



Fall Virtual User Meeting

Charles Owen
Chief Experience Officer
September 28, 2021

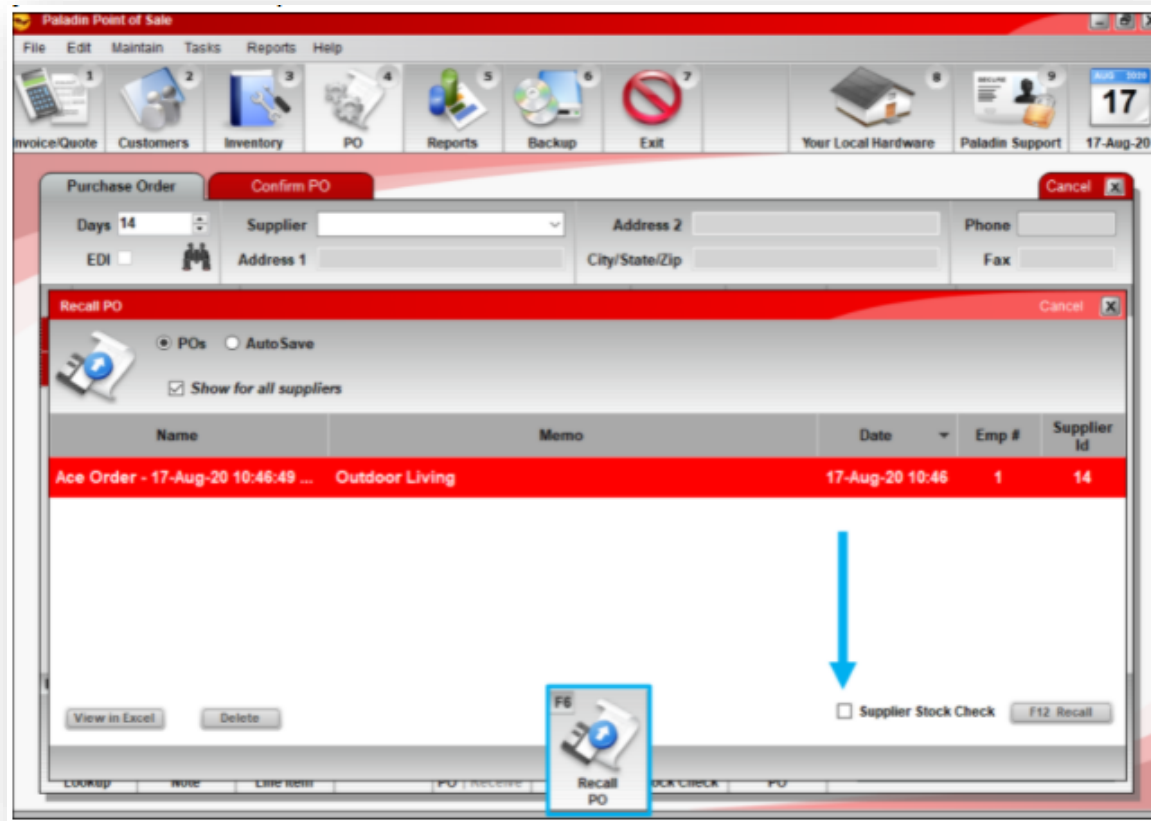
WHAT YOU'LL LEARN

- Our 2021 releases include:
 - True Value RDC Nightly Updates
 - 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

True Value RSC updates nightly



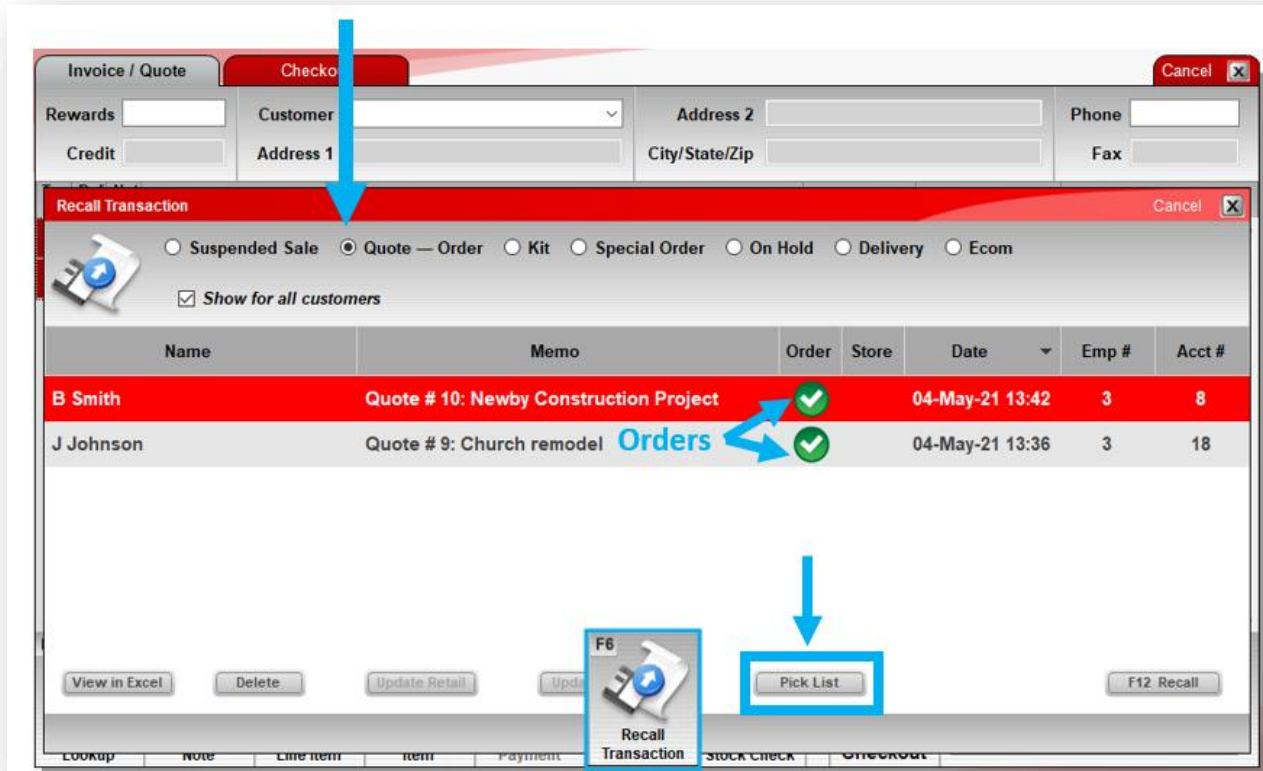
True Value Remote Stock Check stock on hand will be updated automatically overnight, eliminating the need to manually process the True Value Regional Distribution Center (RDC) Balances EDI file.

1. Stock on hand
2. On order quantity

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.

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	
1	Date	Type	Filename	Memo	Salesperson Id	Account number	Name	Part number	Description 1	Quantity	Price	
2	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	
3	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	
4	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	
5	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	
6					0							
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

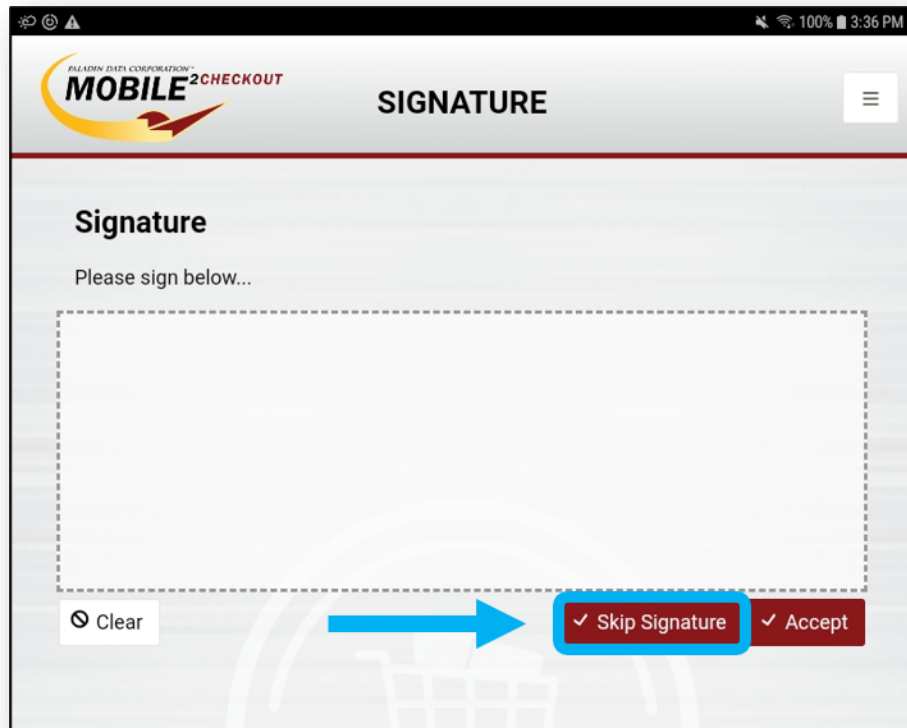
57%

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.

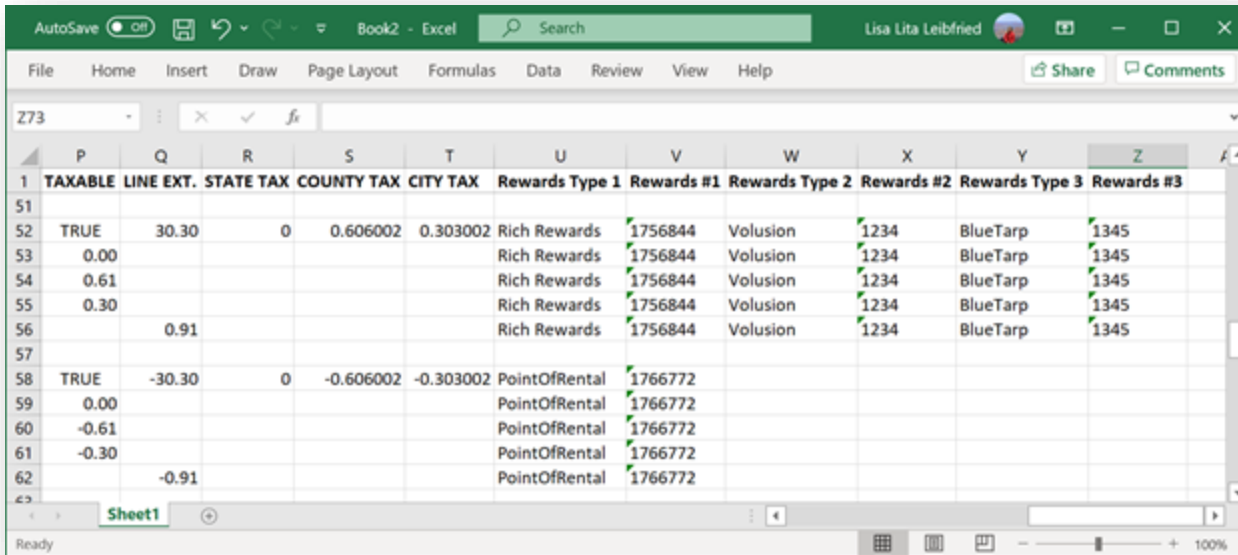
Skip signatures on Mobile2Checkout app



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.

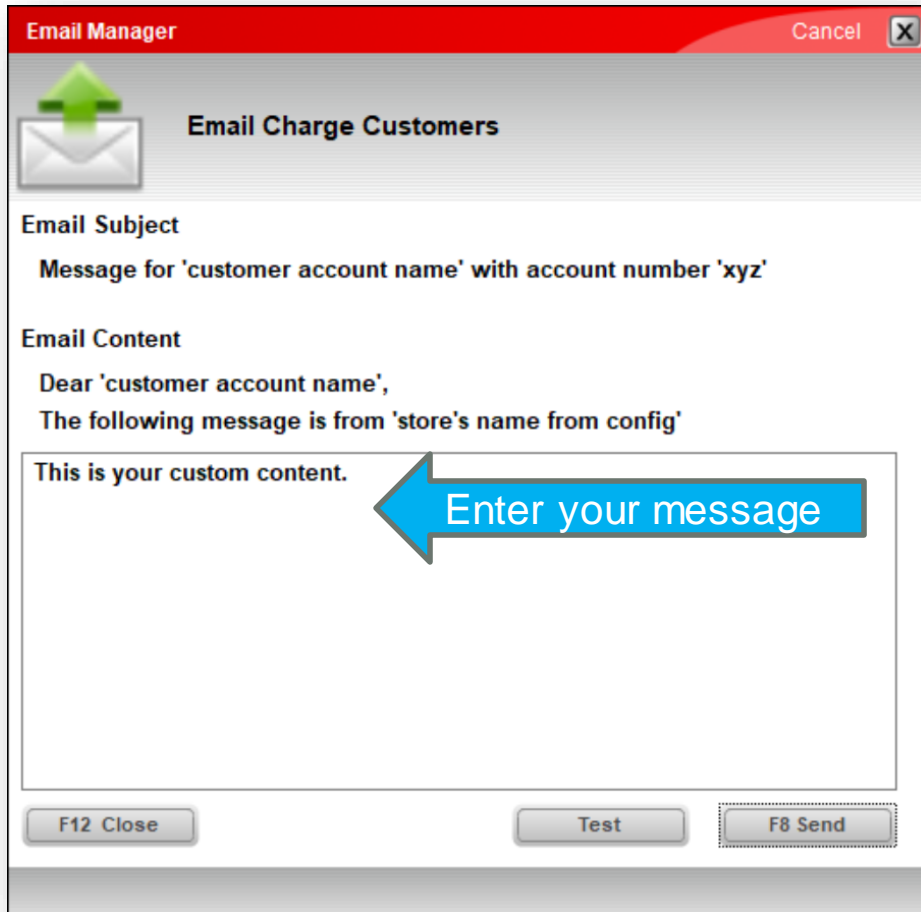
Transaction Report includes Rewards IDs



	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 green envelope icon with an upward arrow and the text "Email Charge Customers". The window is divided into sections for "Email Subject" and "Email Content". The subject field contains the text "Message for 'customer account name' with account number 'xyz'". The content field contains a pre-written message: "Dear 'customer account name',
The following message is from 'store's name from config'". Below this is a large text area for custom content, which currently contains the text "This is your custom content." A blue arrow points to this text area with the label "Enter your message". At the bottom of the window are three buttons: "F12 Close", "Test", and "F8 Send".

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'

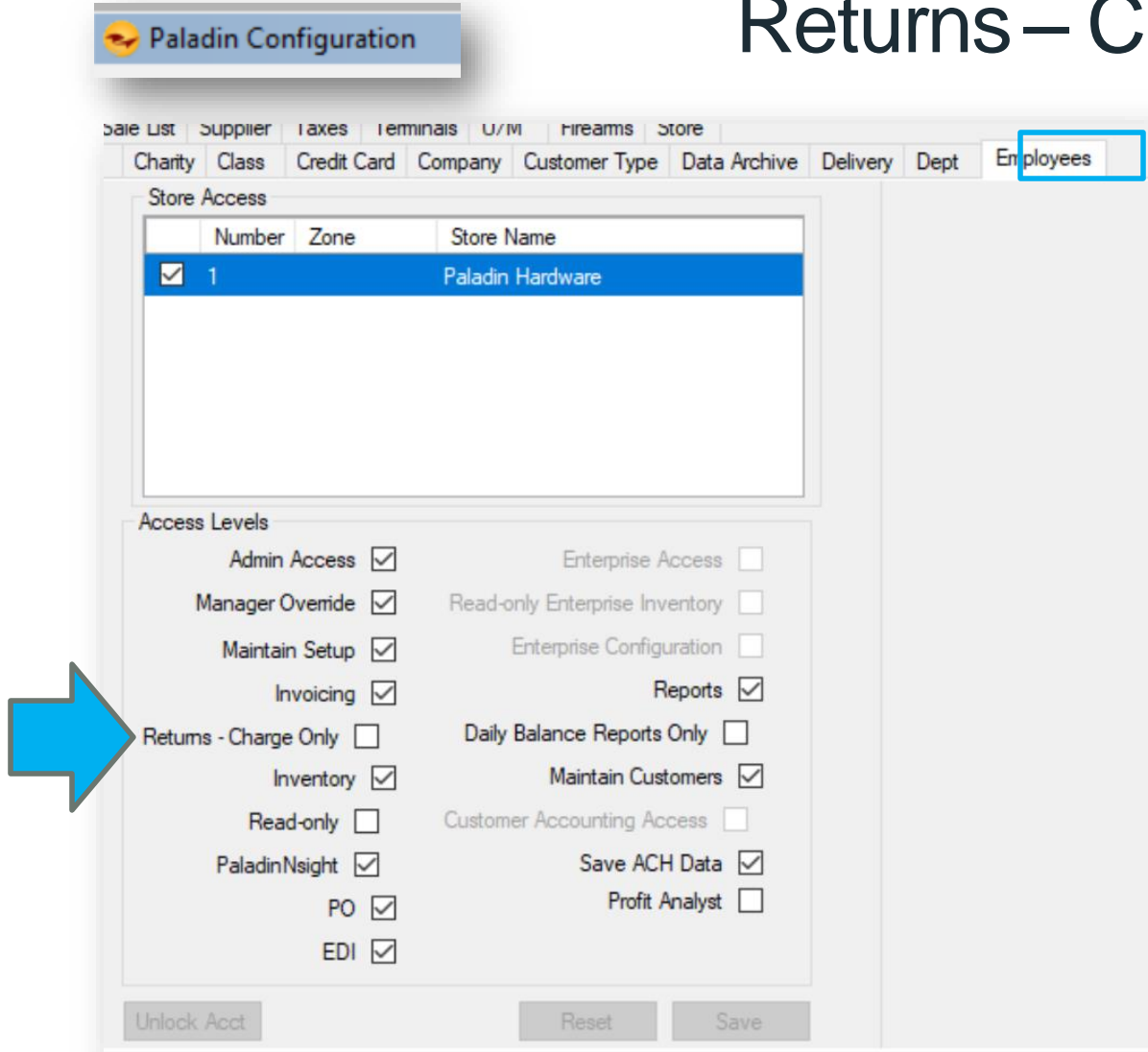
This is your custom content.

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



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.

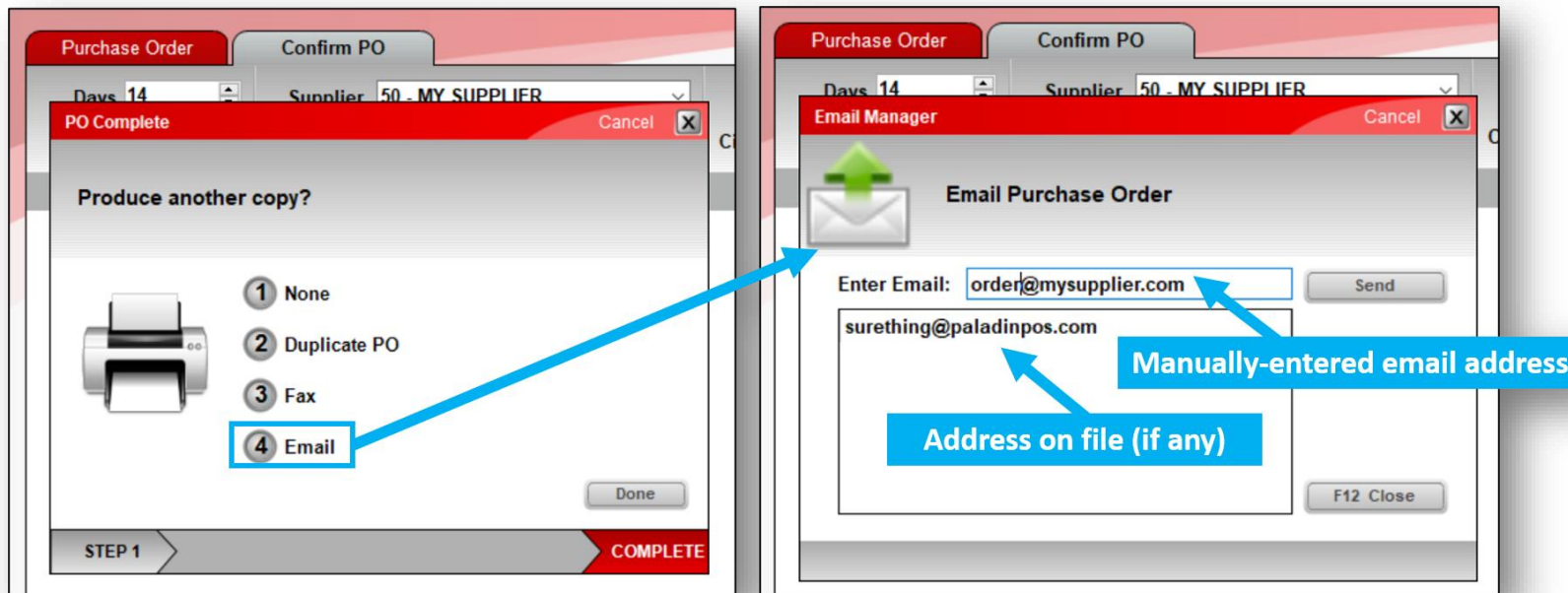
Collect on Delivery



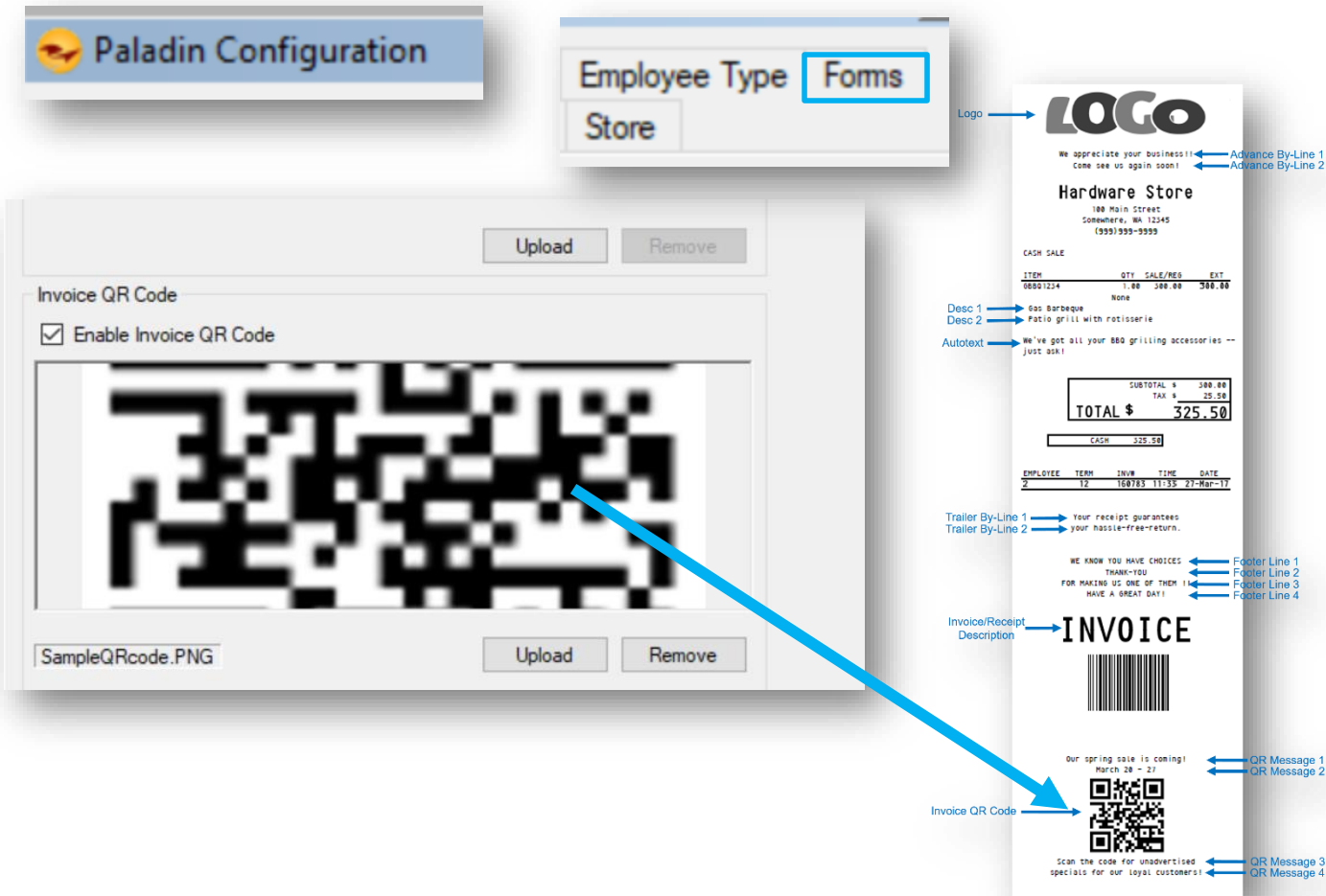
- Collect on delivery (COD) feature allows your customers to pay for purchases when they are delivered.
- The feature is available in these scenarios:
 - When a customer has no store credit.
 - When a customer exceeds their store credit.

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

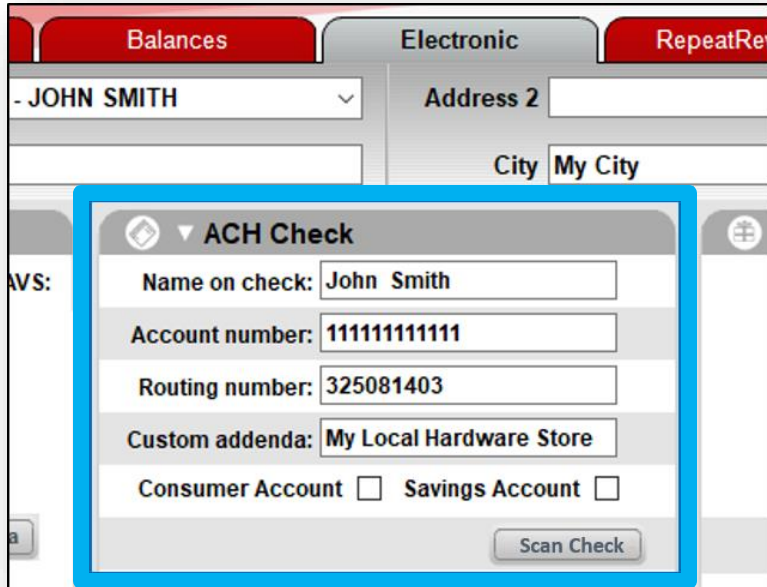
Invoice QR Code →

Scan the code for unadvertised specials for our loyal customers!

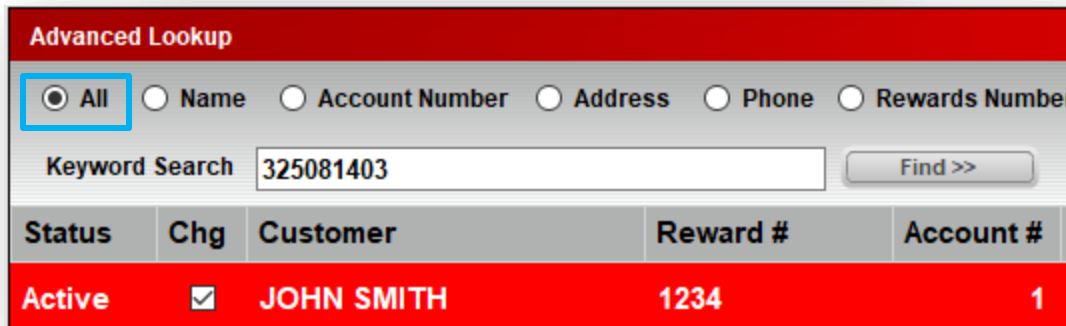
QR Message 3
QR Message 4

- 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

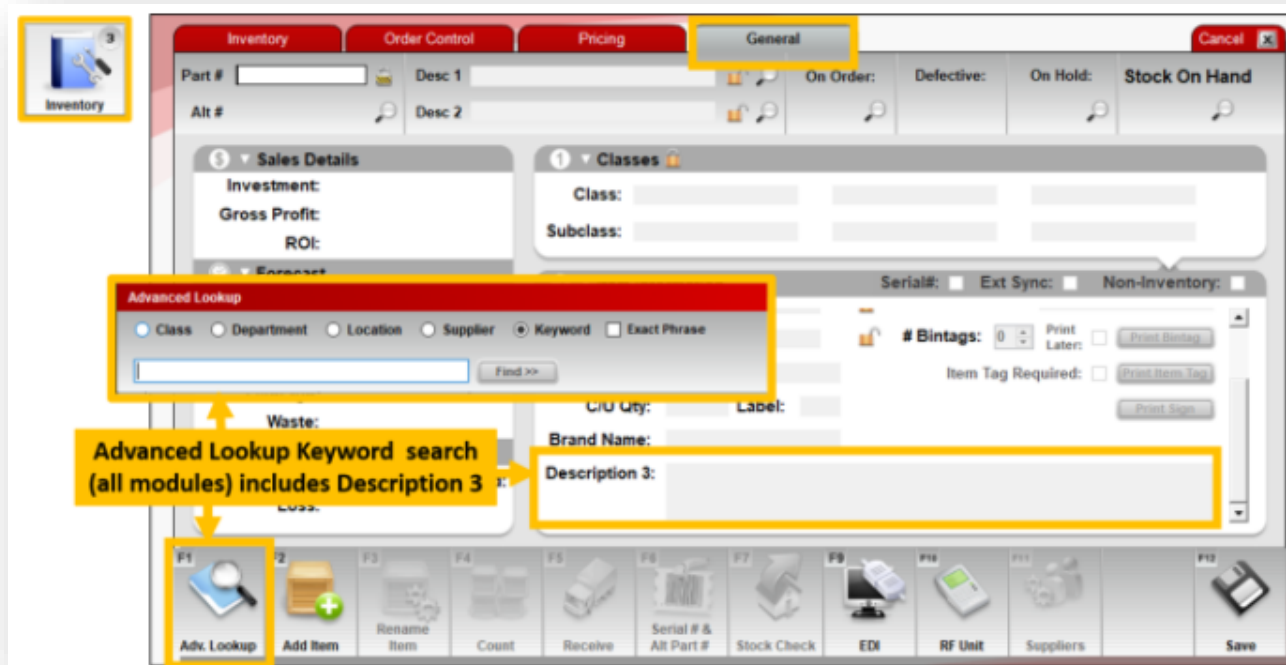



- In the **Customers** module, Advanced Lookup will search customer **ACH Check** fields when you do an **All** category search.

Status	Chg	Customer	Reward #	Account #
Active	<input checked="" type="checkbox"/>	JOHN SMITH	1234	1

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).

Exclude Description 2 from customer receipts

Invoice / Quote			Checkout		
Rewards			Customer		
Credit			Address 1		
			Address 2		
			City/State/Zip		
Tax	Def	Net	Part Number	Description	Quant
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F34567	3 IN PAINTBRUSH	EACH
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F34567	Item Cancelled by Supplier	
83	0			5.00	

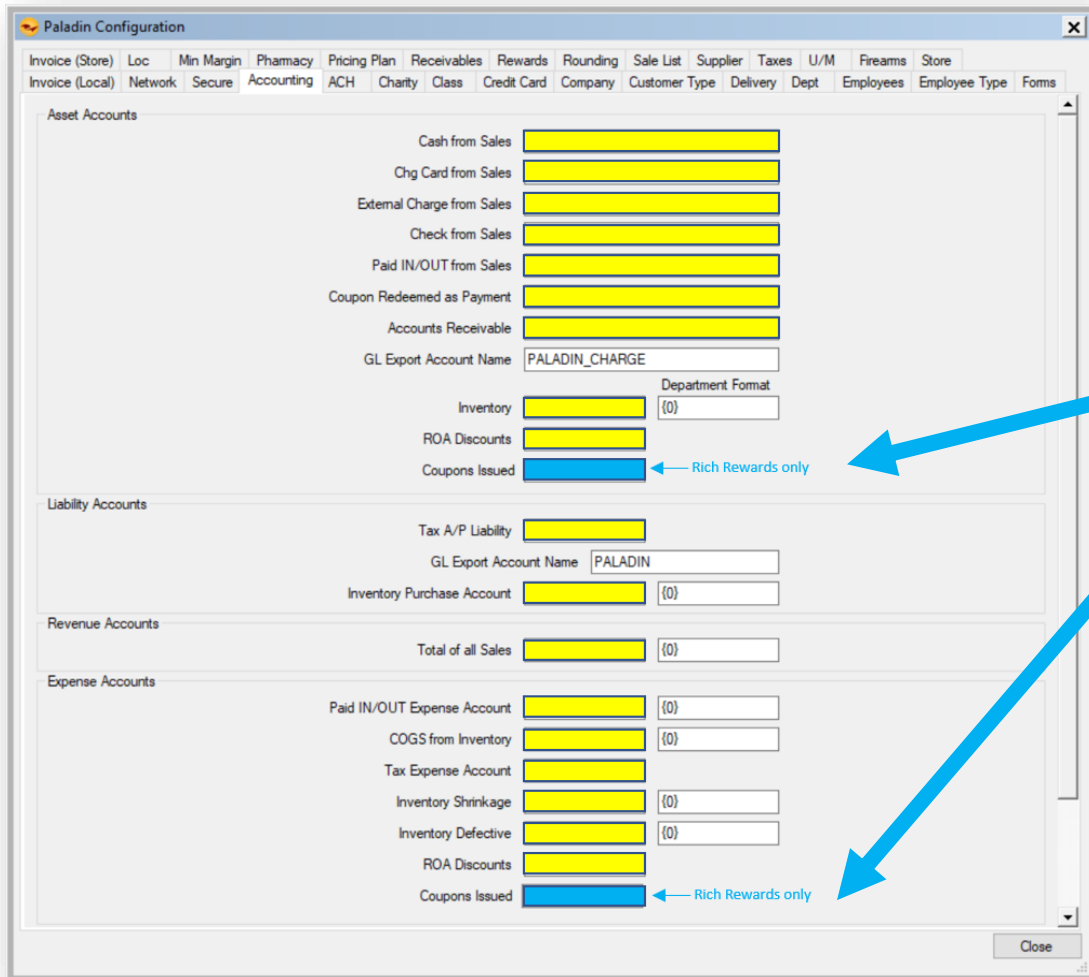
Paladin Configuration					
Invoice (Local)	Network	Secure	Accounting	ACH	
Invoice (Store)	Loc	Min Margin	Pharmacy	Price	
<input checked="" type="checkbox"/> Display Description 2 in Invoice/Quote					
<input checked="" type="checkbox"/> Block Description 2 from Invoices and Reprints					

Desc 2
does not
appear

Your Local Hardware			
100 Hammer Way			
Hardware City, FL 99999			
123-456-7890			
CASH SALE			
ITEM	QTY	SALE/REG	EXT
F34567	1.00	5.00	5.00
EACH			
3 IN PAINTBRUSH			
SUBTOTAL \$		5.00	
TAX \$		0.50	
TOTAL \$		5.50	

- 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



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}

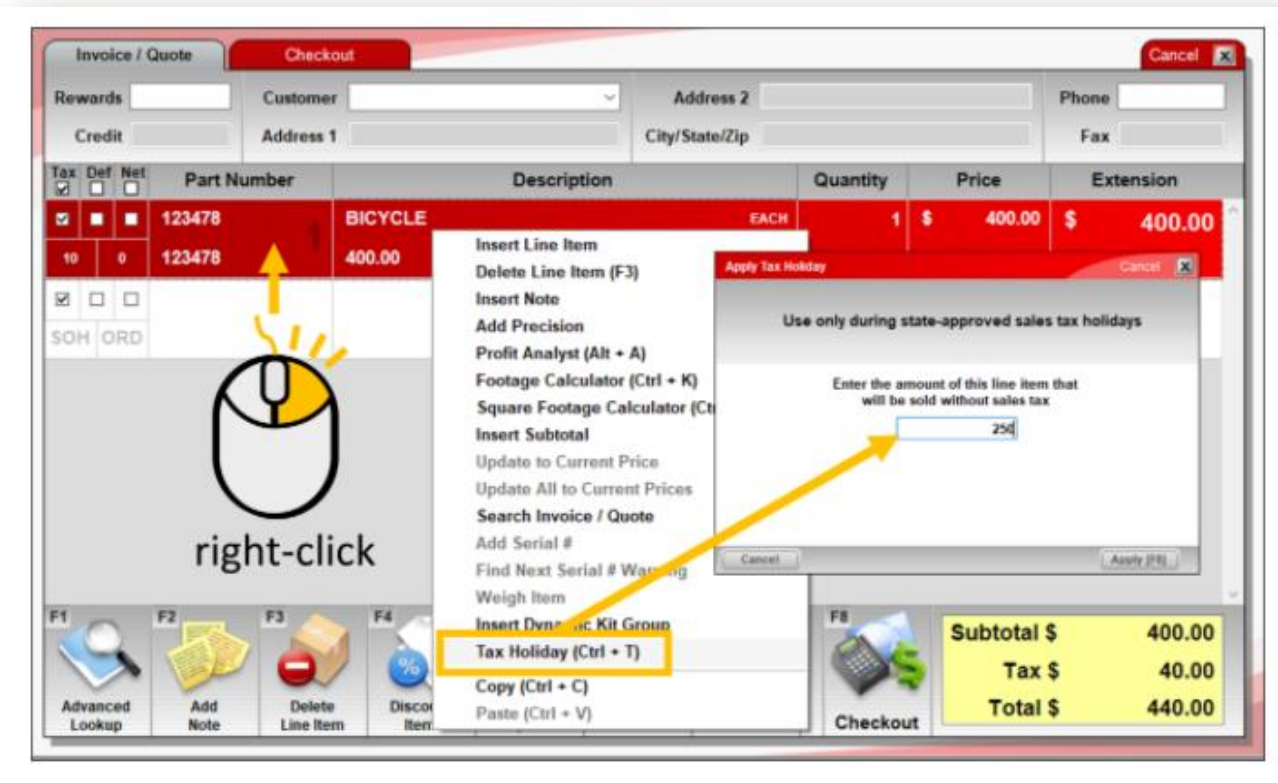
ROA Discounts

Coupons Issued ← Rich Rewards only

Close

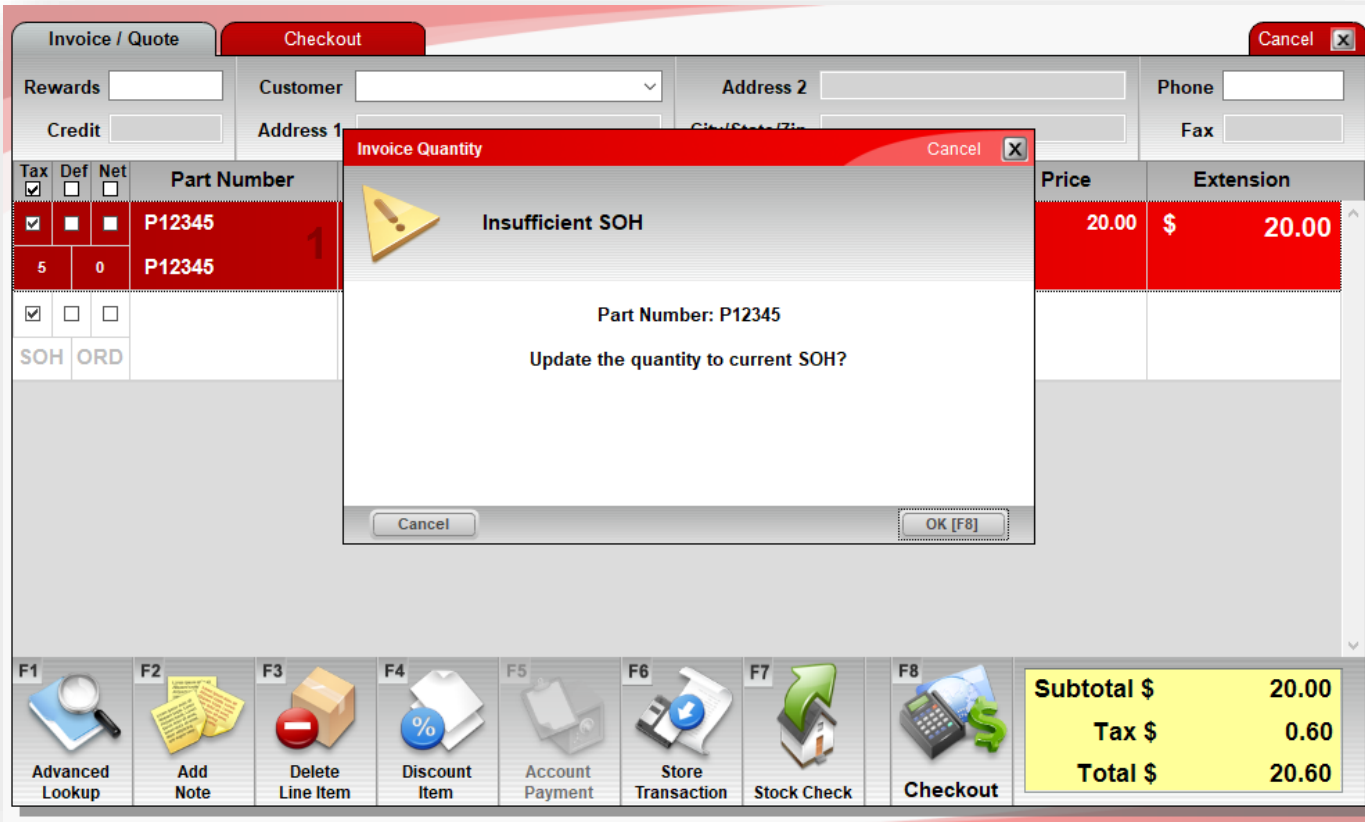
- New accounting categories for Rich Rewards coupons issued by the store.
 - **File > Setup > Accounting** tab
 - **Asset Accounts:** **Coupons Issued**
 - **Expense Accounts:** **Coupons Issued**
- Rich Rewards store-issued coupons were previously accounted for in
 - **Asset Accounts:** Inventory
 -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

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



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 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:

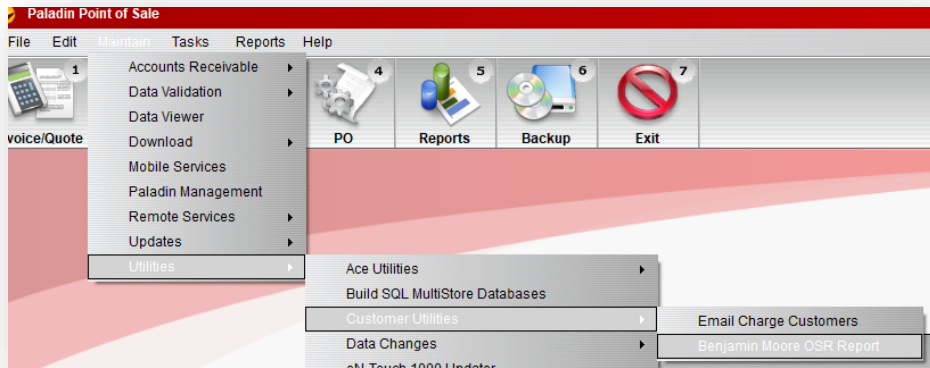
- Customer Information:** Rewards, Credit, Customer (dropdown), Address 1, Address 2, City/State/Zip, Phone, Fax.
- Item Table:**

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		
- Summary:**

Subtotal \$	20.00
Tax \$	0.60
Total \$	20.60
- Footer:** F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Discount Item, F5 Account Payment, F6 Store Transaction, F7 Stock Check, F8 Checkout.

- 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.

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

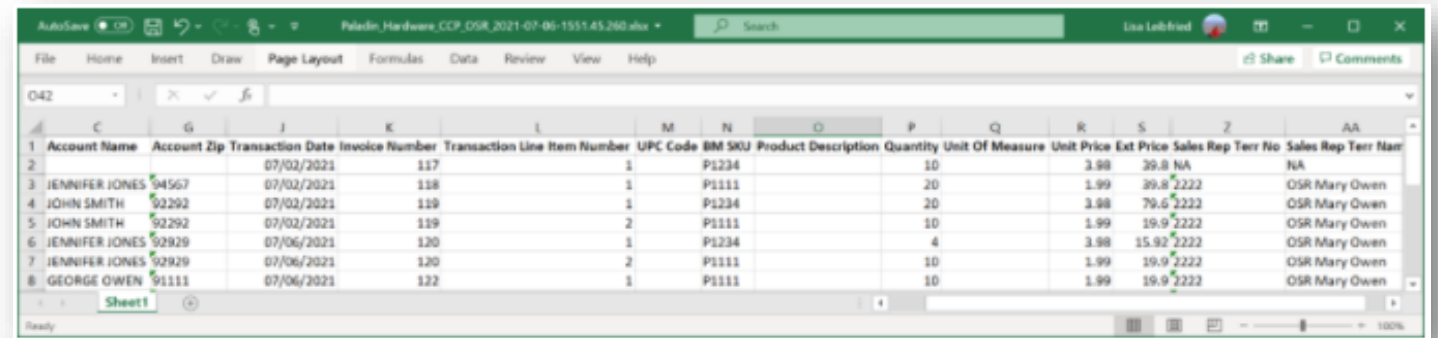
Include:

☐ 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

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

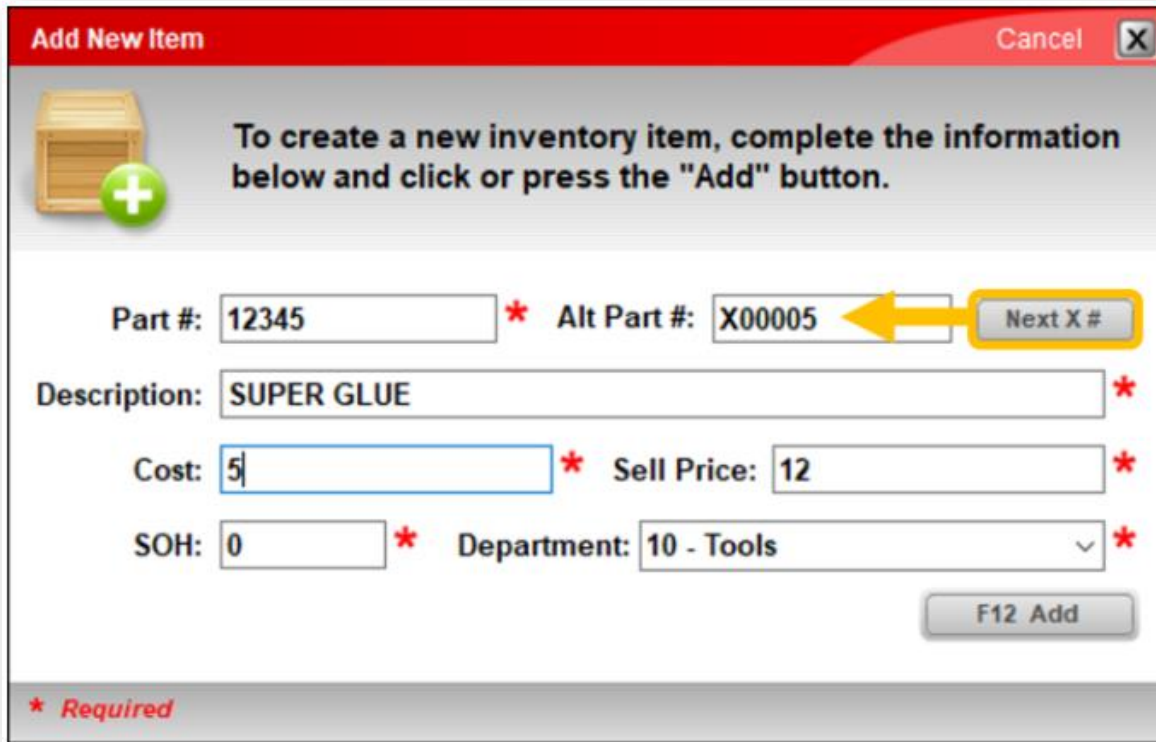


BIN TAG 42
2" x 1"
Adhesive label. Prints on label stock.
Barcode 128 containing part number.

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

- 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



The dialog box is titled "Add New Item" with a red header bar. It contains a wooden crate icon with a green plus sign. The main text says: "To create a new inventory item, complete the information below and click or press the 'Add' button." The form fields are: Part #: 12345 (with a red asterisk), Alt Part #: X00005 (with a red asterisk), Description: SUPER GLUE (with a red asterisk), Cost: 5 (with a red asterisk), Sell Price: 12 (with a red asterisk), SOH: 0 (with a red asterisk), and Department: 10 - Tools (with a red asterisk). A yellow arrow points from the "Next X #" button to the Alt Part # field. The "Next X #" button is highlighted with a yellow border. At the bottom right is a button labeled "F12 Add". At the bottom left is a red asterisk followed by the text "Required".

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 *

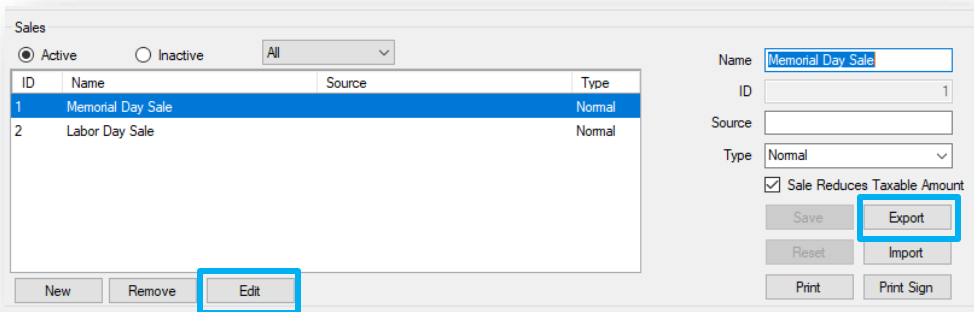
SOH: 0 * Department: 10 - Tools *

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**.

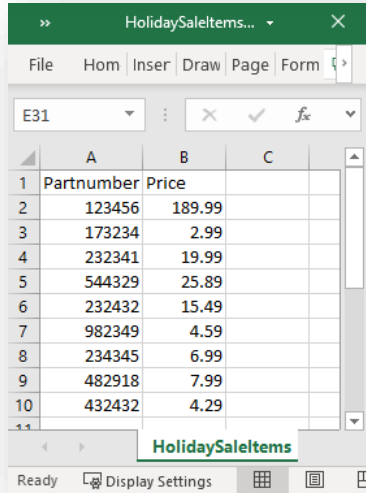
Export Your Sales into Excel



The Sales Management window shows a list of sales and an 'Export' button highlighted with a red box.

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

Buttons: New, Remove, **Edit** (highlighted), Save, Export (highlighted), Reset, Import, Print, Print Sign.



The Excel spreadsheet shows the exported sales data with columns for Partnumber and Price.

	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	

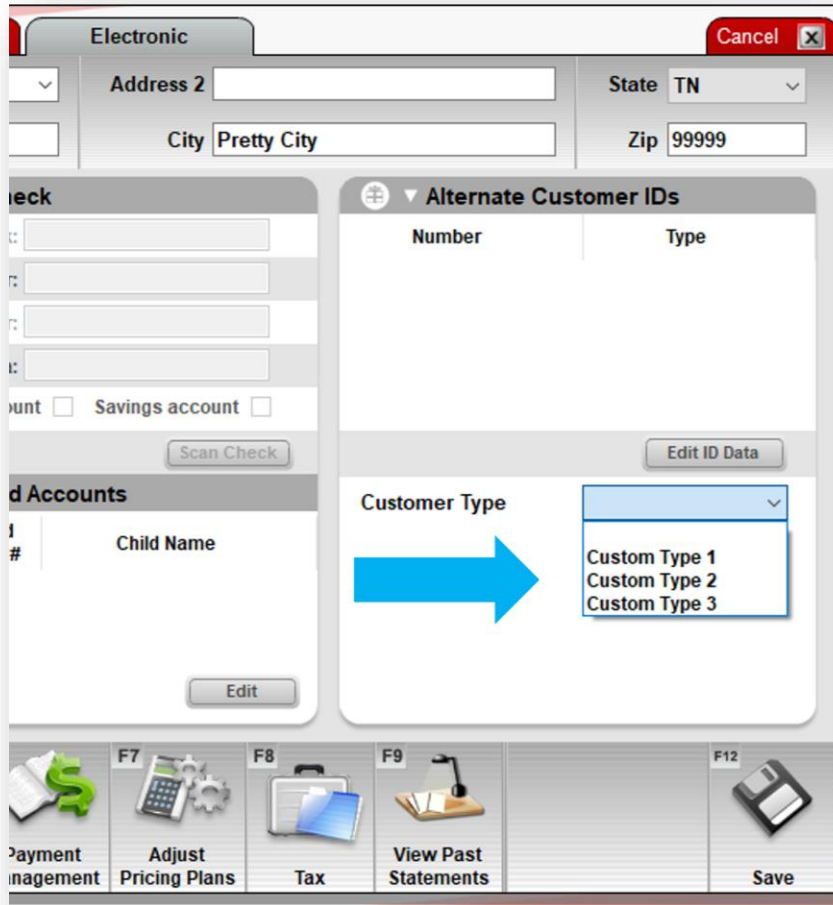
- A new **Export Sale List** feature lets you export sale item part numbers and prices into a tab-delimited text file that can be opened in Excel.
- From there, you can edit items and prices and re-import to update the sale or add to a new sale.
- Access from **File > Setup > Sale List** tab. Click **Edit** and then click **Export**.

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.

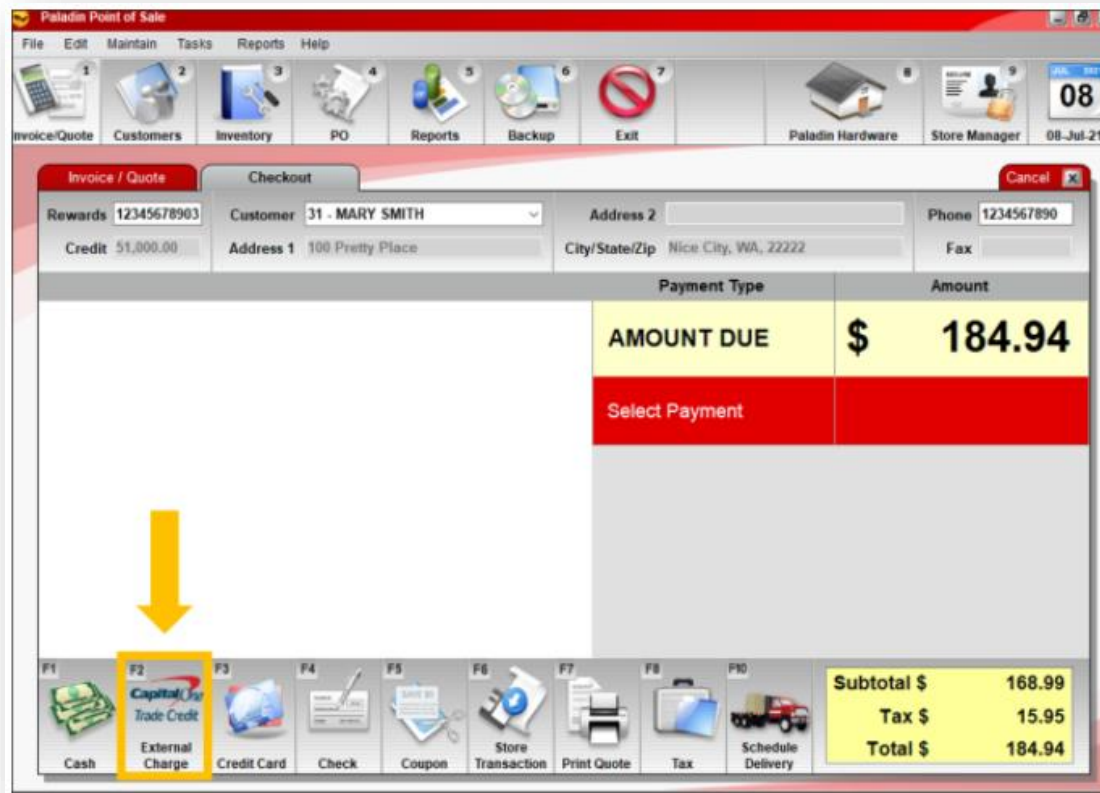
Limit customer types to those that you create



The screenshot shows a software interface for adding a new customer. The 'Electronic' tab is selected. Fields for 'Address 2', 'City' (filled with 'Pretty City'), 'State' (filled with 'TN'), and 'Zip' (filled with '99999') are visible. Below these is a 'Check' section with input fields and checkboxes for 'Savings account'. The 'Alternate Customer IDs' section contains a table with columns 'Number' and 'Type'. Below the table is a 'Customer Type' dropdown menu, which is open and shows three options: 'Custom Type 1', 'Custom Type 2', and 'Custom Type 3'. A large blue arrow points from the left towards the dropdown menu. At the bottom of the form is a toolbar with icons for 'Payment Management', 'Adjust Pricing Plans', 'Tax', 'View Past Statements', and 'Save'.

- 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**.

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](#)

[Paladin 2021-D Release Guide](#)

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How Paladin can Protect Your Business

October 5 @ 9am PT

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