



# Virtual User Meeting – February 2021

**ORGILL**

Charles Owen

*Chief Experience Officer*

February 16, 2021

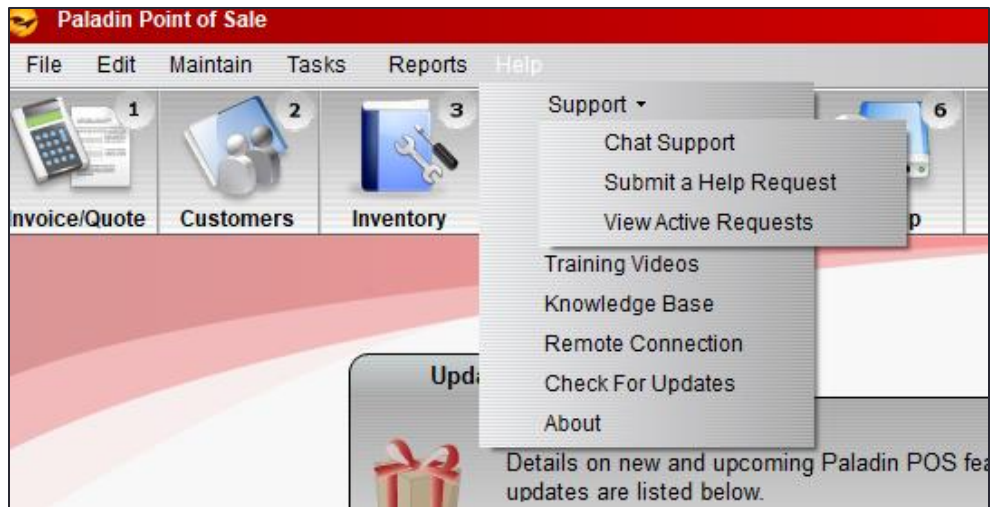
## ***WHAT YOU'LL LEARN***

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 you can use now
- New point of sale features coming soon

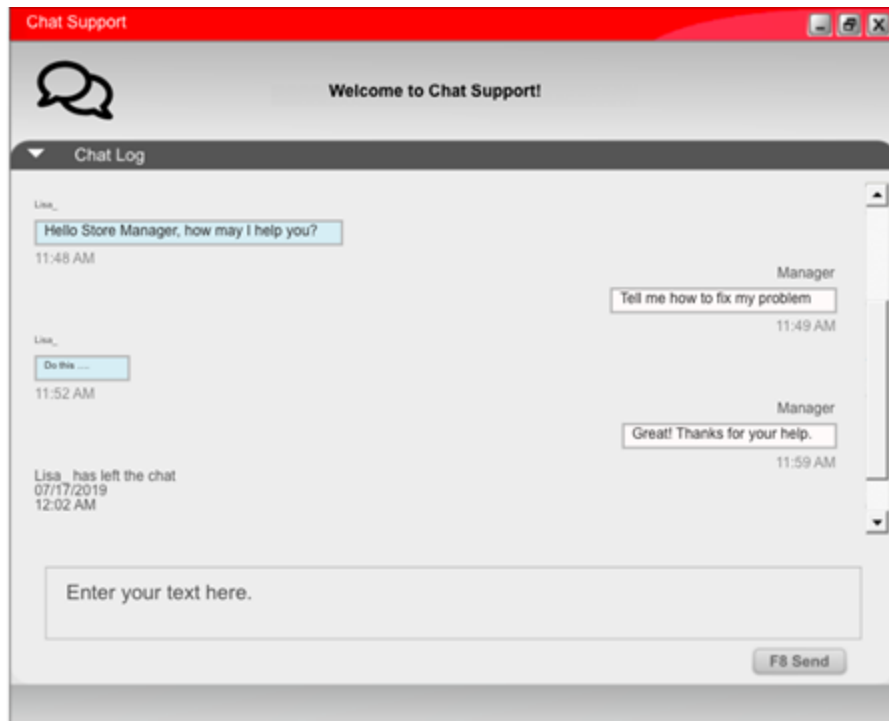
# A New Help Request Portal

## The new Help menu category: “Support”



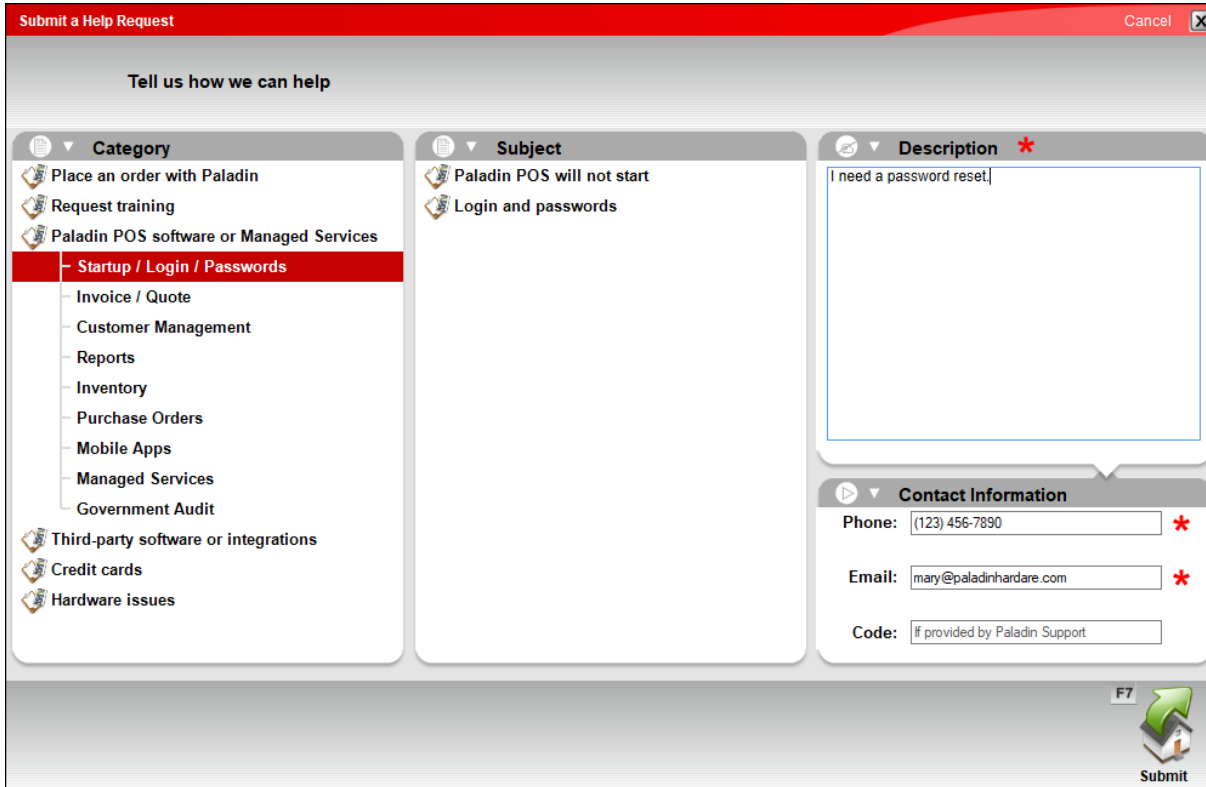
- A new **Support** category on the **Help** menu provides access to multiple support features:
  - **Chat Support** gets you immediate help and quick answers to simple questions.
  - **Submit a Help Request** lets you request help for more complex issues or when Chat Support is not available. This menu 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 PM PST, 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, it says "Tell us how we can help". The form is divided into three main sections: "Category", "Subject", and "Description".

- Category:** A list of categories 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 with "Paladin POS will not start" and "Login and passwords" selected. Other subjects include "Paladin POS software or Managed Services".
- Description:** A text area containing the text "I need a password reset".

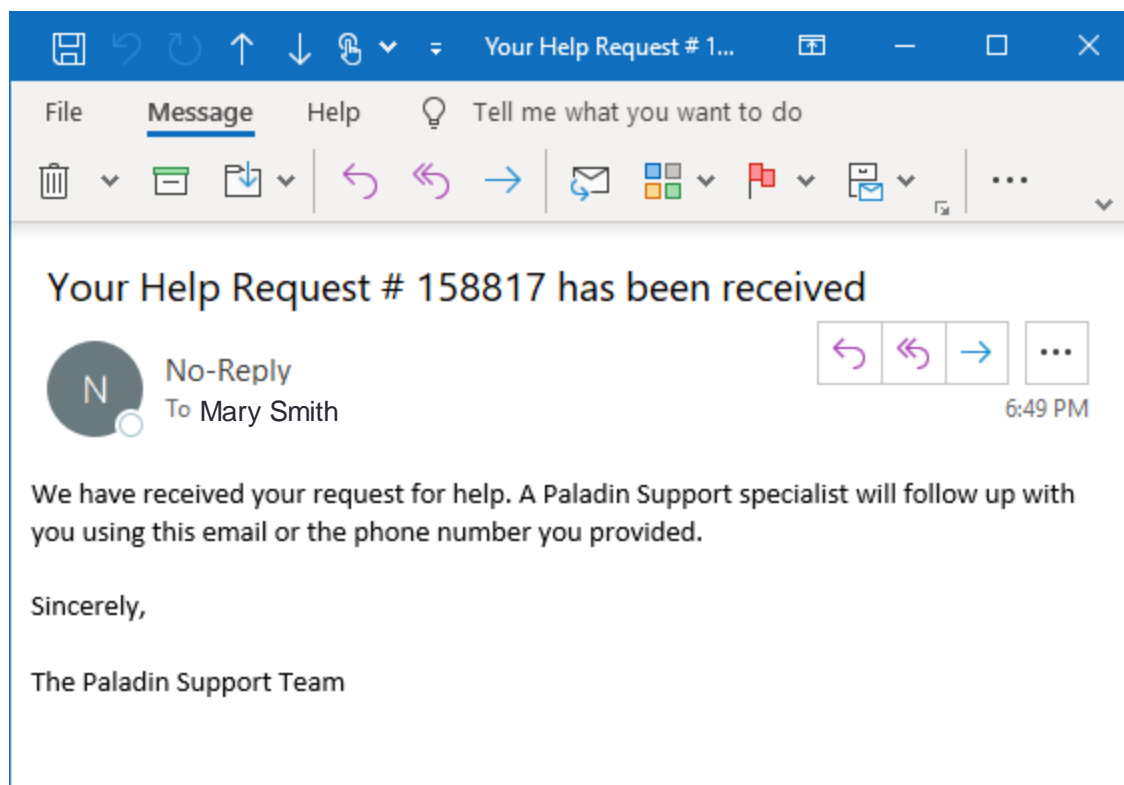
Below the description is a "Contact Information" section with three fields:

- Phone:** (123) 456-7890
- Email:** mary@paladinhardare.com
- Code:** If provided by Paladin Support

At the bottom right, there 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.

## The 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



**FASTBOUND**  
FIREARMS COMPLIANCE SOFTWARE

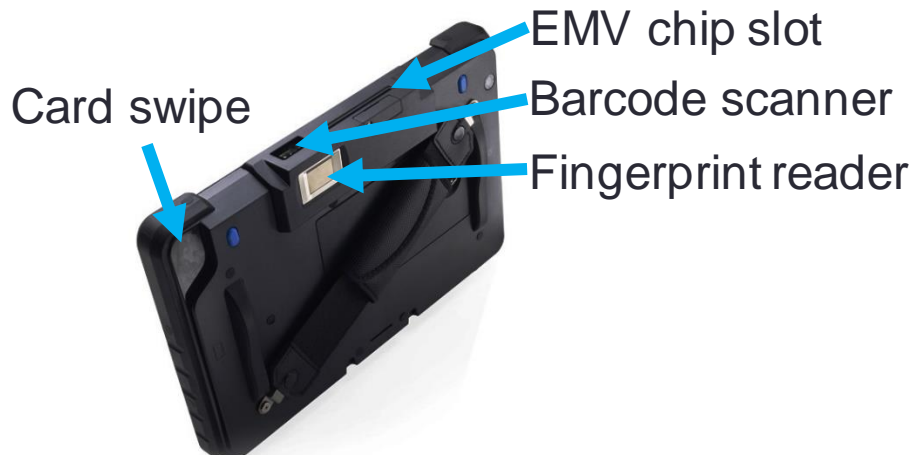
- Simplify the complicated process of selling firearms with the FastBound integration.
- Guaranteed compliance for firearm acquisition and disposition (A&D), an electronic 4473, and an electronic bound book with FastBound's FFL software.
- Receive and sell firearms in Paladin while simultaneously updating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

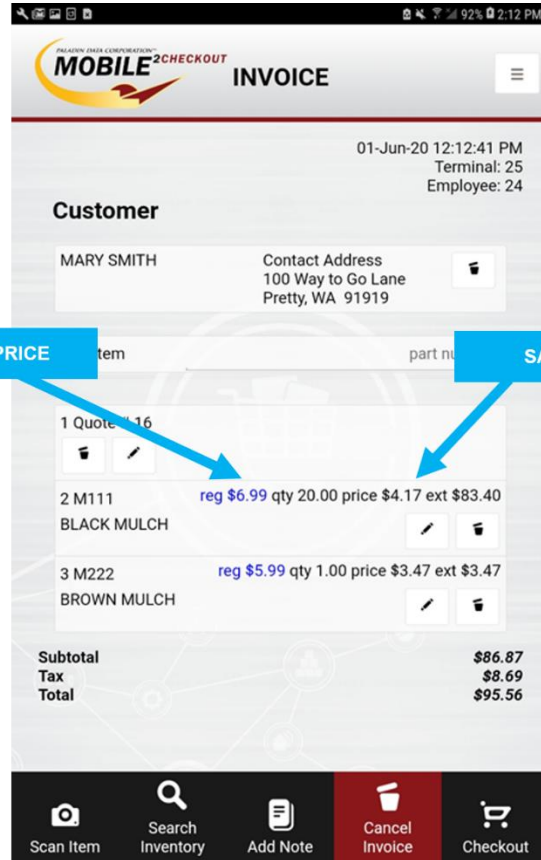
- Take the power of Paladin with you anywhere on your business network with this agile 10-inch Windows tablet.
- Use all Paladin features including inventory management, EDI, purchase orders, pricing plans/sale lists, quotes and customer sales.
- Barcode scanner and EMV enabled. Runs Office 365 and other 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.
- Accepts all major payment types, including touchless, and features a stylus for quick signature capture.



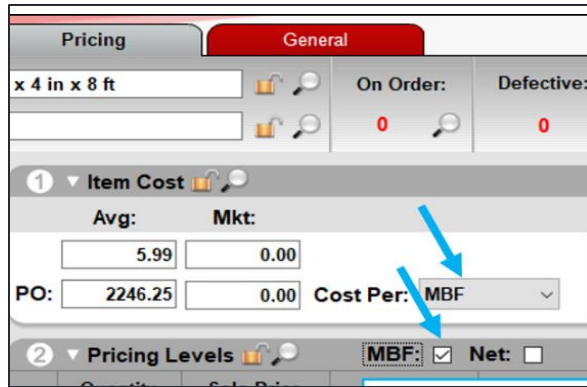
## Verifone P400 payment terminals



- 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

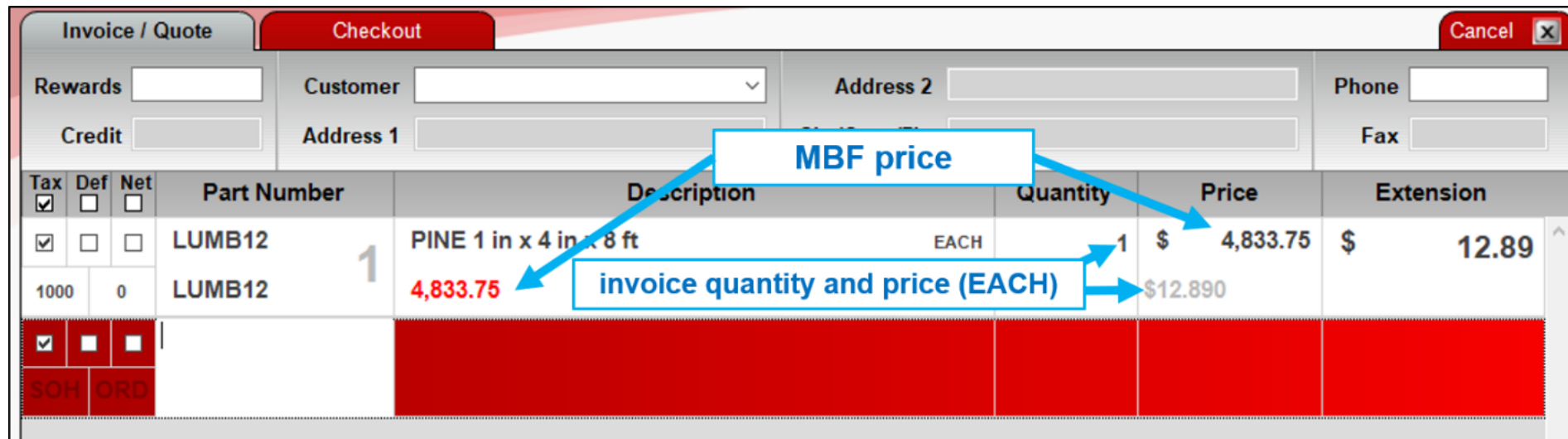
1 Item Cost

Avg: 5.99 Mkt: 0.00

PO: 2246.25 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 tons on invoices and quotes.
- To turn on, select the **MBF**, **MSF** or **TON** checkbox. (**Cost Per:** must be set to unit first.)



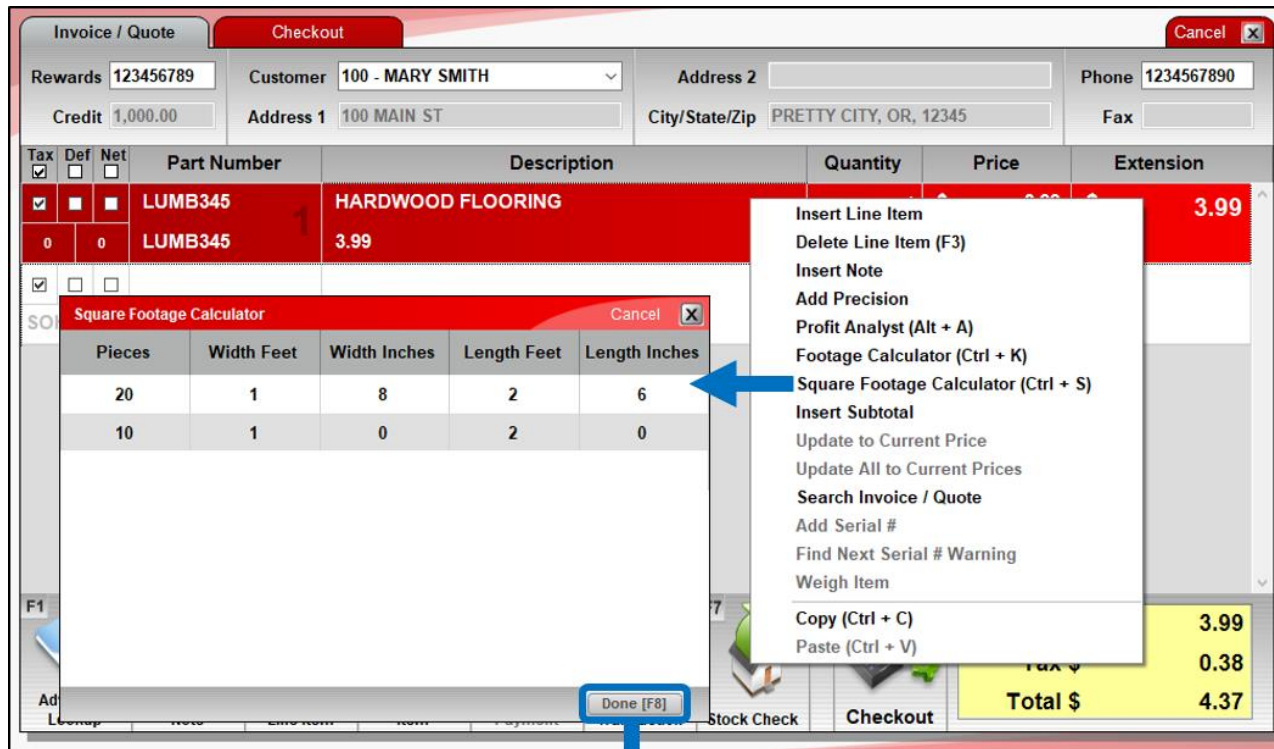
**Invoice / Quote Checkout**

Rewards: Customer: Address 2: Phone: Credit: Address 1: 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	EACH	\$ 4,833.75	\$ 12.89
1000	0		LUMB12			4,833.75	\$12.890

SOH ORD

# Square footage calculator



Invoice / Quote Checkout

Rewards: 123456789 Customer: 100 - MARY SMITH Address 2: Address 1: 100 MAIN ST City/State/Zip: PRETTY CITY, OR, 12345 Phone: 1234567890 Fax:

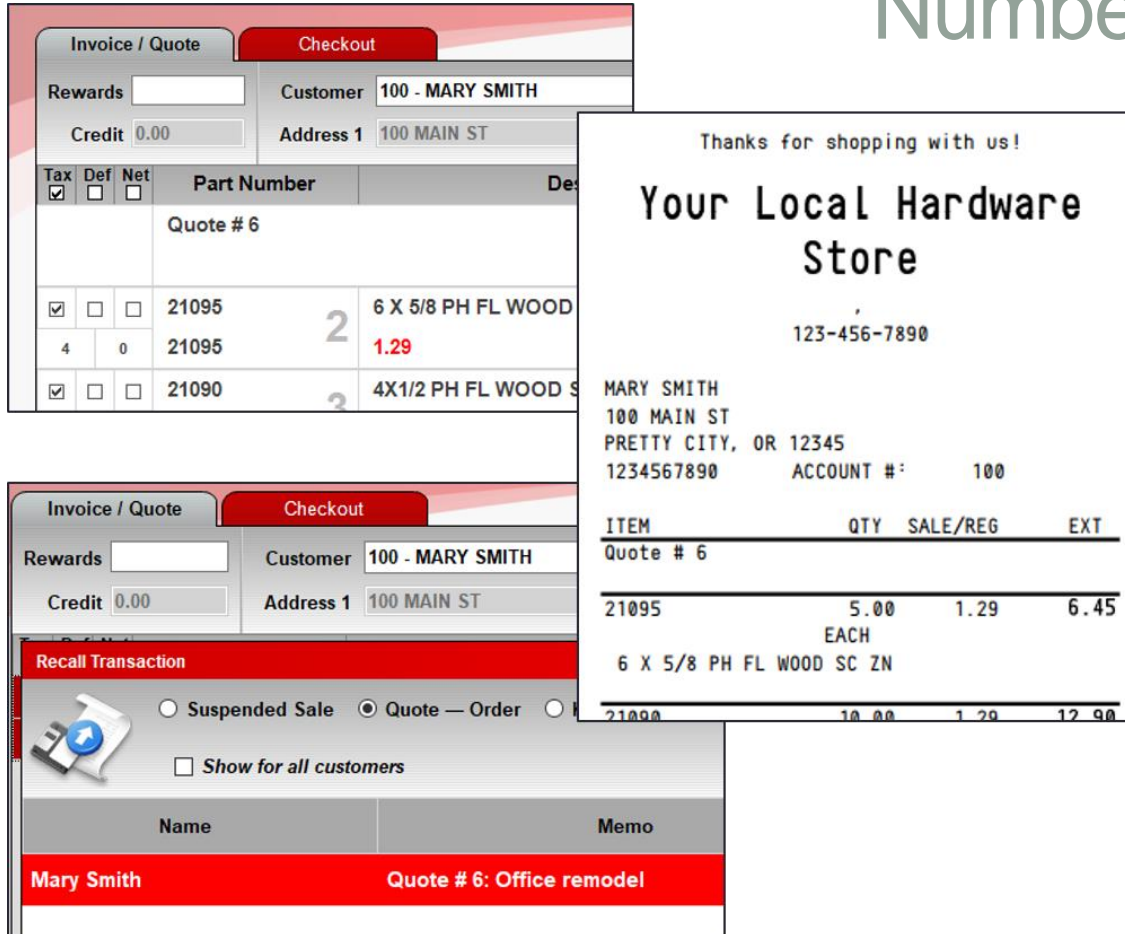
Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING		3.99	3.99
0	0	0	LUMB345	3.99			
							<b>Total \$</b> 4.37

Done [F8]

- 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     Customer 100 - MARY SMITH

Credit 0.00    Address 1 100 MAIN ST

Tax	Def	Net	Part Number	Qty	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quote # 6		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21095	2	6 X 5/8 PH FL WOOD
4	0		21095		1.29
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21090	3	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**

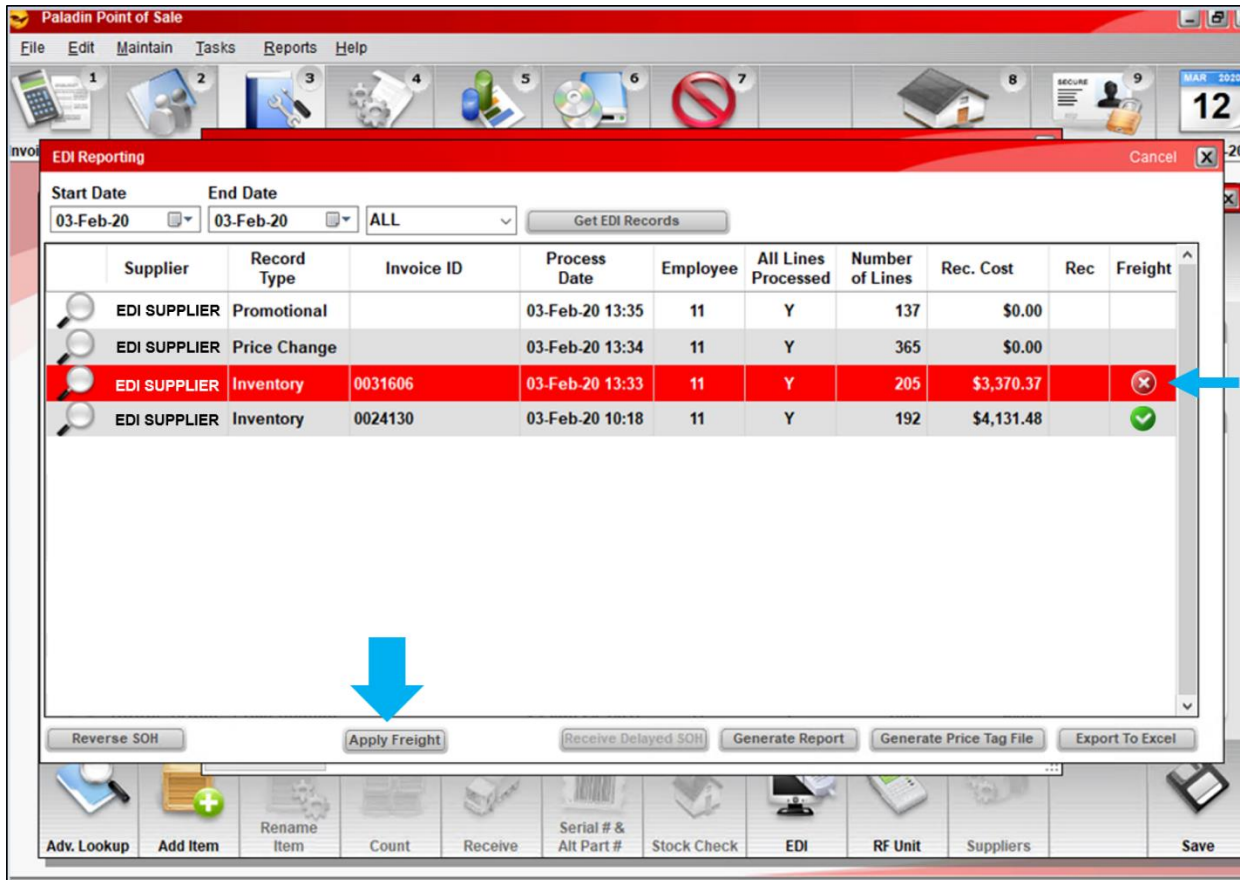
Suspended Sale     Quote — Order   

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



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 2 3 4 5 6 7 8 9

Start Date: 03-Feb-20 End Date: 03-Feb-20 ALL Get EDI Records

Supplier	Record Type	Invoice ID	Process Date	Employee	All Lines Processed	Number of Lines	Rec. Cost	Rec	Freight
EDI SUPPLIER	Promotional		03-Feb-20 13:35	11	Y	137	\$0.00		
EDI SUPPLIER	Price Change		03-Feb-20 13:34	11	Y	365	\$0.00		
EDI SUPPLIER	Inventory	0031606	03-Feb-20 13:33	11	Y	205	\$3,370.37		✘
EDI SUPPLIER	Inventory	0024130	03-Feb-20 10:18	11	Y	192	\$4,131.48		✔

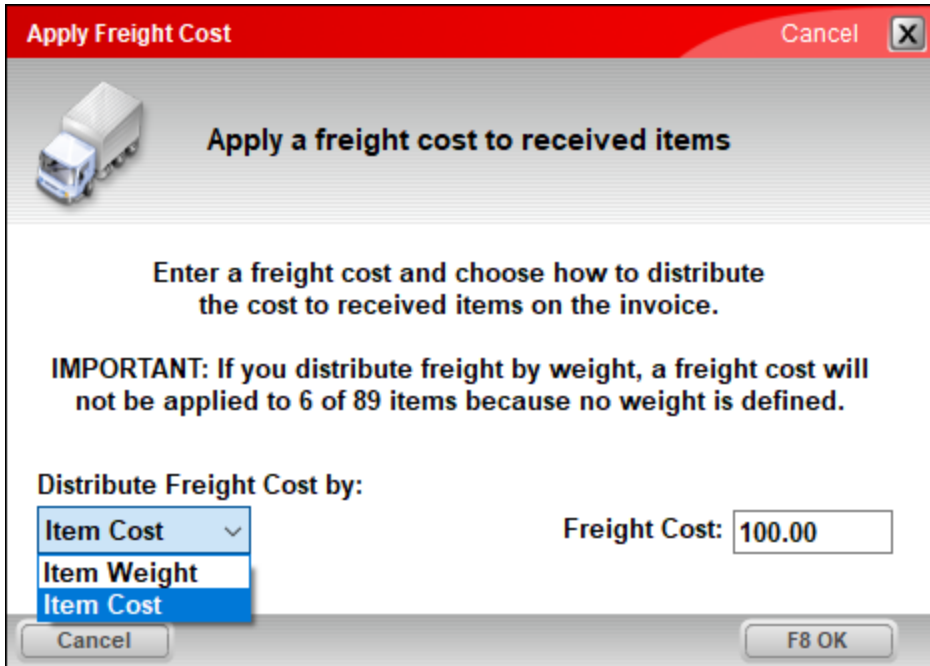
Reverse SOH Apply Freight Receive Delayed SOH Generate Report Generate Price Tag File Export To Excel

Adv. Lookup Add Item Rename Item Count Receive Serial # & Alt Part # Stock Check EDI RF Unit Suppliers Save


- 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 X

 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

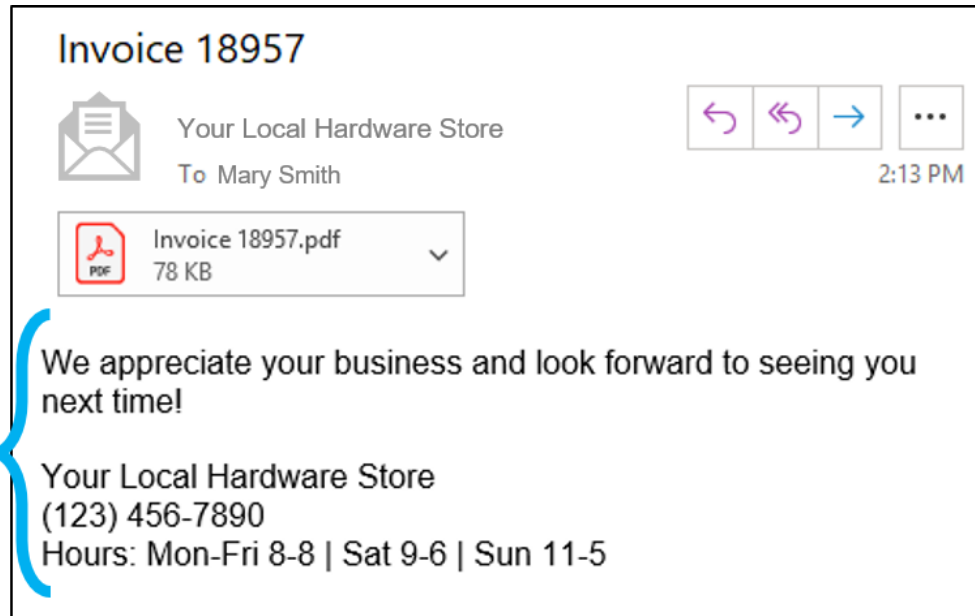
Item Cost

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

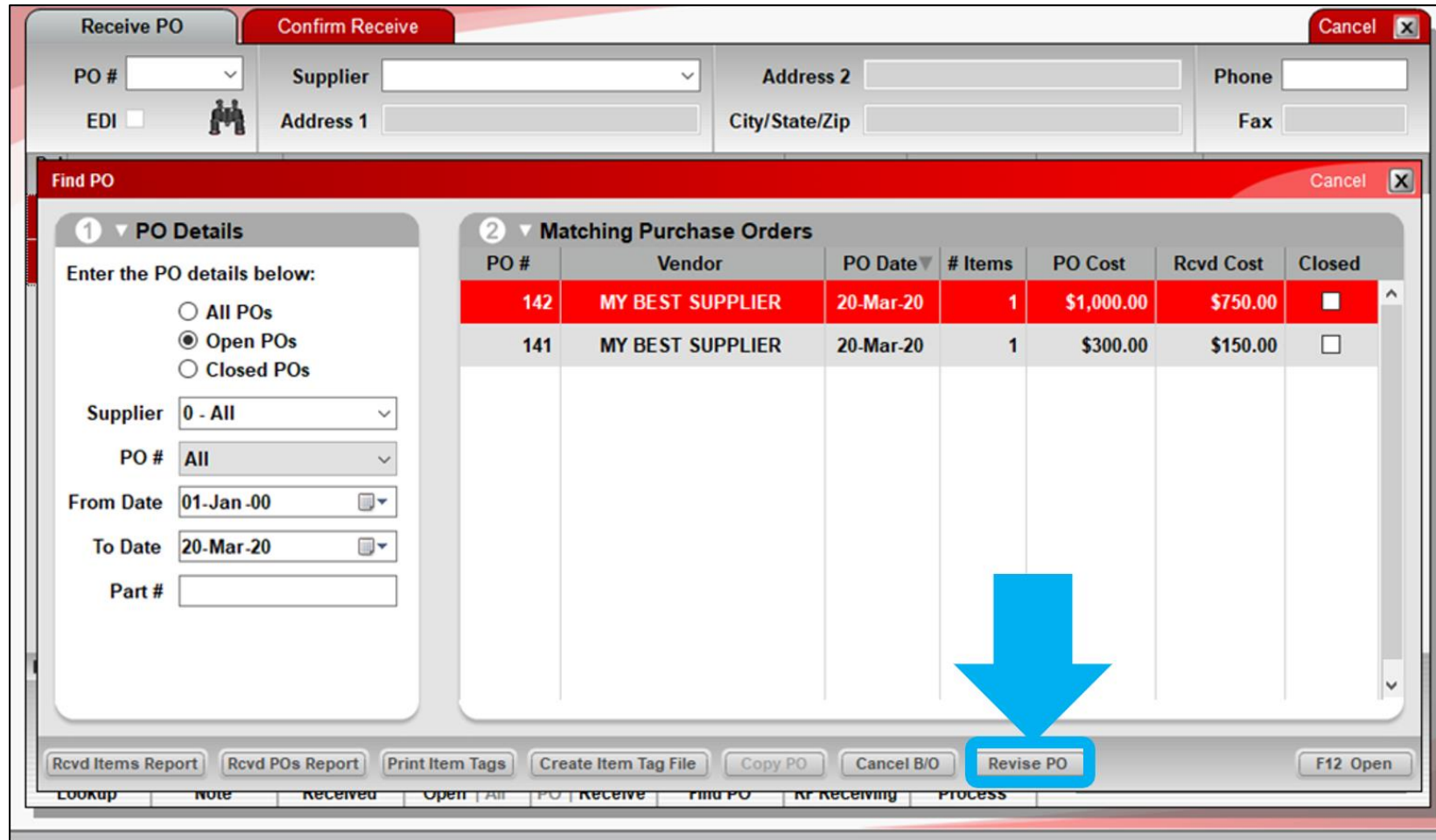


Custom  
Message

- Add custom messages, 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

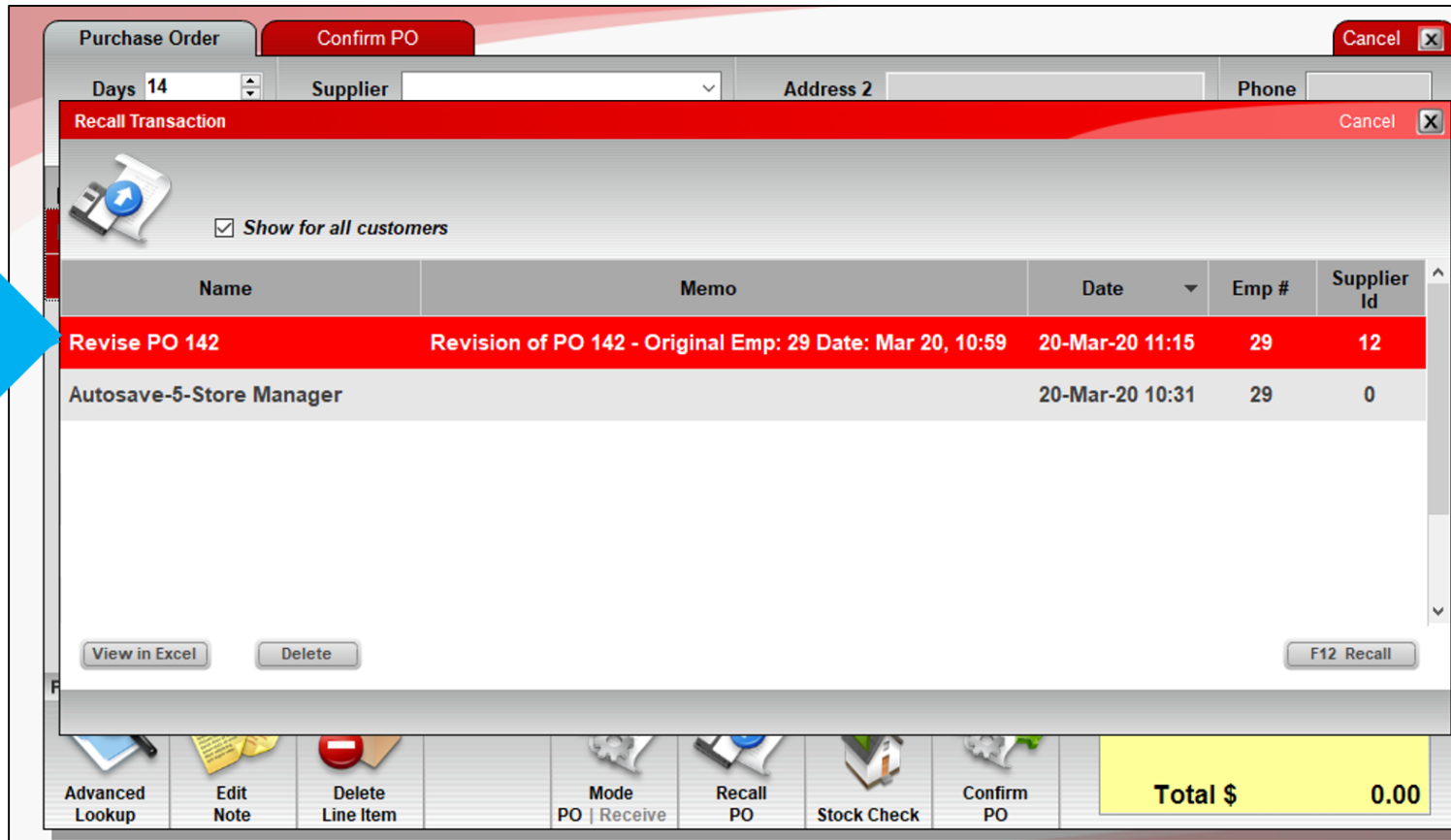


PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
142	MY BEST SUPPLIER	20-Mar-20	1	\$1,000.00	\$750.00	<input type="checkbox"/>
141	MY BEST SUPPLIER	20-Mar-20	1	\$300.00	\$150.00	<input type="checkbox"/>

- 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.

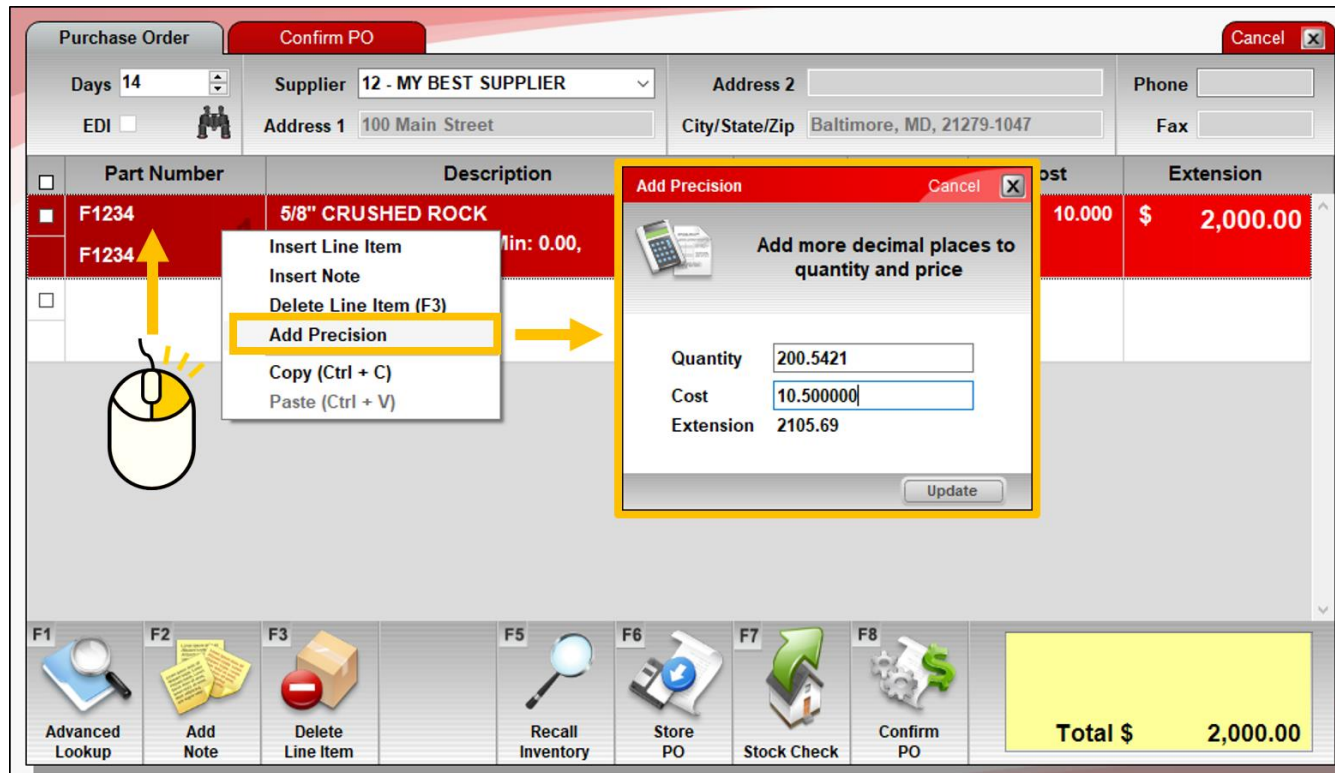


The screenshot shows a software interface for creating a purchase order. The main window is titled 'Purchase Order' and has a 'Confirm PO' button. Below the title bar, there are fields for 'Days' (set to 14), 'Supplier', 'Address 2', and 'Phone'. A 'Recall Transaction' window is open, displaying a table with the following data:

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

At the bottom of the interface, there is a toolbar with buttons for 'Advanced Lookup', 'Edit Note', 'Delete Line Item', 'Mode PO | Receive', 'Recall PO', 'Stock Check', and 'Confirm PO'. A 'Total \$' field shows '0.00'.

## Add Precision to PO quantity and price



The screenshot shows a 'Purchase Order' window with a 'Confirm PO' tab. The main table lists a line item for '5/8" CRUSHED ROCK' with a quantity of 10.000 and a cost of \$2,000.00. A right-click context menu is open over the line item, with 'Add Precision' selected. A yellow arrow points from this menu to the 'Add Precision' dialog box. The dialog box has fields for 'Quantity' (200.5421), 'Cost' (10.500000), and 'Extension' (2105.69). A yellow mouse cursor icon is also present near the 'Add Precision' menu item.

Part Number	Description	Quantity	Cost	Extension
F1234	5/8" CRUSHED ROCK	10.000	\$ 2,000.00	

**Add Precision** dialog box fields:

- Quantity: 200.5421
- Cost: 10.500000
- Extension: 2105.69

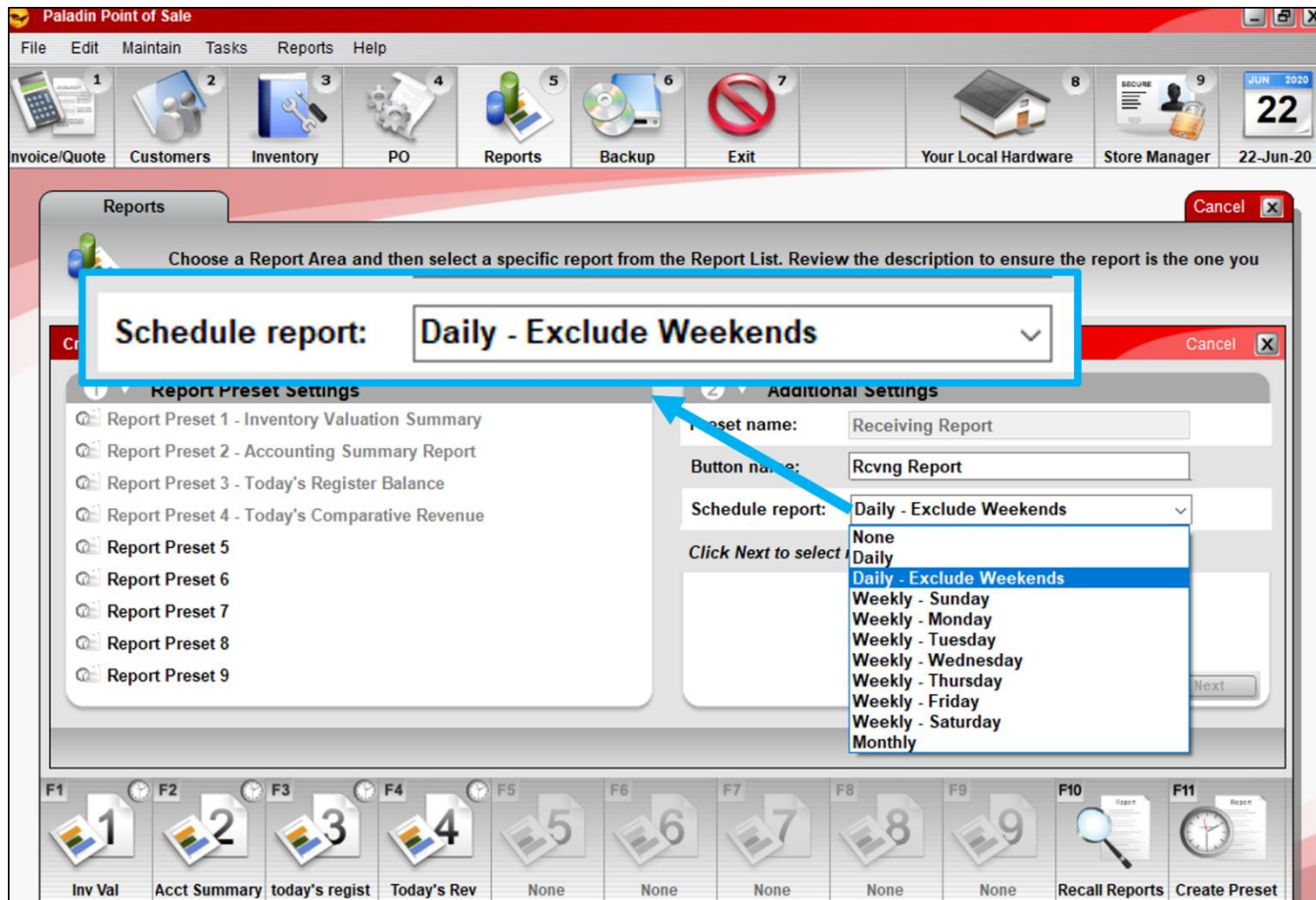
Quick Access menu (F1-F8):

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

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	<input type="radio"/> Terminal <input checked="" type="radio"/> Employee	
Export to Excel?	<input checked="" type="checkbox"/>	



AutoSave Off Book2 - Excel

File Home Insert Draw Page La Formula 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

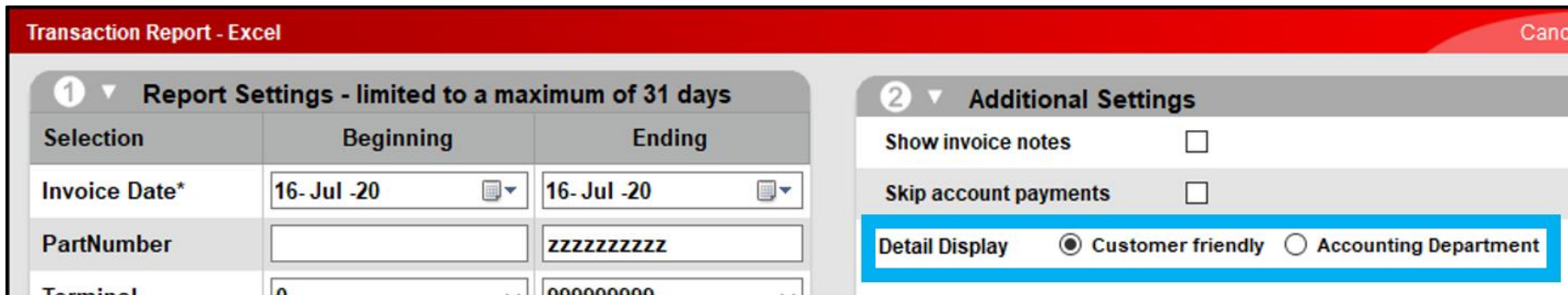
Report Settings All Employees Employee 2 Employee 3 Card Type Details ...

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

Skip account payments

Detail Display  Customer friendly  Accounting Department

# Automatically exclude special orders from rewards



**SPECIAL ORDER**

Your Local Hardware Store  
123-456-7890

INVOICE #	0
ACCOUNT #	100
DATE	21-Jul-20
TIME	13:53
EMPLOYEE	29 - Store M.
TERMINAL	7
PAGE #	1

**SOLD TO:**  
(123) 456-7890  
MARY SMITH  
100 MAIN ST  
PRETTY CITY 12345

**SHIP TO:**  
MARY SMITH  
100 MAIN ST  
PRETTY CITY 12345

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.



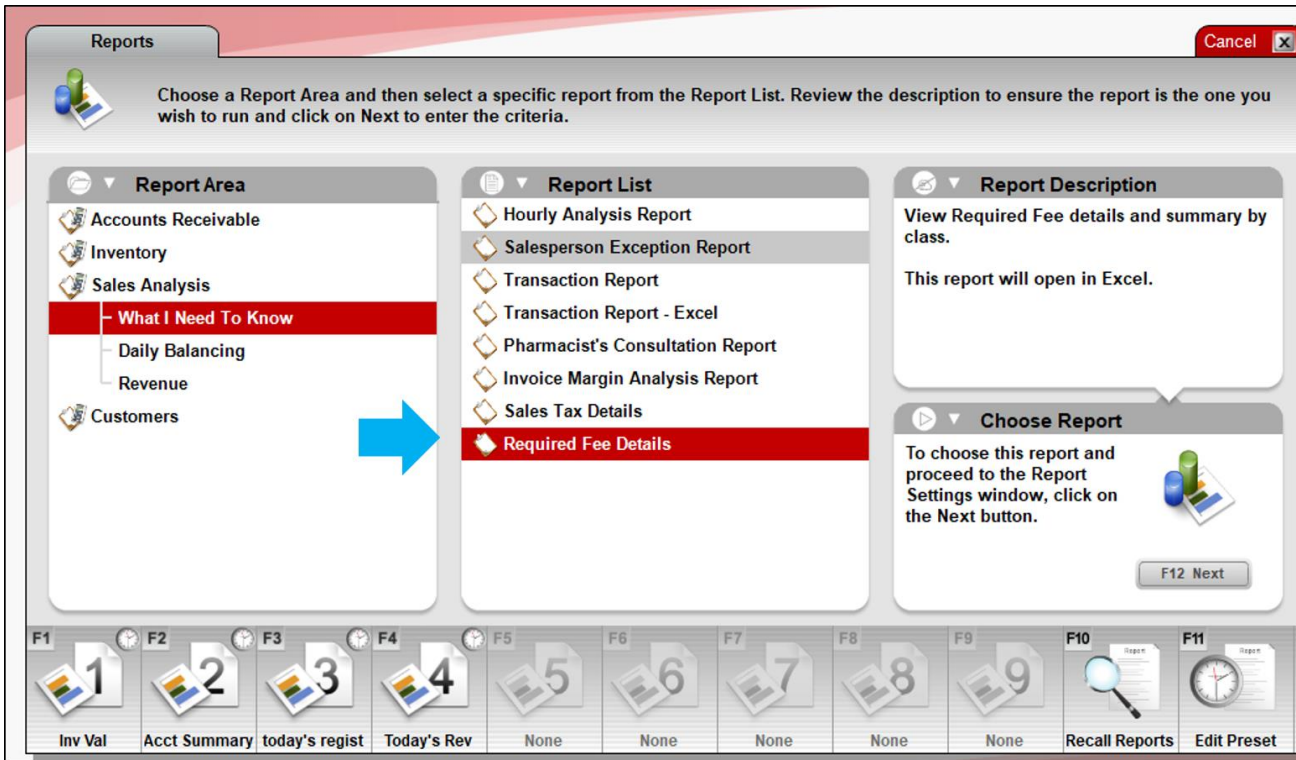
## New item fee details report

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

- 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**.

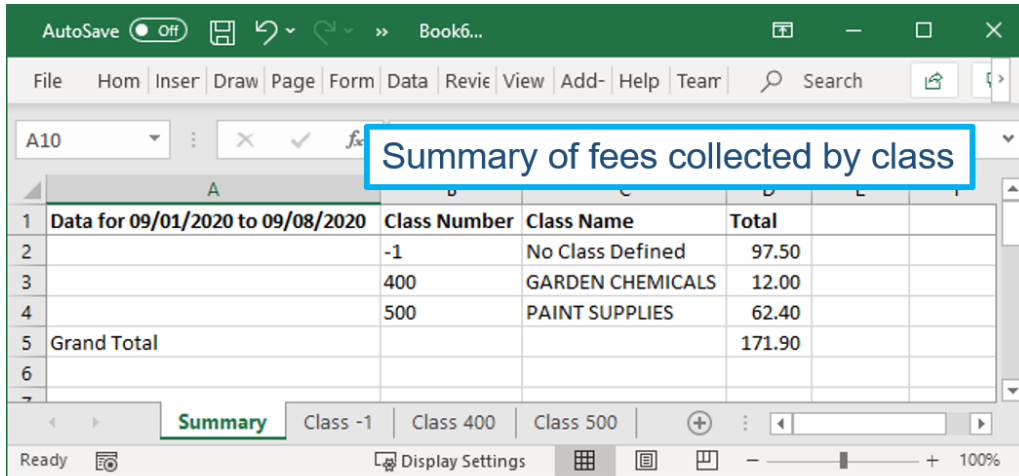
Inventory	Order Control	Pricing	General
Part # <b>P1234</b>	Desc 1 <b>PEST FREE 5 LB</b>	On Order: <b>0</b>	Defective: <b>0</b>
Alt #	Desc 2	On Hold: <b>0</b>	Stock On Hand: <b>-112</b>
<b>Sales Details</b> Investment: \$0.00 Gross Profit: \$2,120.00 ROI: 100%	<b>Classes</b> Class: <b>400 - GARDEN CHEMICA</b> Subclass: <b>0 - None</b>	<b>Item Information</b> Location: <b>0 - None</b> Dept: <b>112 - LAWN &amp; GARDEN</b> U/M: <b>1 - EACH</b> Weight: 0.00 C/U Qty: 1.00 Label: EA	
<b>Forecast</b> Stock Days: <b>14</b> Need: <b>212</b> Cost: <b>\$2,120.00</b>	<b>Item Information</b> Tax Code: <b>Required Fee: 0.50</b> # Bintags: <b>1</b> Item Tag Required: <input type="checkbox"/>		
<b>Overstock</b> Overage: <b>0</b> Waste: <b>\$0.00</b>	<b>Item Information</b> Tax Code: <b>Required Fee: 0.50</b> # Bintags: <b>1</b> Item Tag Required: <input type="checkbox"/>		
<b>Shrinkage</b> Shrinkage: <b>0</b> Loss: <b>\$0.00</b> Reviewed: <b>03-Sep-20</b>	<b>Item Information</b> Tax Code: <b>Required Fee: 0.50</b> # Bintags: <b>1</b> Item Tag Required: <input type="checkbox"/>		

## New item fee details report

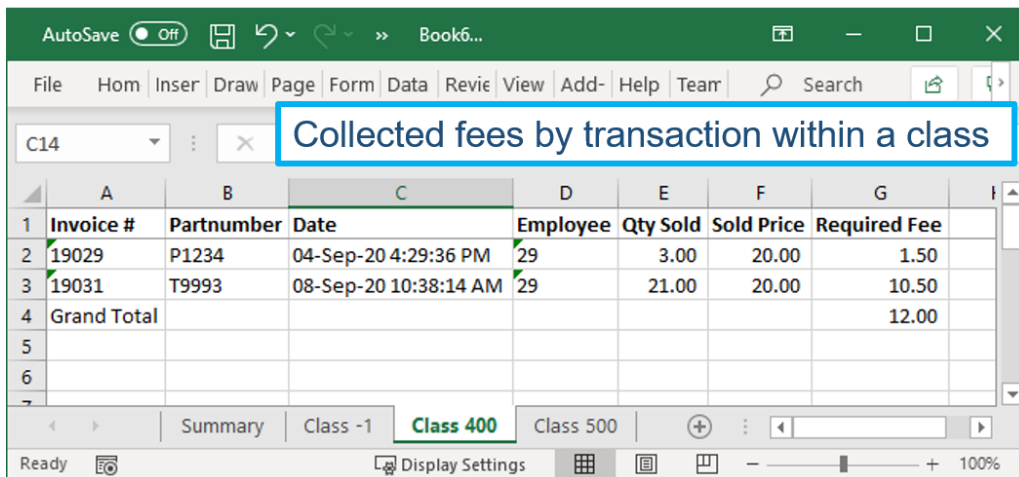


- The report is available in the **Reports** module under **Sales Analysis > What I Need to Know**.
- Select this report:  
*< Your fee name >* **Details**.
  - Example: **Required Fee Details**
- Select **Next**, select a time period and then run the report.

## New item fee details report



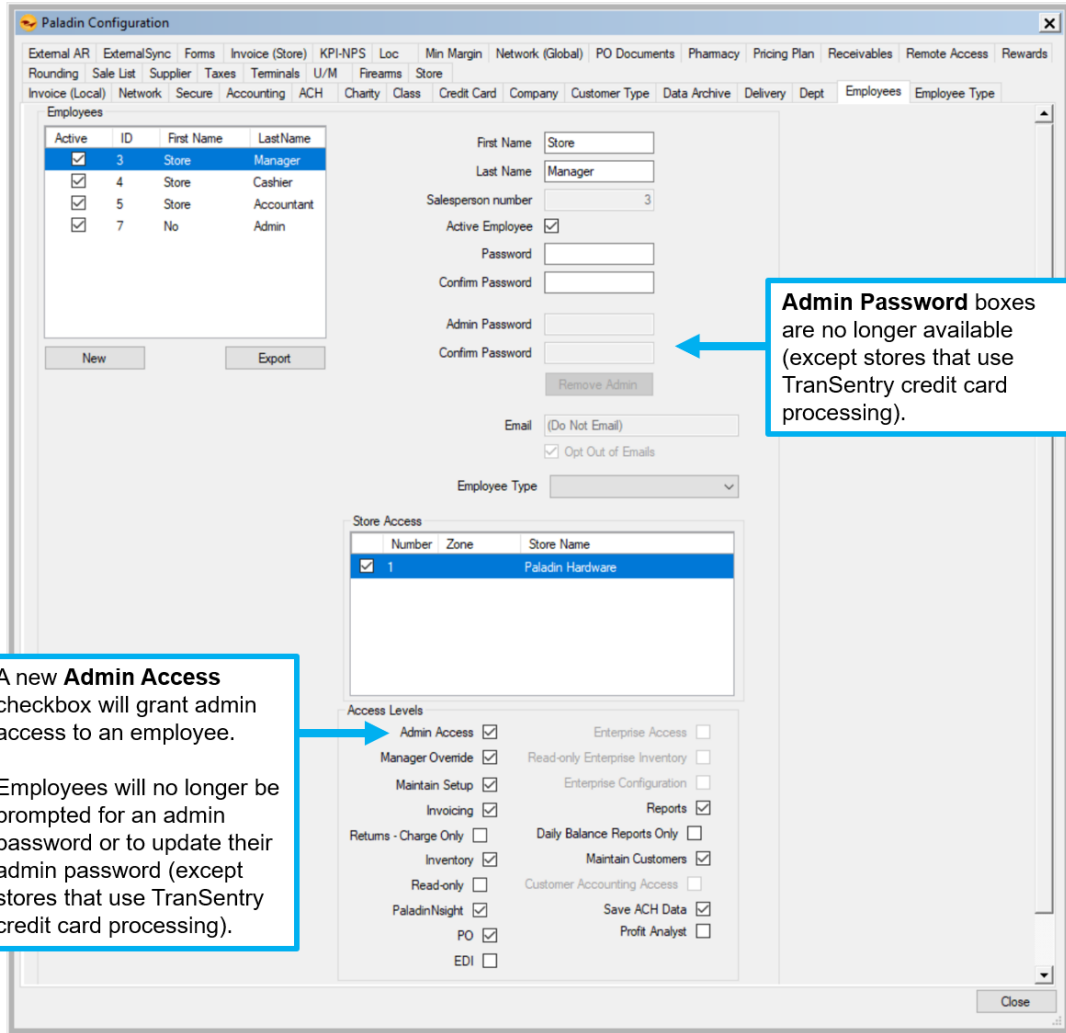
	Class Number	Class Name	Total
1	Data for 09/01/2020 to 09/08/2020		
2	-1	No Class Defined	97.50
3	400	GARDEN CHEMICALS	12.00
4	500	PAINT SUPPLIES	62.40
5	Grand Total		171.90



	Invoice #	Partnumber	Date	Employee	Qty Sold	Sold Price	Required Fee
2	19029	P1234	04-Sep-20 4:29:36 PM	29	3.00	20.00	1.50
3	19031	T9993	08-Sep-20 10:38:14 AM	29	21.00	20.00	10.50
4	Grand Total						12.00

- 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	Last Name
<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

First Name:   
 Last Name:   
 Salesperson number:   
 Active Employee:   
 Password:   
 Confirm Password:   
 Admin Password:   
 Confirm Admin Password:   
 Remove Admin  
 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"/> PaladinNight	<input checked="" type="checkbox"/> Save ACH Data
<input checked="" type="checkbox"/> PO	<input type="checkbox"/> Profit Analyst
<input type="checkbox"/> EDI	

**Callout 1:** Admin Password boxes are no longer available (except stores that use TranSentry credit card processing).

**Callout 2:** 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.

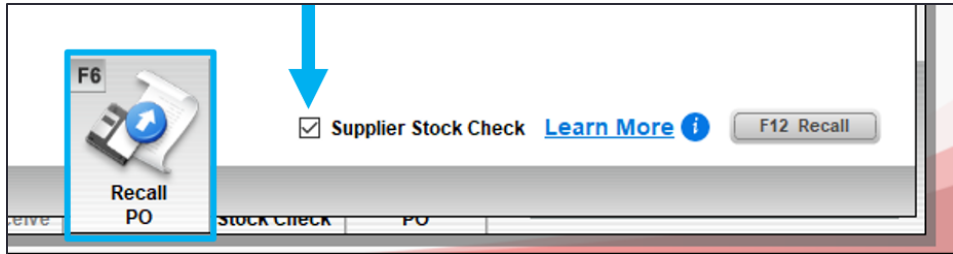
## Itemized taxes on receipts

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	
		<b>TOTAL \$</b>	<b>27.61</b>	
		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.

## Orgill stock availability on POs



Purchase Order Confirm PO Cancel

Days 14 Supplier 10 - ORGILL Address 2 Phone

EDI  Address 1 City/State/Zip Fax

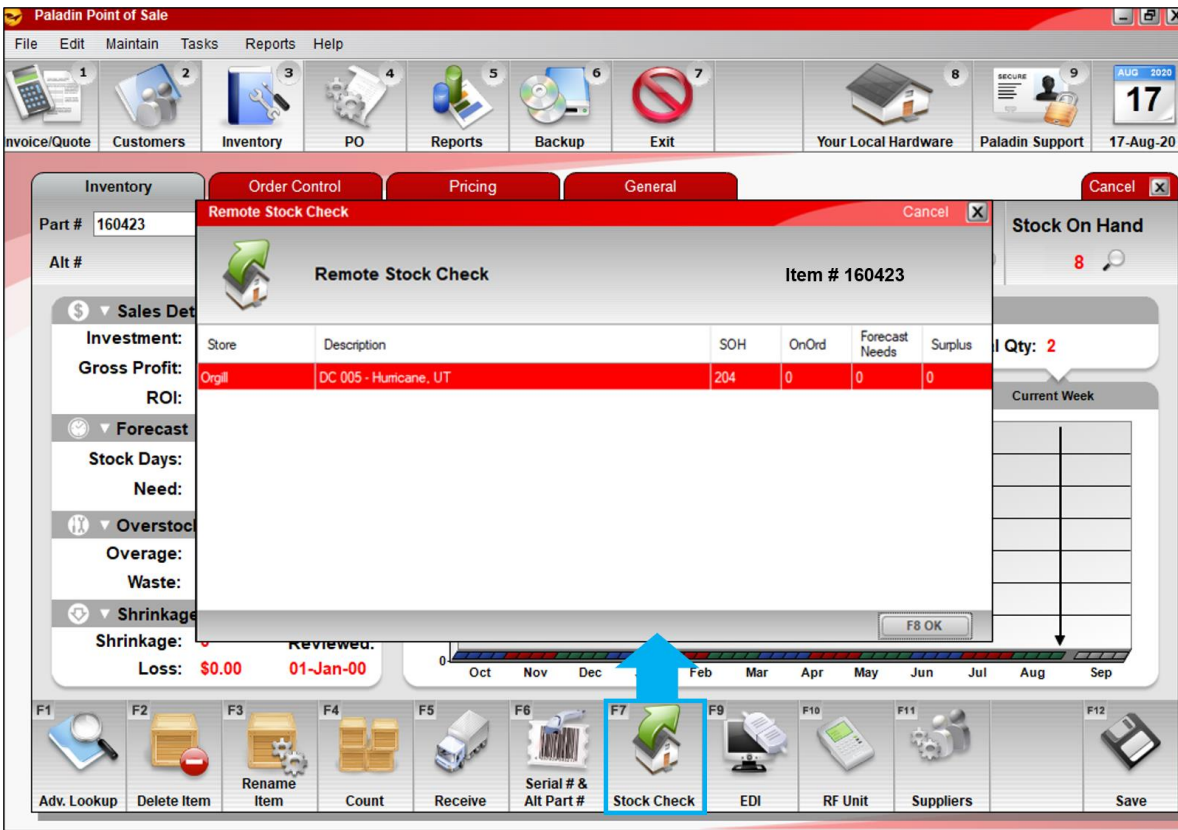
<input type="checkbox"/>	Part Number	Description	SOH/ORD	Quantity	Cost	Extension
<input type="checkbox"/>	SUPPLIER OUT OF STOCK					
	NOTES					
<input type="checkbox"/>	12345	GAS BBQ	EACH	8	2 \$ 125.00	\$ 250.00
	12345	Need: 2, OrdQty: 1.00, Min: 0.00, Max: 16.00, Ord%: 100%		0		
<input type="checkbox"/>	PARTIAL STOCK AVAILABLE					
	NOTES					
<input type="checkbox"/>	160423	RED ADIRONDACK CHAIR	EACH	1	20 \$ 11.700	\$ 234.00
	160423	Need: 20, OrdQty: 1.00, Min: 0.00, Max: 24.00, Ord%: 100%		0		
<input type="checkbox"/>	STOCK AVAILABLE					
	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

- Sort an Orgill PO by availability at your designated Orgill Distribution Center (DC) .
- In **Recall PO** window, select **Supplier Stock Check** before you recall an Orgill PO.
- PO is sorted by:
  - **SUPPLIER OUT OF STOCK**
  - **PARTIAL STOCK AVAILABLE**
  - **STOCK AVAILABLE**

## Orgill stock on hand for PO and inventory items



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
Orgill	DC 005 - Hurricane, UT	204	0	0	0

Stock On Hand Qty: 2

Current Week


Loss: \$0.00 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 F9 EDI F10 RF Unit F11 Suppliers F12 Save

- View Orgill DC stock on hand for individual PO items and in the **Inventory** module.
- On the bottom ribbon, click **Stock Check** or **Transfer** (multi-store), or press F7.
- Orgill SOH is updated hourly in Paladin.

## Orgill stock on hand for inventory items



The screenshot shows the 'Paladin Point of Sale' software interface. The 'Inventory' module is active, and the 'Remote Stock Check' dialog box is open for item 160423. The dialog box displays a table with the following data:

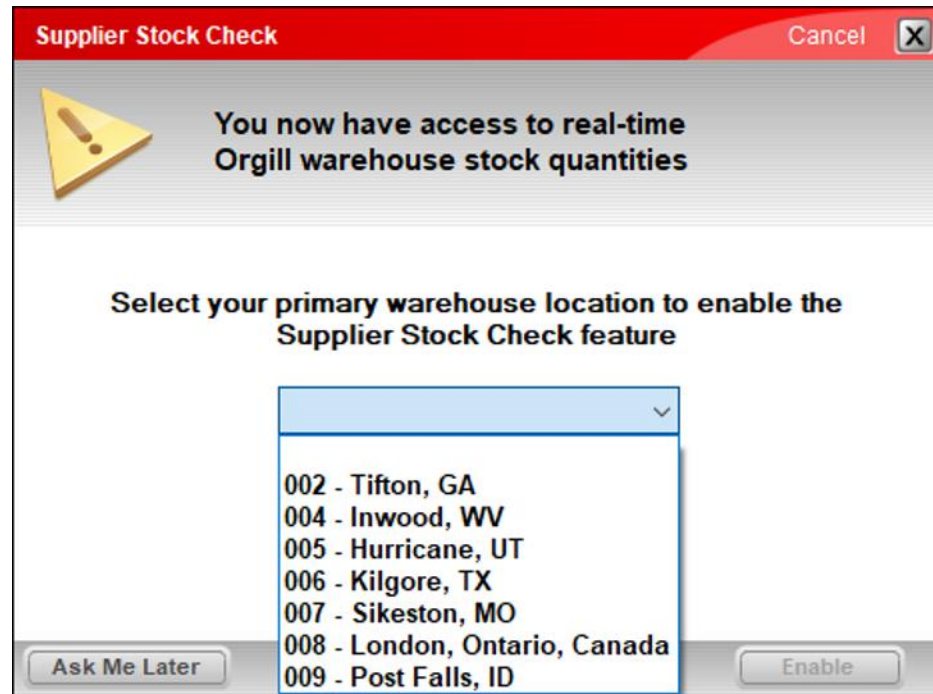
Store	Description	SOH	OnOrd	Forecast Needs	Surplus
Ace - CD01	RED ADIRONDACK CHAIR	9	0	0	0

The 'Stock On Hand' section shows a quantity of 2. The 'Reviewed' date is 01-Jan-00. The 'F7' key is highlighted in the bottom toolbar, indicating the 'Stock Check' function.

- Orgill DC quantity on hand is also available in the **Inventory** module.
- Click **Stock Check | Transfer** (multi-store) or press F7.



## Setting the DC location turns on the stock on hand features



- When the DC SOH feature is available and you click **Recall PO**, you are prompted to select a DC location.
- Click **Enable** to turn on the feature.
- To change the DC location later, contact Paladin Support.

New point of sale features coming soon

Release 2021 - A

# Coming Soon – Pick List Report

Recall Transaction Cancel X

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

- 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

	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%

For additional details, view the

# Paladin 2020 Release Guide

[portal.paladinpos.com/new-features/summer-2020](https://portal.paladinpos.com/new-features/summer-2020)

A dark red rectangular box containing a white question mark icon inside a circle, with the text "Q&A" below it.

**Q&A**



Check out our [2020 Release Guide](#) on the Help Portal.

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