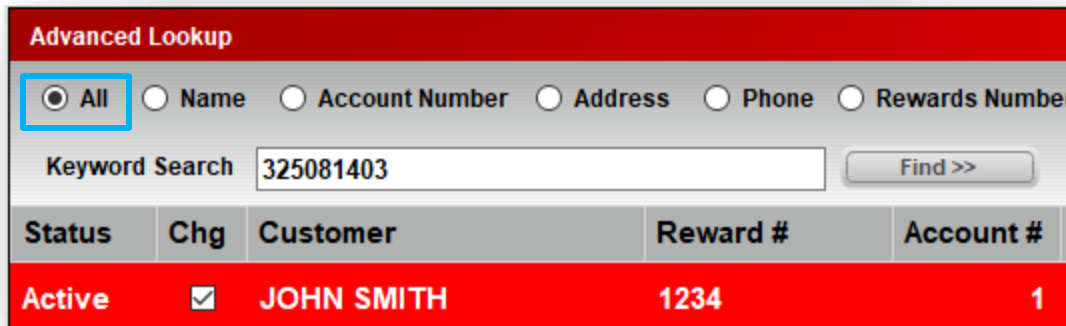
QR Message 3
QR Message 4

- 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**.

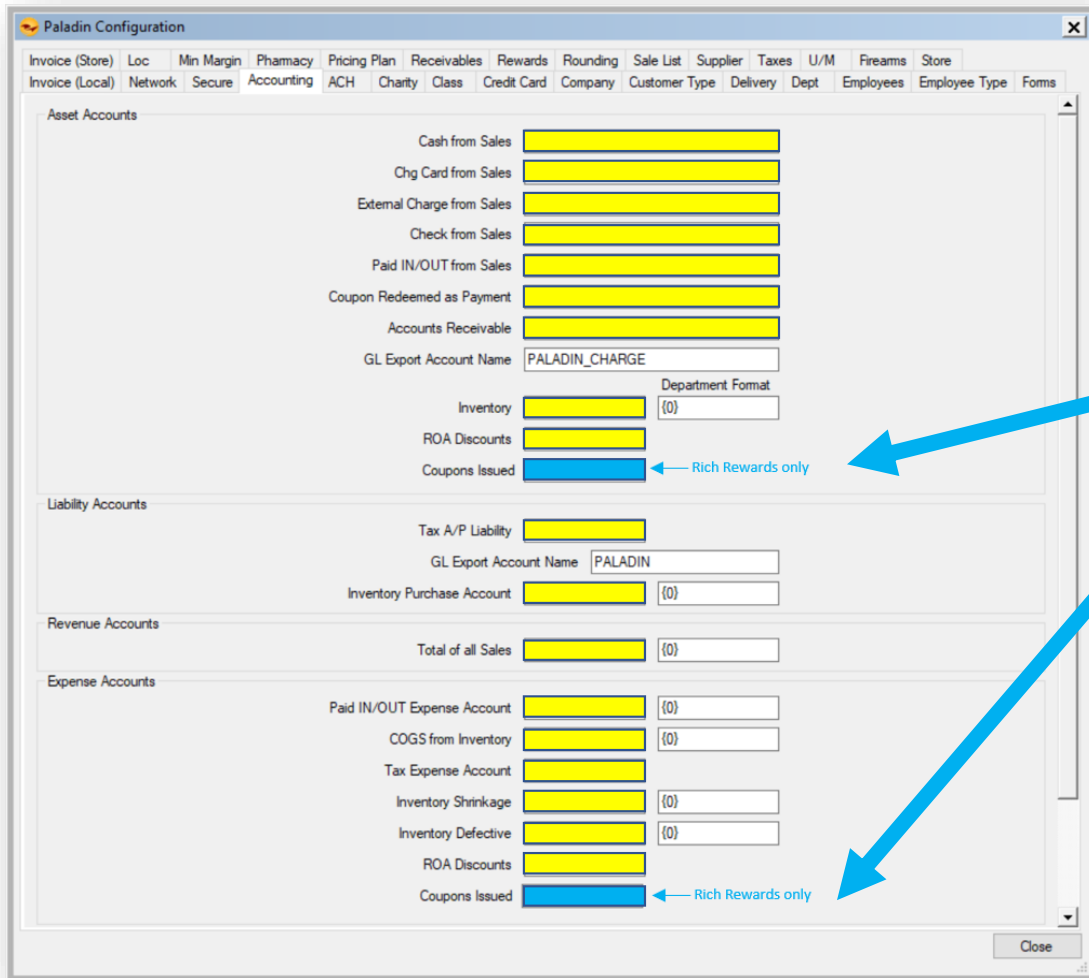
Advanced Lookup Searches Customer ACH Data

A screenshot of a software interface showing a form for 'ACH Check'. The form is highlighted with a blue border. It contains fields for 'Name on check' (John Smith), 'Account number' (11111111111), 'Routing number' (325081403), and 'Custom addenda' (My Local Hardware Store). There are also checkboxes for 'Consumer Account' and 'Savings Account', and a 'Scan Check' button at the bottom right. The background shows a partially visible 'Balances' tab and a dropdown menu with '- JOHN SMITH'.

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

A screenshot of the 'Advanced Lookup' window. It has a red header bar with the title 'Advanced Lookup'. Below the header, there are radio buttons for search categories: 'All' (selected), 'Name', 'Account Number', 'Address', 'Phone', and 'Rewards Number'. A 'Keyword Search' field contains '325081403' and a 'Find >>' button. Below this is a table with columns: 'Status', 'Chg', 'Customer', 'Reward #', and 'Account #'. The table has one row with the following data: 'Active', a checked checkbox, 'JOHN SMITH', '1234', and '1'.

GL Summary: New Categories for Rich Rewards



Paladin Configuration

Invoice (Store) Loc Min Margin Pharmacy Pricing Plan Receivables Rewards Rounding Sale List Supplier Taxes U/M Firearms Store
Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Delivery Dept Employees Employee Type Forms

Asset Accounts

Cash from Sales

Chg Card from Sales

External Charge from Sales

Check from Sales

Paid IN/OUT from Sales

Coupon Redeemed as Payment

Accounts Receivable

GL Export Account Name PALADIN_CHARGE

Inventory Department Format {0}

ROA Discounts

Coupons Issued ← Rich Rewards only

Liability Accounts

Tax A/P Liability

GL Export Account Name PALADIN

Inventory Purchase Account {0}

Revenue Accounts

Total of all Sales {0}

Expense Accounts

Paid IN/OUT Expense Account {0}

COGS from Inventory {0}

Tax Expense Account

Inventory Shrinkage {0}

Inventory Defective {0}

ROA Discounts

Coupons Issued ← Rich Rewards only

Close

- 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

GL Summary: New Categories for Rich Rewards

Paladin POS Data Viewer

Purchase Orders Rewards Settings United Market Promo

Accounting Uploads ACH Review Customer A/R Customers Discounts EDI GL Summary IME

Date Range: Thursday, April 1, 2021 to: Wednesday, April 28, 2021

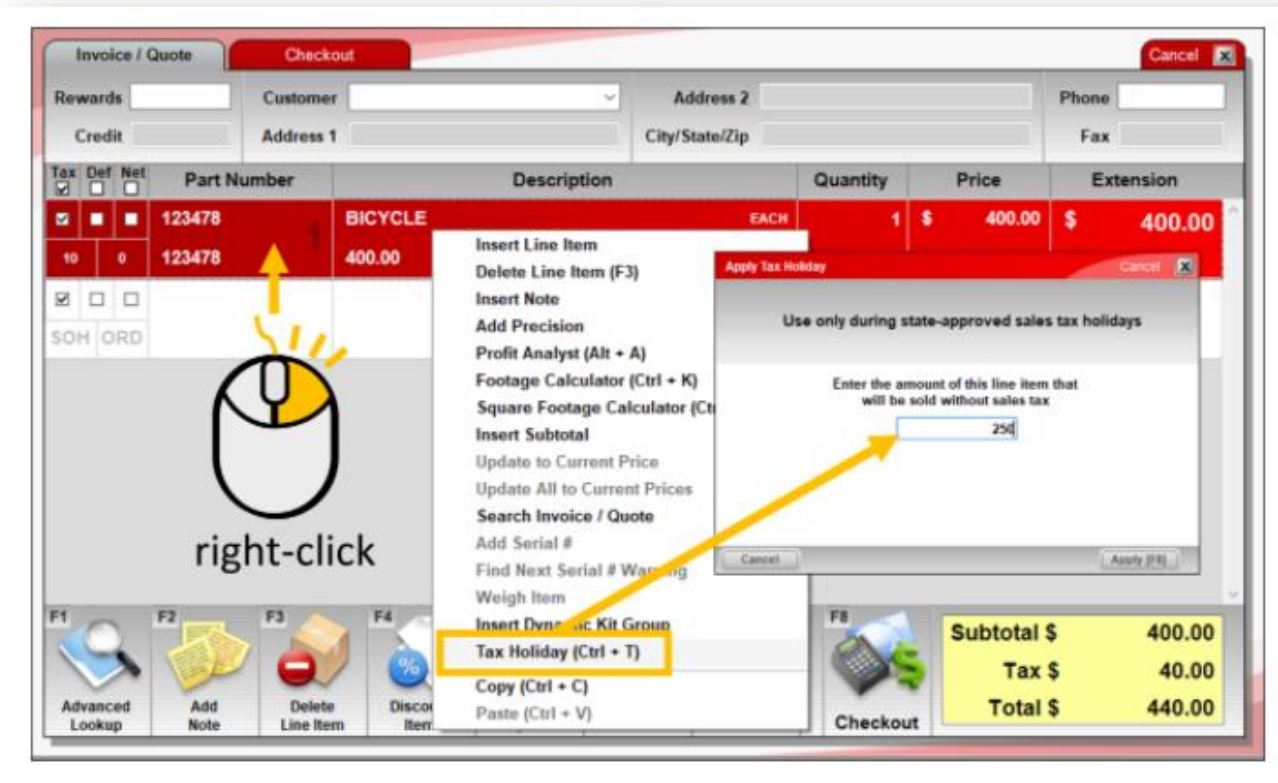
Totals Balance

GL_AccountNumber	AccountDescription	DR	CR
	Cash	1,245.79	
	Charge Card		
	Check		
	External Charge		
	Paid Out	8.00	
	Coupons Redeemed		
	Paid Out Exp Act		8.00
	Revenue		11,681.28
	Accounts Receivable	11,001.99	
	Accounts Receivable		566.50
	COGS Inventory	4,797.42	
	Inventory Asset		4,797.42
	Tax Expense Act	339.60	
	Tax A/P Liability Act		339.60
	ROA Discounts - Expense	5.00	
	ROA Discounts - Asset		5.00
	Inventory Asset - Received	30.00	
	Inventory Purchased		30.00
	Inventory Shrinkage		
	Inventory Asset - Shrinkage		
	Inventory Defective		
	Inventory Asset - Defective		
	Coupons Issued - Expense		
	Coupons Issued - Asset		
	Total	17,427.80	17,427.80

- Categories also appear in **GL Summary** tool
- **Maintain > Data Viewer > GL Summary**
- **Coupons Issued - Expense**
- **Coupons Issued - Asset**

Newly released

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.

Simplified Tax Holiday Sales and Accounting

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"/>	123478	BICYCLE	1	\$ 400.00	\$ 400.00
10	0	0	123478	400.00			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TAX HOLIDAY 1	TAX HOLIDAY 1 (Credit SKU)	-1	\$ 250.00	\$ -250.00
0	0	0					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TAX HOLIDAY 2	TAX HOLIDAY 2 (Nontaxable SKU)	1	\$ 250.00	\$ 250.00
0	0	0					

The **Tax Holiday 1** and **Tax Holiday 2** line items work together to adjust the sales tax while preserving the sale price.

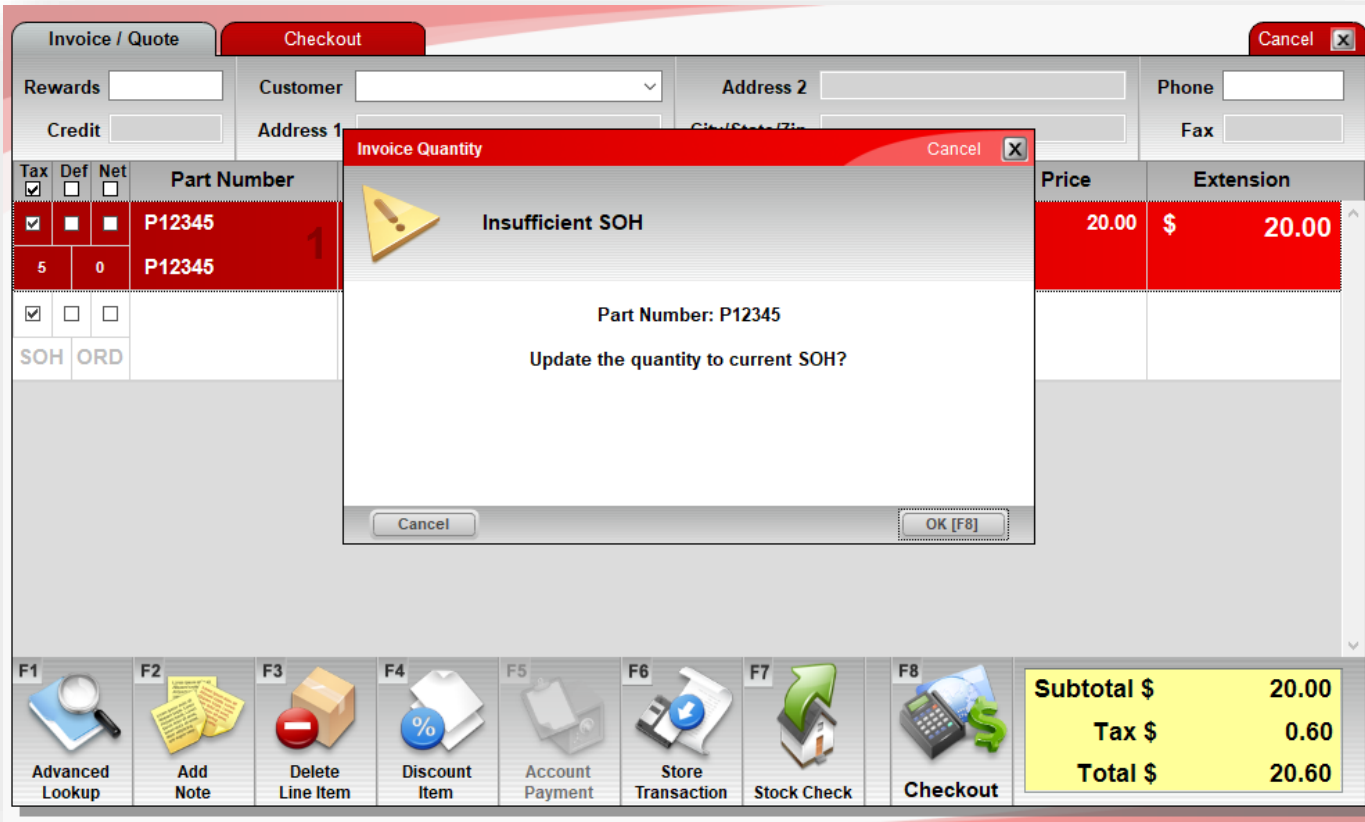
F1 F2 F3 F4 F5 F6 F7 F8

Advanced Lookup Add Note Delete Line Item Discount Item Account Payment Store Transaction Stock Check Checkout

Subtotal \$	400.00
Tax \$	15.00
Total \$	415.00

- After you enter the tax holiday amount, two line items appear to adjust the sales tax while preserving the sale price.
- Tax holiday amounts are tracked the Comparative Revenue Report and the Sale Tax Details Report.
- Turned on automatically when you receive 2021-C build

Insufficient SOH (Oversold) Alert



The screenshot shows the 'Invoice / Quote' module in 'Checkout' mode. A red alert box titled 'Invoice Quantity' is displayed over the main window. The alert contains a yellow warning triangle icon and the text: 'Insufficient SOH', 'Part Number: P12345', and 'Update the quantity to current SOH?'. The alert has 'Cancel' and 'OK [F8]' buttons.

The background window shows the 'Checkout' screen with the following details:

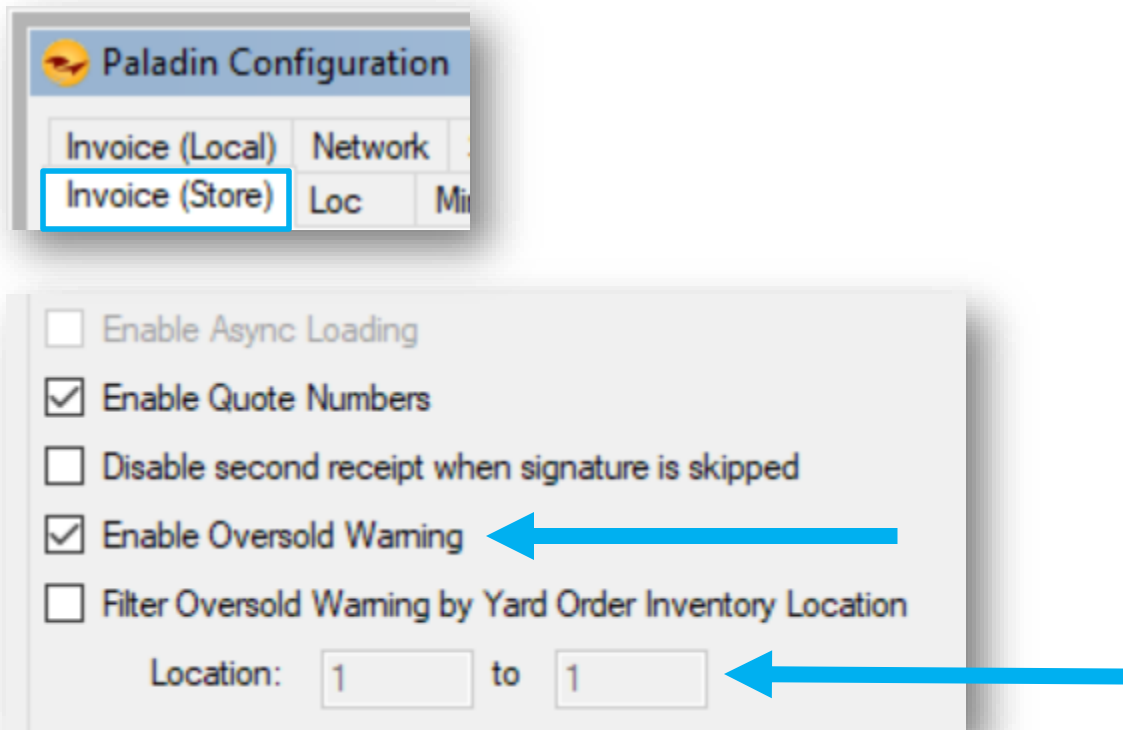
- Header:** Invoice / Quote, Checkout, Cancel
- Form Fields:** Rewards, Credit, Customer, Address 1, Address 2, City/State/Zip, Phone, Fax.
- Table:**

Tax	Def	Net	Part Number	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P12345	20.00	\$ 20.00
5	0		P12345		
- Footer:** SOH, ORD, F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Discount Item, F5 Account Payment, F6 Store Transaction, F7 Stock Check, F8 Checkout.
- Summary:**

Subtotal \$	20.00
Tax \$	0.60
Total \$	20.60

- 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.

Turn on Insufficient SOH (Oversold) Alert



Paladin Configuration

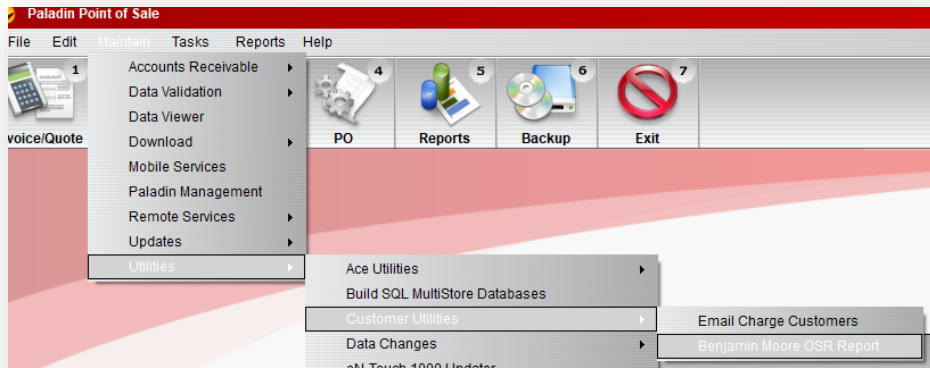
Invoice (Local) Network
Invoice (Store) Loc Min

☐ Enable Async Loading
☒ Enable Quote Numbers
☐ Disable second receipt when signature is skipped
☒ Enable Oversold Warning
☐ Filter Oversold Warning by Yard Order Inventory Location

Location: 1 to 1

- To turn on oversold warning:
 1. Go to **File** menu > **Setup** > **Invoice (Store)** tab.
 2. Select **Enable Oversold Warning**.
 3. Optional: Select **Filter Oversold Warning by Yard Order Inventory Location** and enter a **Location** range.
 4. Click **Save**.

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.

Benjamin Moore OSR Report [Cancel] [X]

Enter Parameters and Click OK to Create Excel Report File

From Date: Monday, June 28, 2021 To Date: Tuesday, July 6, 2021

OSR Number: 2222

OSR Associated Customer Type: OSR Mary Owen

Benjamin Moore Supplier Number: 99

Benjamin Moore Account Number: 1212

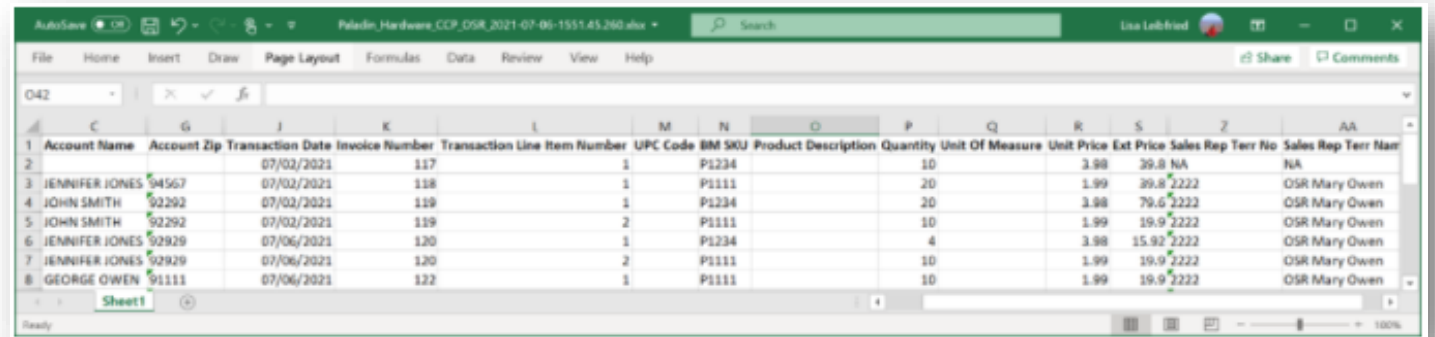
Include:

☐ OSR Only

☐ CCP Only

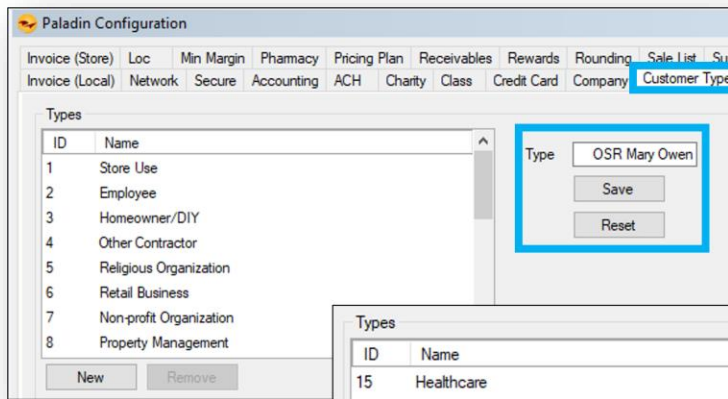
☒ OSR and CCP

[Cancel] [OK]

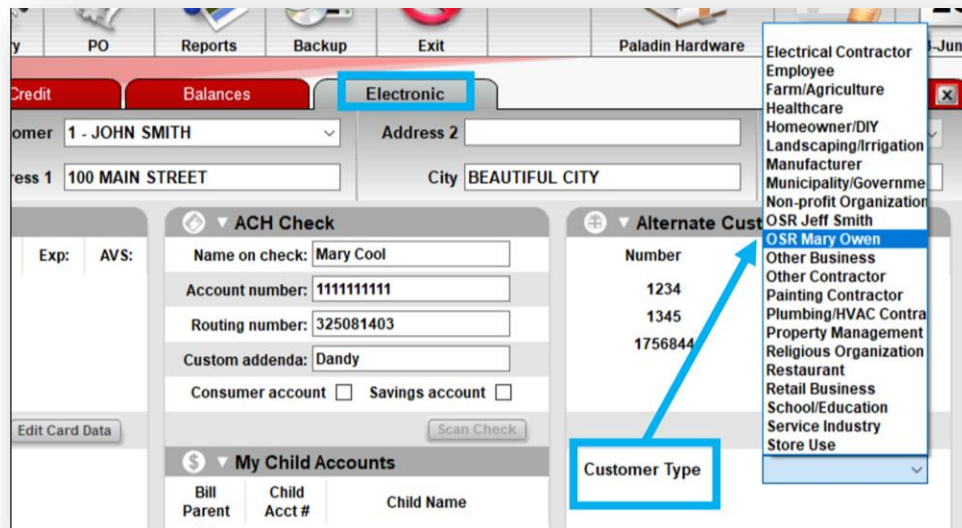


	Account Name	Account Zip	Transaction Date	Invoice Number	Transaction Line Item Number	UPC Code	BM SKU	Product Description	Quantity	Unit Of Measure	Unit Price	Ext Price	Sales Rep Terr No	Sales Rep Terr Name
1			07/02/2021	117	1	P1234			10		3.98	39.8	2222	NA
2	JENNIFER JONES	94567	07/02/2021	118	1	P1111			20		1.99	39.8	2222	OSR Mary Owen
3	JOHN SMITH	92292	07/02/2021	119	1	P1234			20		3.98	79.6	2222	OSR Mary Owen
4	JOHN SMITH	92292	07/02/2021	119	2	P1111			10		1.99	19.9	2222	OSR Mary Owen
5	JENNIFER JONES	92929	07/06/2021	120	1	P1234			4		3.98	15.92	2222	OSR Mary Owen
6	JENNIFER JONES	92929	07/06/2021	120	2	P1111			10		1.99	19.9	2222	OSR Mary Owen
7	GEORGE OWEN	91111	07/06/2021	122	1	P1111			10		1.99	19.9	2222	OSR Mary Owen


Benjamin Moore Program Reports - Setup



- Setup required for OSR reports:
 - Add Customer Types for OSR reps.
 - **File > Setup > Customer Types** tab.
 - Select the OSR rep for their customers in Paladin.
 - Not available for stores that use Ace Rewards.
- No set up for CCP reports.




New Item and Bin Tags



ITEM TAG 18
2-1/4" x 3/4"
Custom adhesive barbell label.

LASER	DESKTOP	PORTABLE
N/A	Custom	N/A

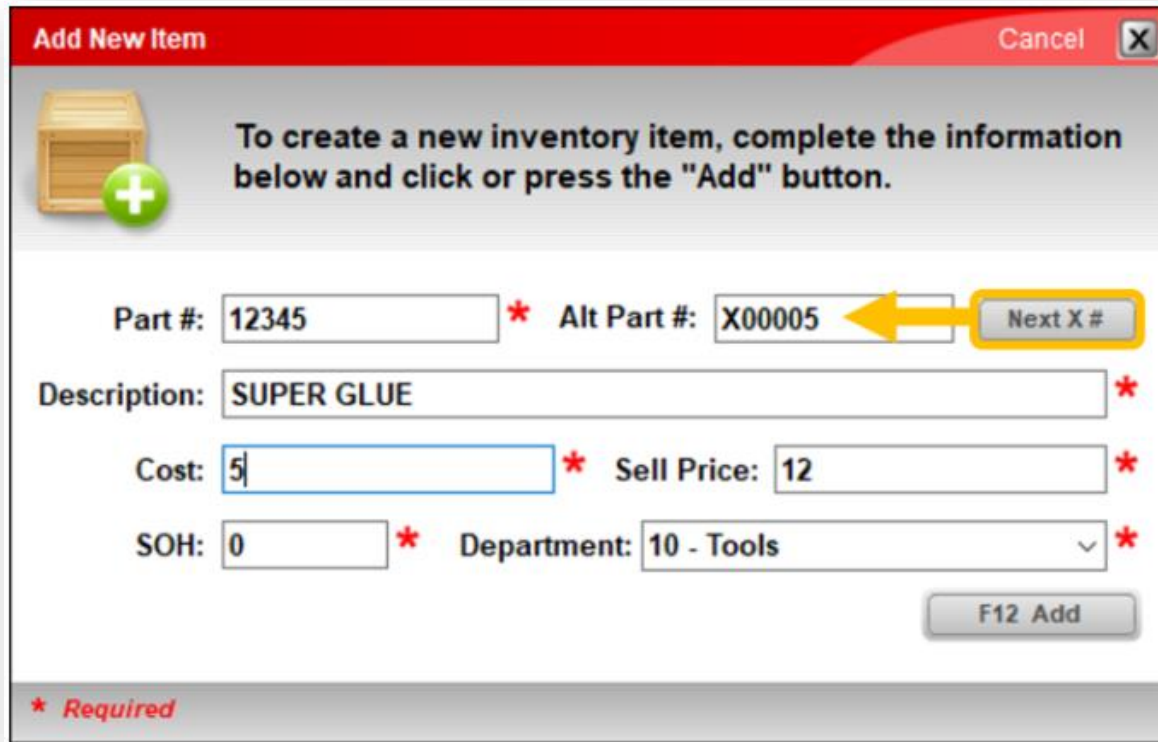


BIN TAG 41
2" x 1"
Adhesive label. Prints on label stock.
Barcode 128 containing part number.


LASER	DESKTOP	PORTABLE
N/A	<ul style="list-style-type: none"> ● BNTDY ○ BNTDG ○ BNTDW ● BNTDR 	N/A

- New Bin Tag #41 and 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



Add New Item [Cancel] [X]

 To create a new inventory item, complete the information below and click or press the "Add" button.

Part #: 12345 * Alt Part #: X00005 ← Next X #

Description: SUPER GLUE *

Cost: 5 * Sell Price: 12 *

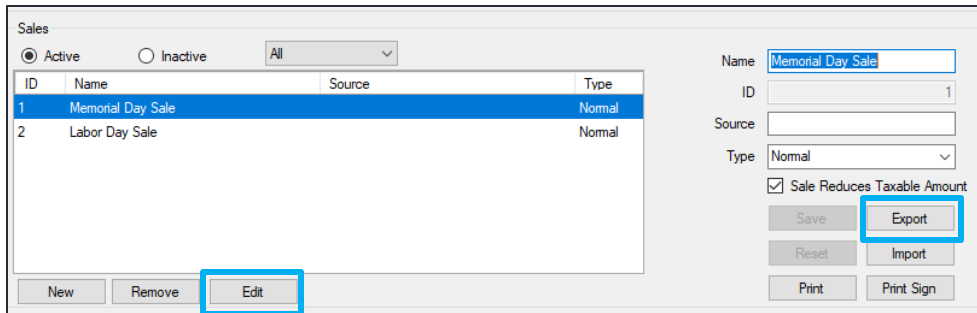
SOH: 0 * Department: 10 - Tools *

F12 Add

* Required

- 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



Sales

☒ Active ☐ Inactive All

ID	Name	Source	Type
1	Memorial Day Sale		Normal
2	Labor Day Sale		Normal

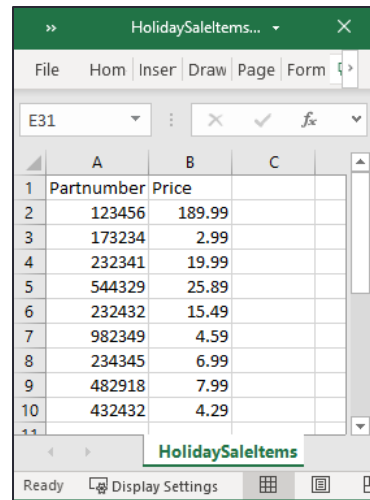
Name:

ID:

Source:

Type: Normal

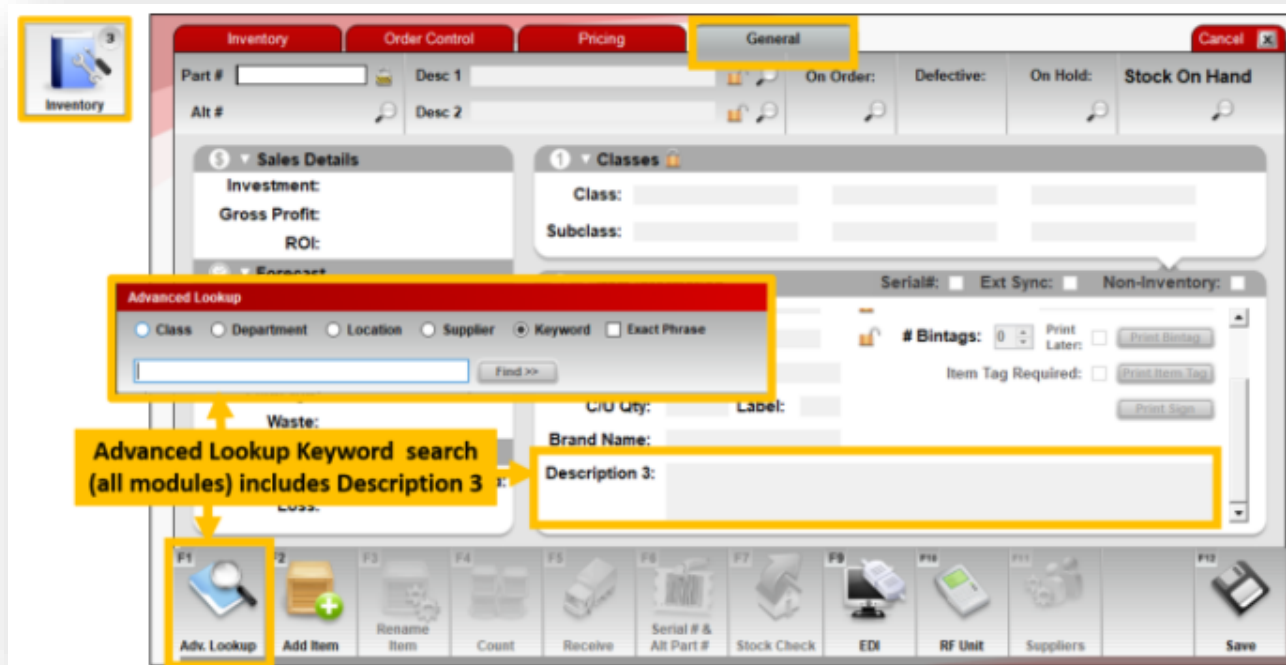
☒ Sale Reduces Taxable Amount



	A	B	C
1	Partnumber	Price	
2	123456	189.99	
3	173234	2.99	
4	232341	19.99	
5	544329	25.89	
6	232432	15.49	
7	982349	4.59	
8	234345	6.99	
9	482918	7.99	
10	432432	4.29	

- 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**.

Description 3 Now in Advanced Lookup Keyword Search



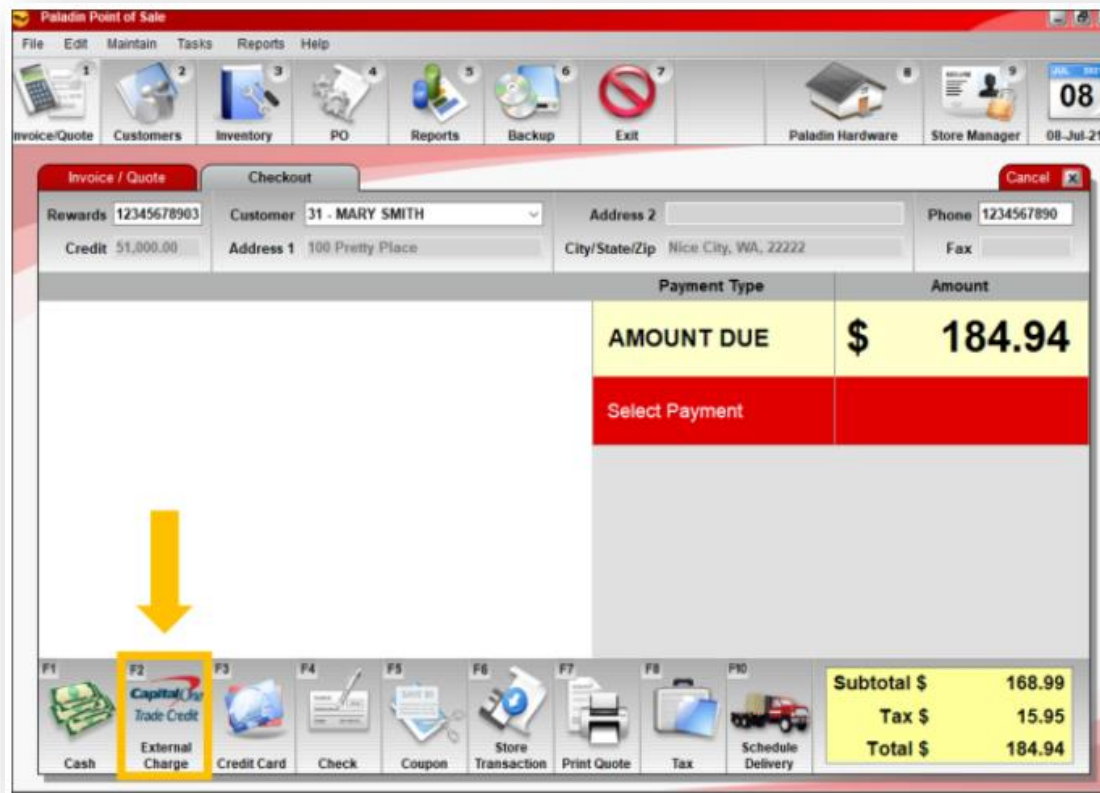
- The **Advanced Lookup** [F1] feature will now search Description 3 when you perform a **Keyword** (default) search.
- The Description 3 field is found in the **Inventory** module on the **General** tab for each inventory item. This product description has a large character limit and is typically used to provide a long description of an item for webstore integrations, such as [Volusion](https://www.volusion.com).

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.

Learn more

[Paladin 2021-A Release Guide](#)

[Paladin 2021-B Release Guide](#)

[Paladin 2021-C Release Guide](#)

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

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

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

Next webinar:

Tips & Tricks: Bin Tags

September 14 @ 9am PT

Register: portal.paladinpos.com/webinars



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