Ace_Hardware_Logo.svg.jpg
October 17, 2018

UNIVERSITY

Virtual User Meeting – Spring 2021

True Value®

Charles Owen
Chief Experience Officer
February 23, 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
- New True Value features
- Coming Soon!

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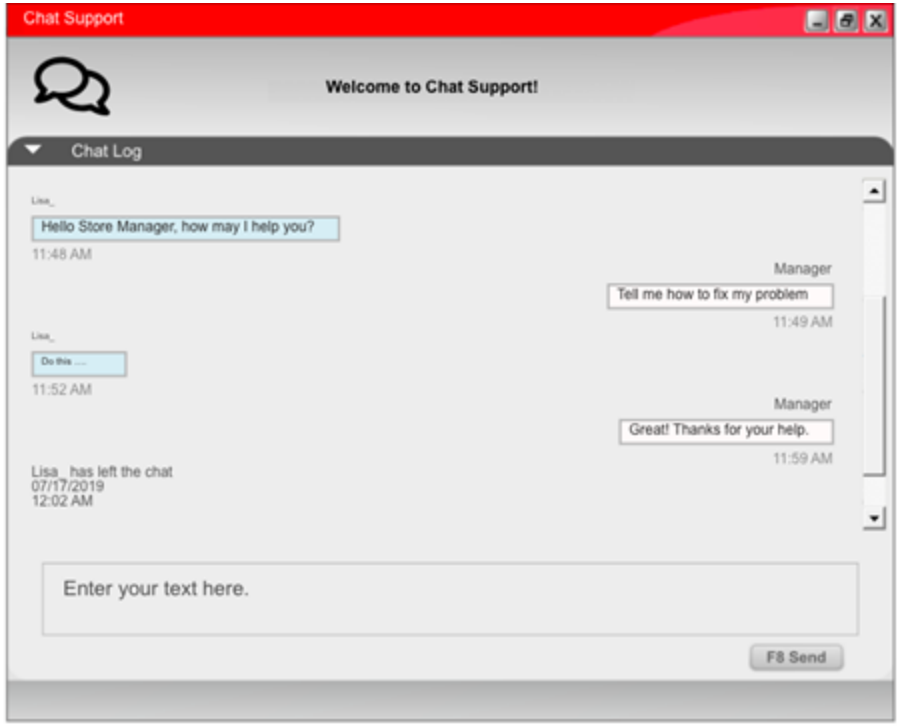
The New Help Request Portal

The new Help menu category: “Support”

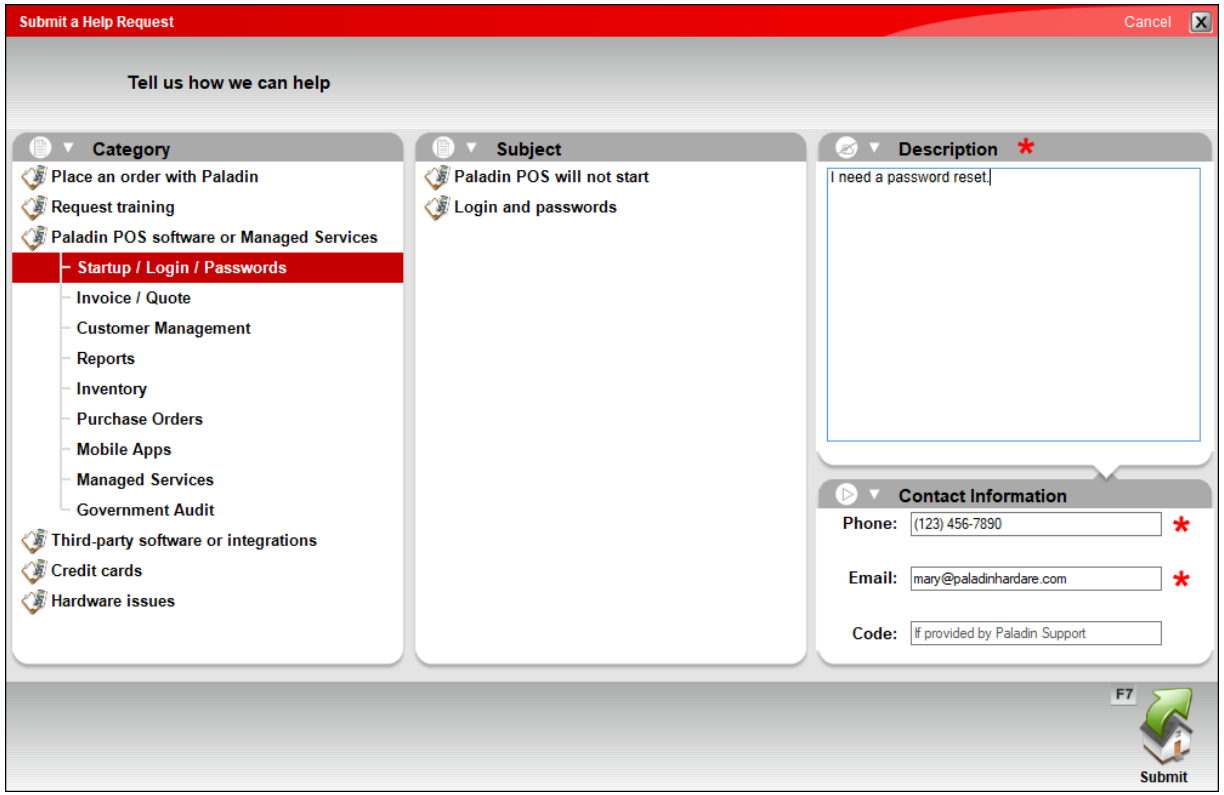
- A new **Support** category on the **Help** menu provides access to multiple support features:
- **Chat Support** gets you immediate help and quick answers to simple questions.
- **Submit a Help Request** lets you request help for more complex issues or when Chat Support is not available. This menu option replaces “Open a New Case”.
- **View Active Requests** replaces the “My Cases” page on the Help Portal website.

Chat Support



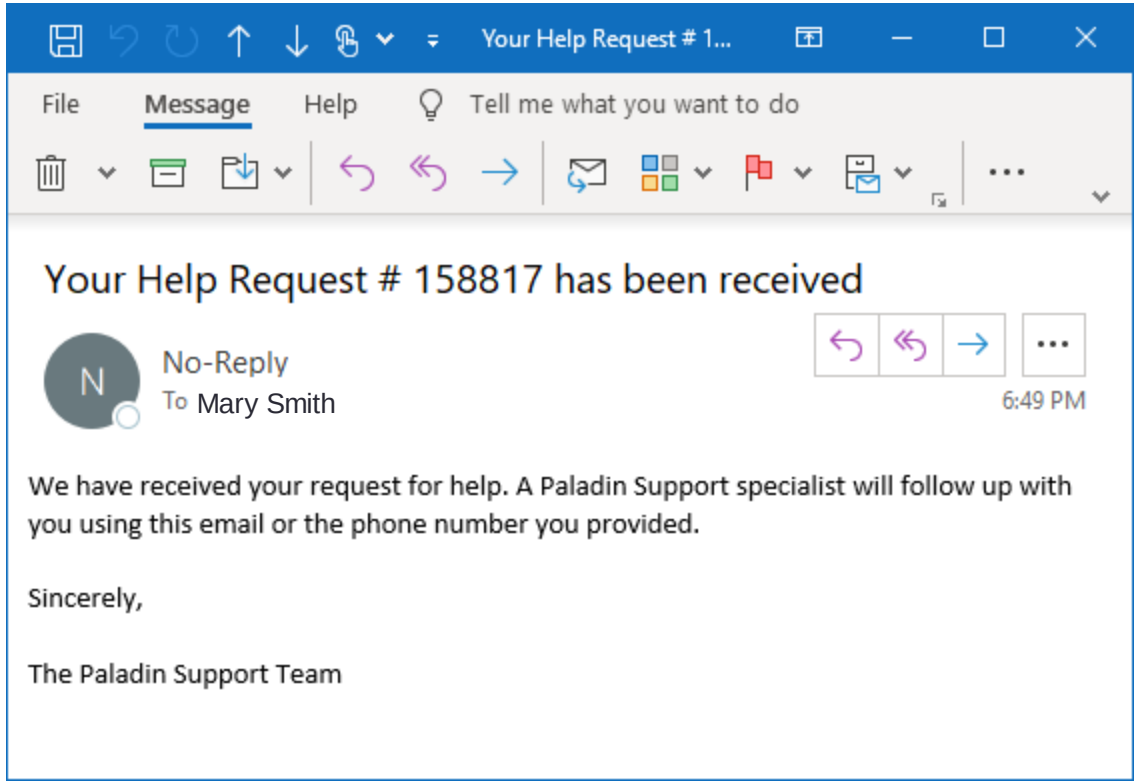
- Enter your question or inquiry and get real-time help from a Paladin Support representative.
- Chat Support is available 5 AM – 5 PM PST, Monday - Friday.

Submit a Help Request



- 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.

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

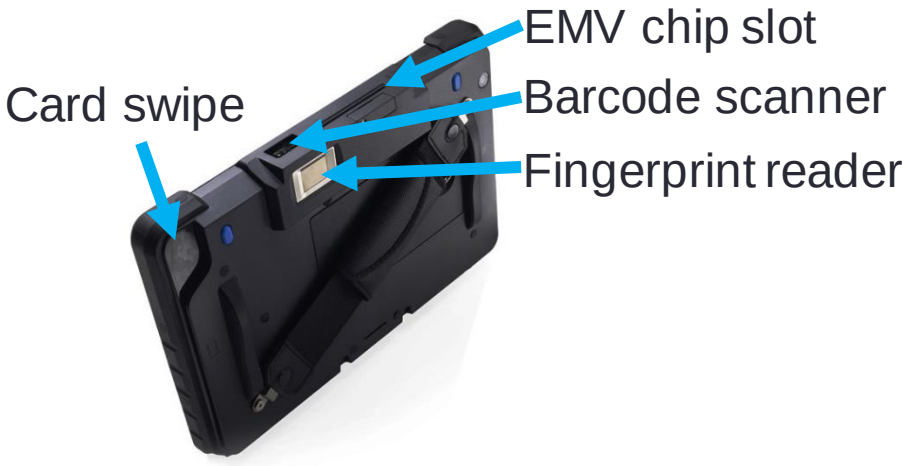
FastBound integration

- 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



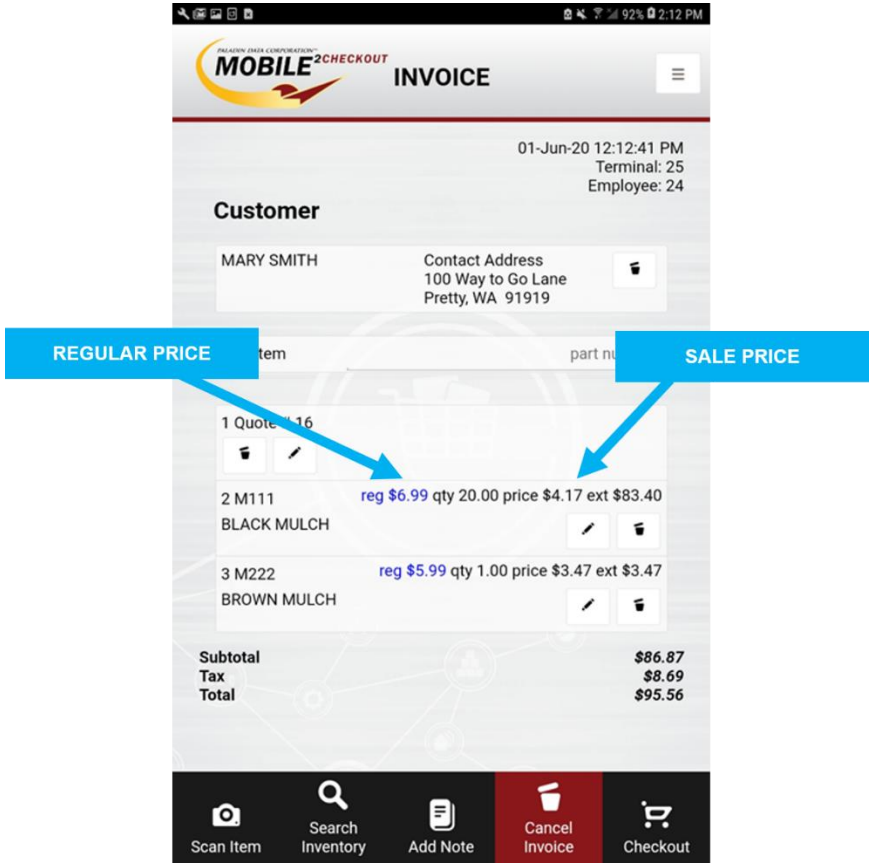
Touch Dynamic Quest III Tablet

- 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.
- Accept 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.

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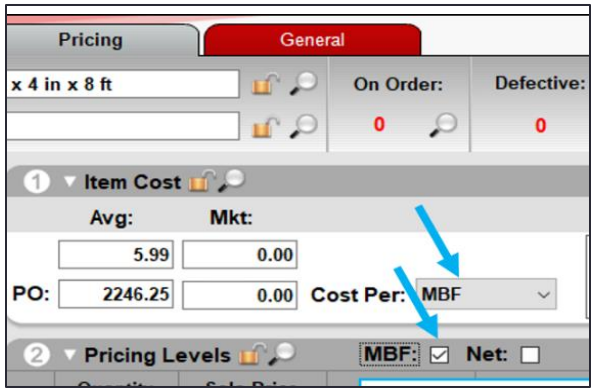
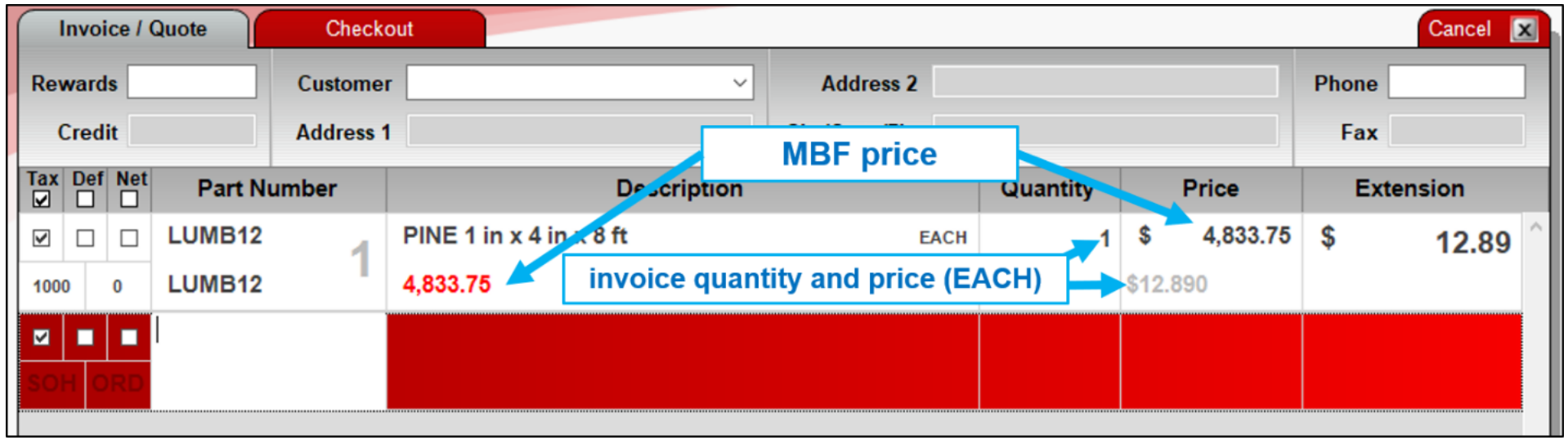
New point of sale features you can use now

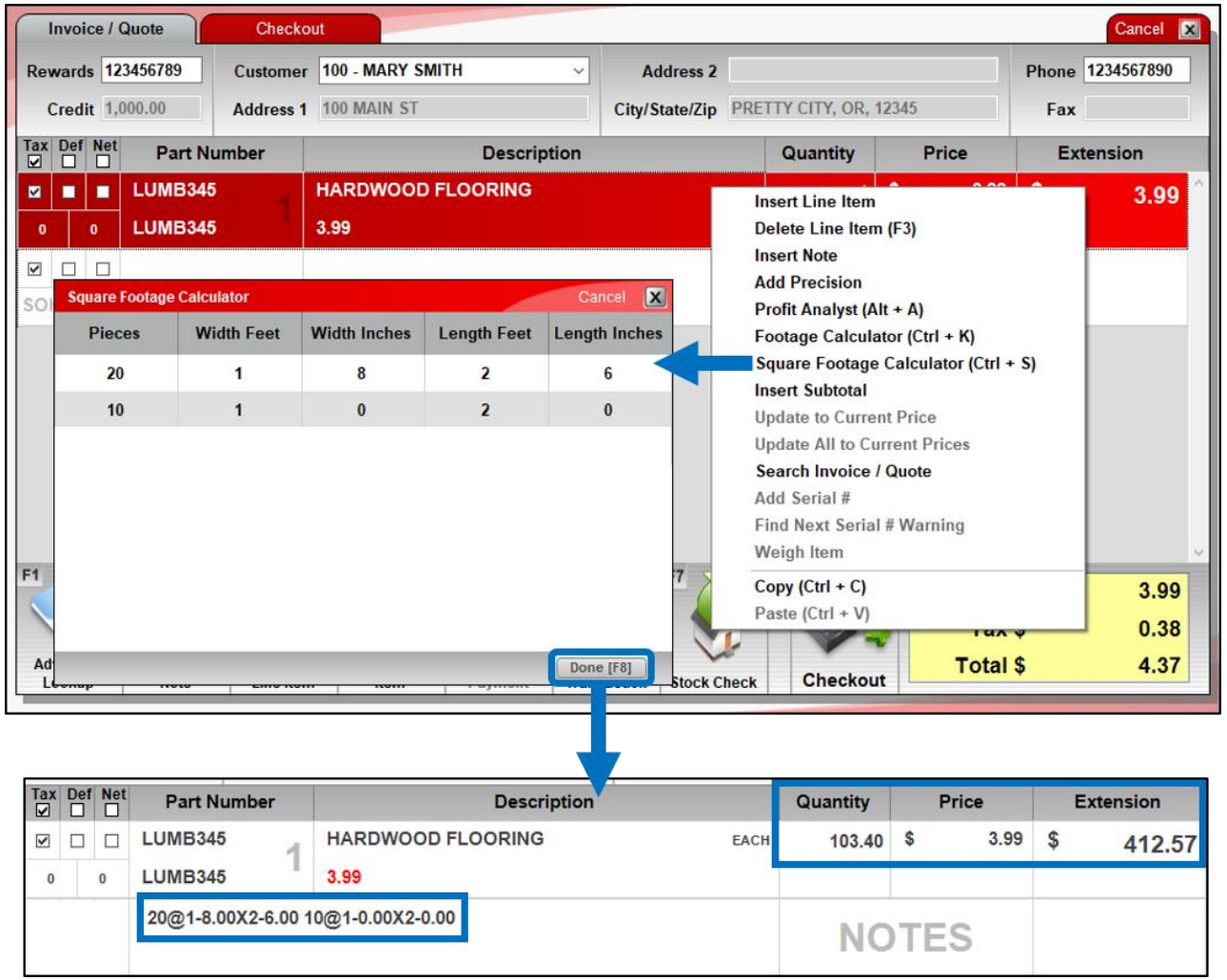
Show MBF, MSF and Ton prices on quotes/invoices



- A new inventory setting (checkbox) lets you show prices in thousand board feet (MBF), thousand square feet (MSF) or ton on invoices and quotes.
- To turn on, select the **MBF**, **MSF** or **TON** checkbox. (**Cost Per:** must be set to unit first.)

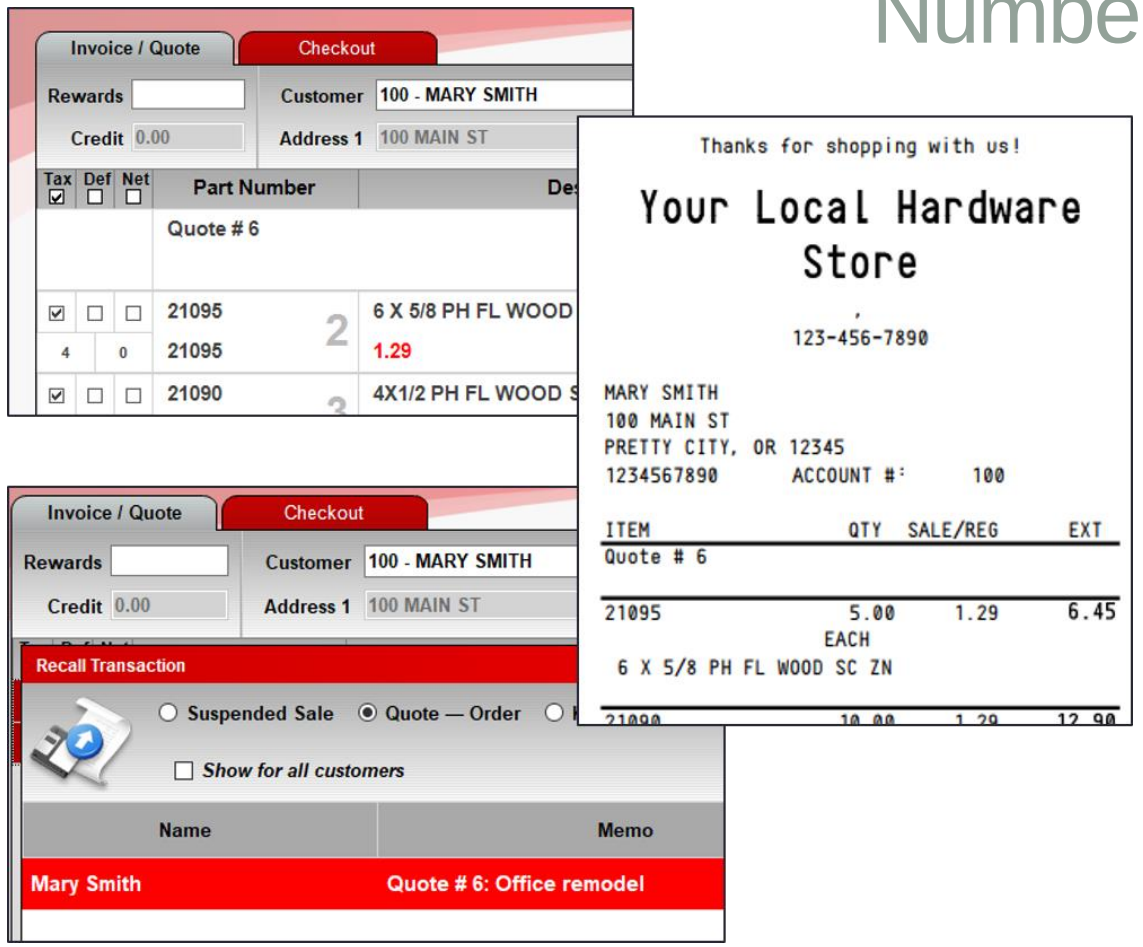


Square Footage Calculator



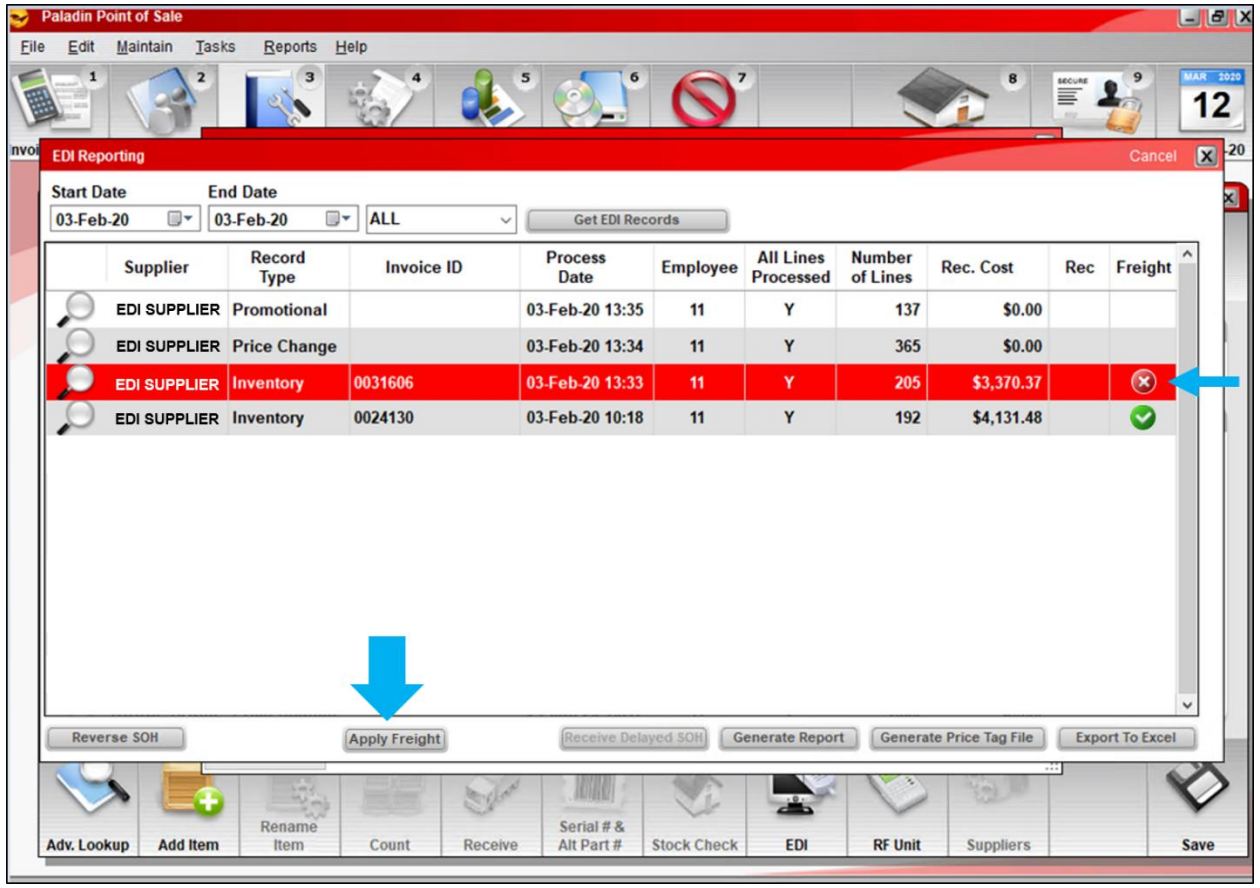
- Calculate square foot quantities for an invoice item based on dimensions (width/length) and # pieces that you enter.
- Quantities are recorded in a note.
- Right-click the item to access the calculator from the Quick Access menu or press Ctrl + S

Numbered quotes



- 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**.

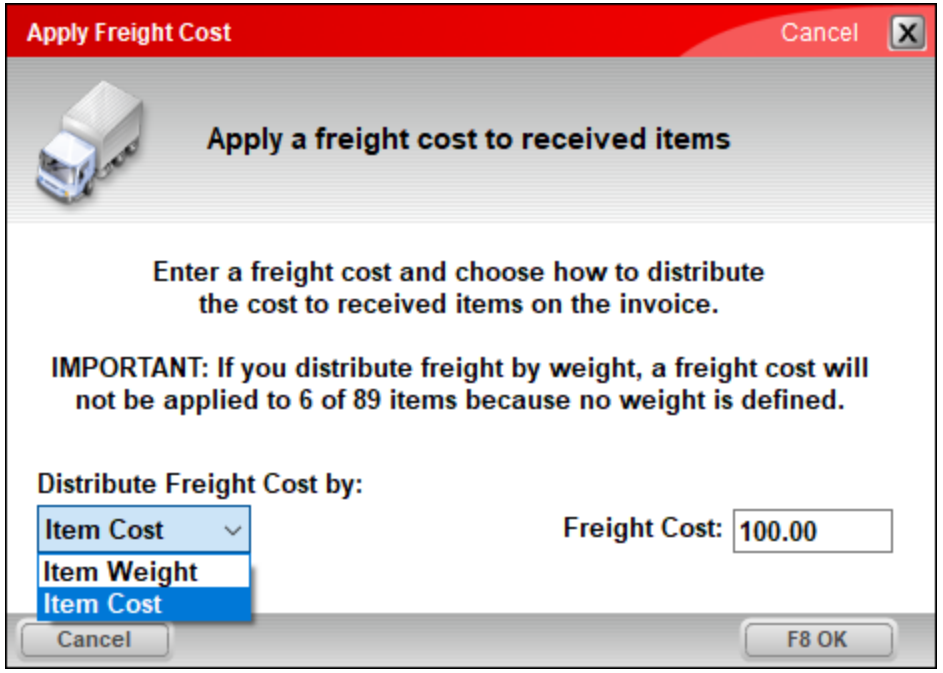
Apply freight cost to EDI invoice items



- 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 (✓).

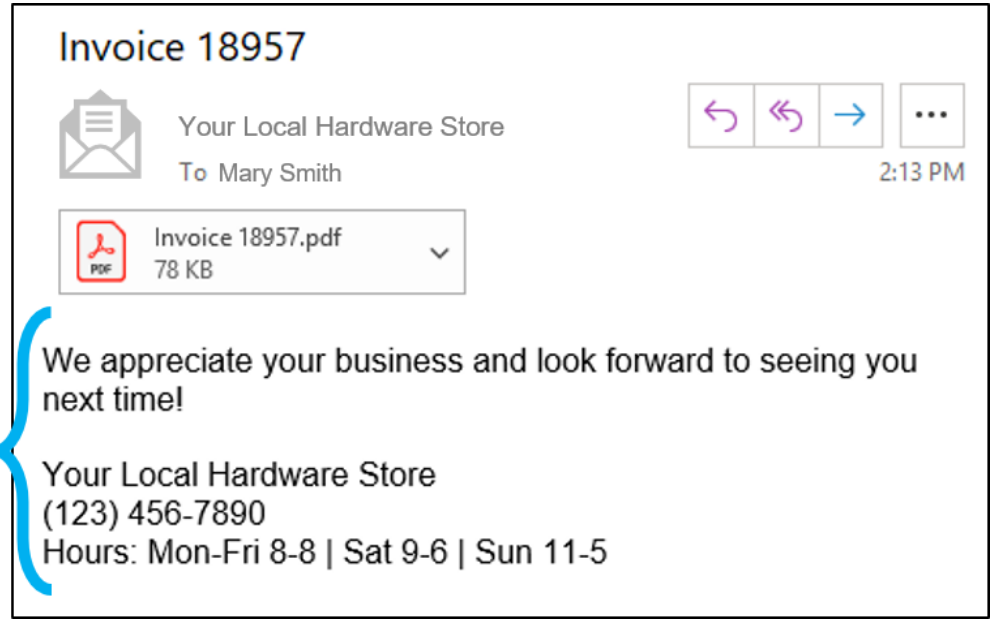
This feature is already available for manual receiving.

Apply freight cost to EDI invoice items



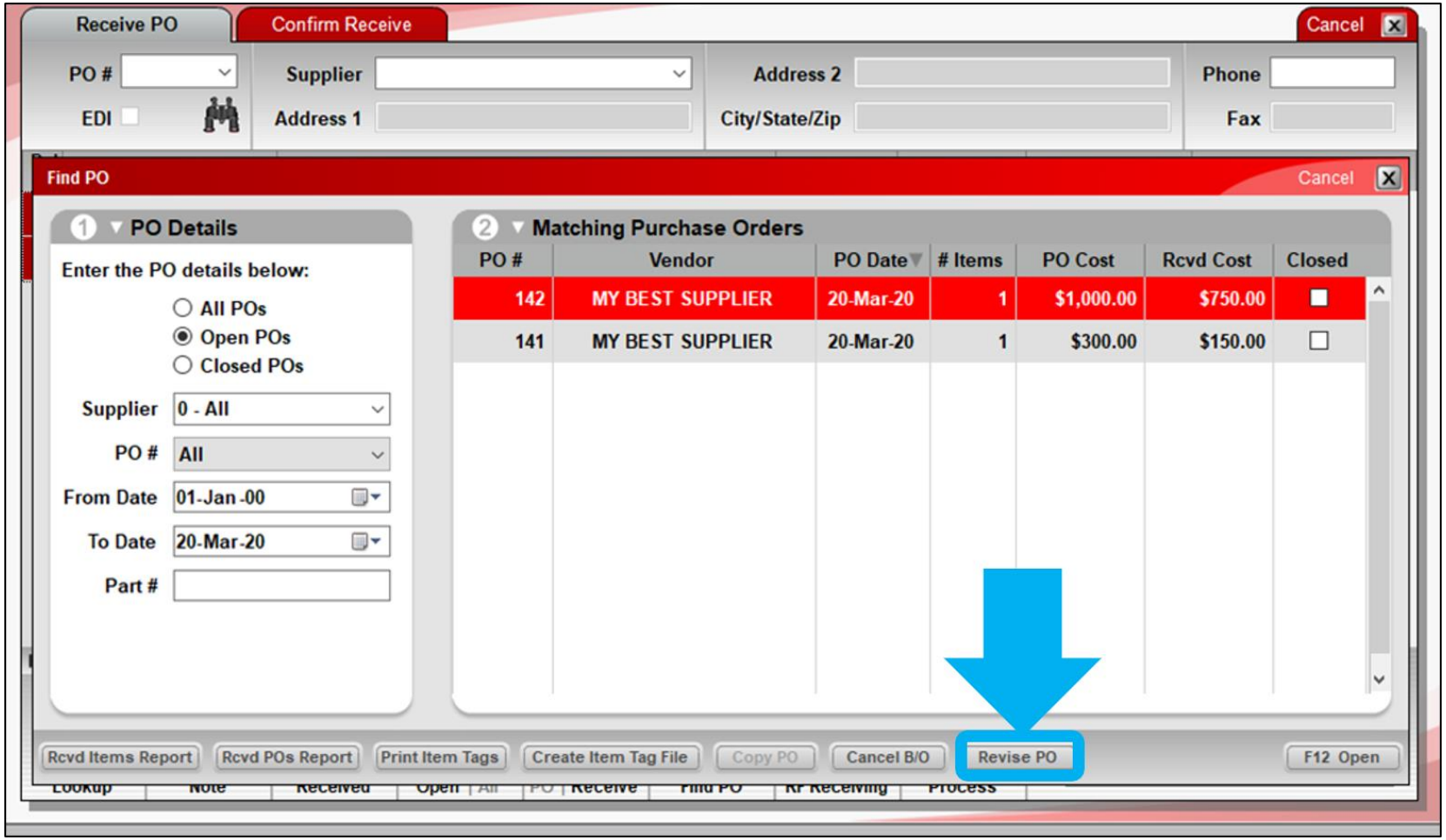
- Freight costs can be distributed by item cost or item weight.
- **Tip** It's a best practice to apply freight cost soon after the EDI invoice is processed and before received items are sold.

Customized email invoice messages



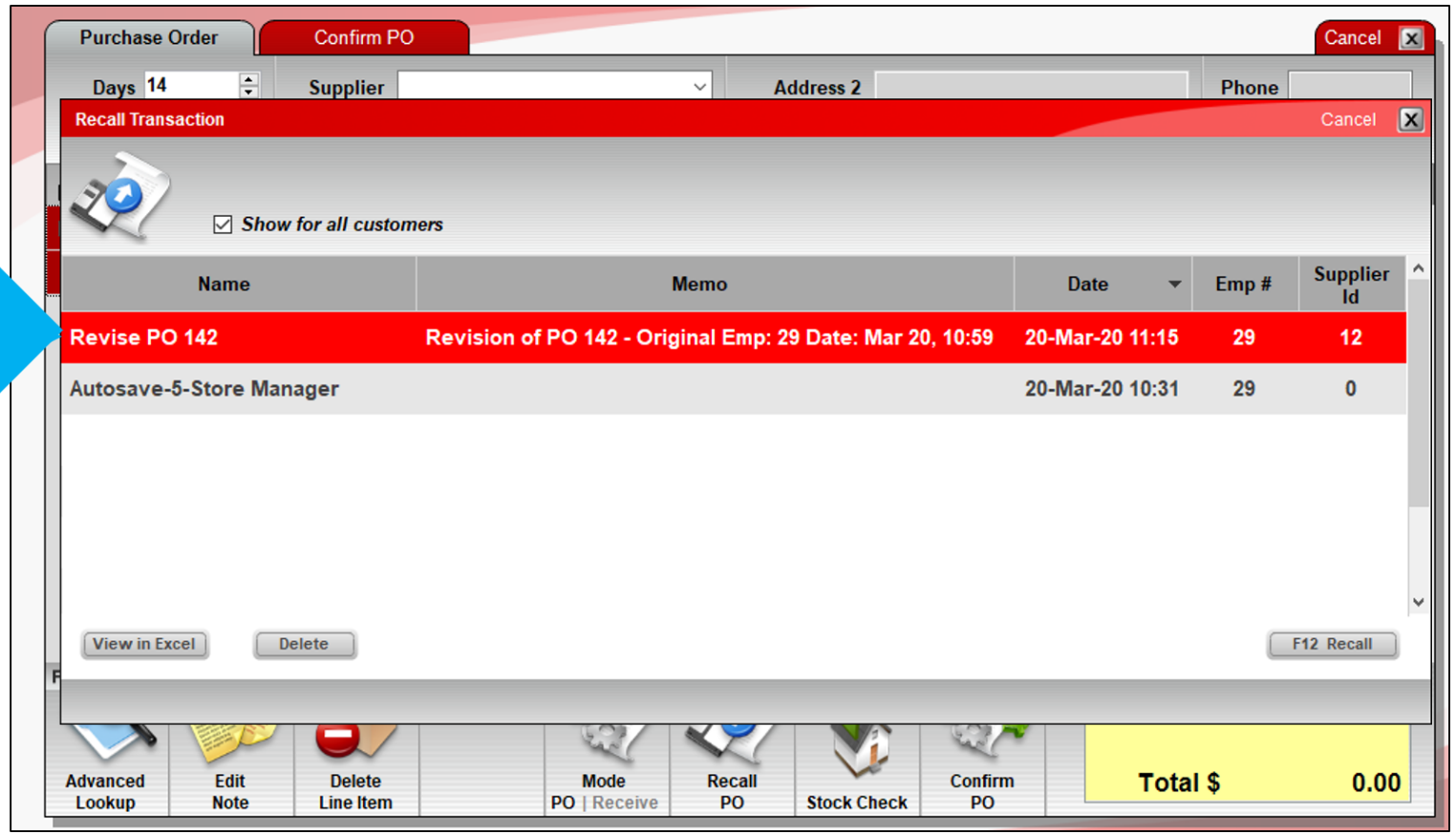
- Add custom message, your store hours, a note about upcoming promotions or other custom text when your client opts for an email invoice.
- Enter your text in **File** > **Setup** > **Forms** tab > **Email Message** box.

Create a new purchase order for backordered items



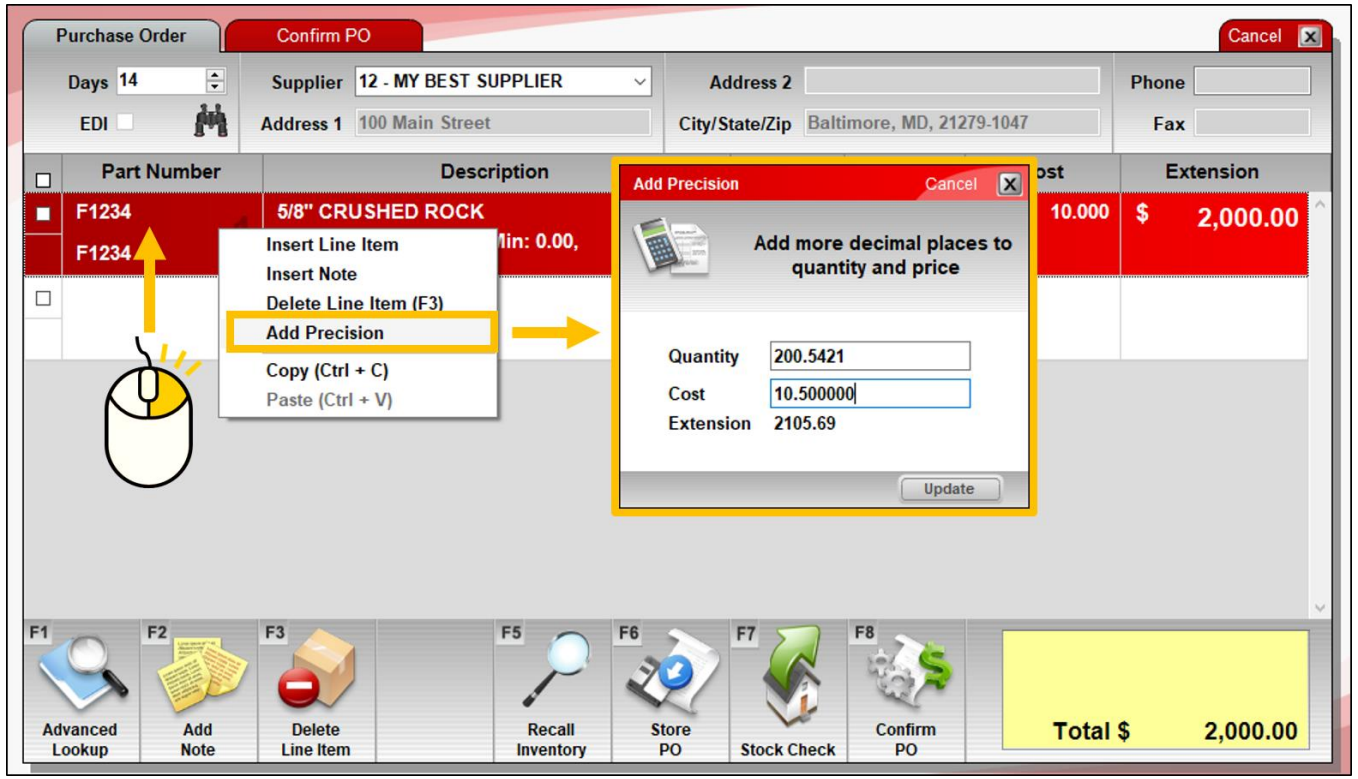
- Create a new purchase order form a PO with backordered items.
- The existing PO will be closed and a new PO created for the backordered items.
- To access this feature, use **Find PO** to locate the purchase order and then click **Revise PO.**

Create a new purchase order for backordered items



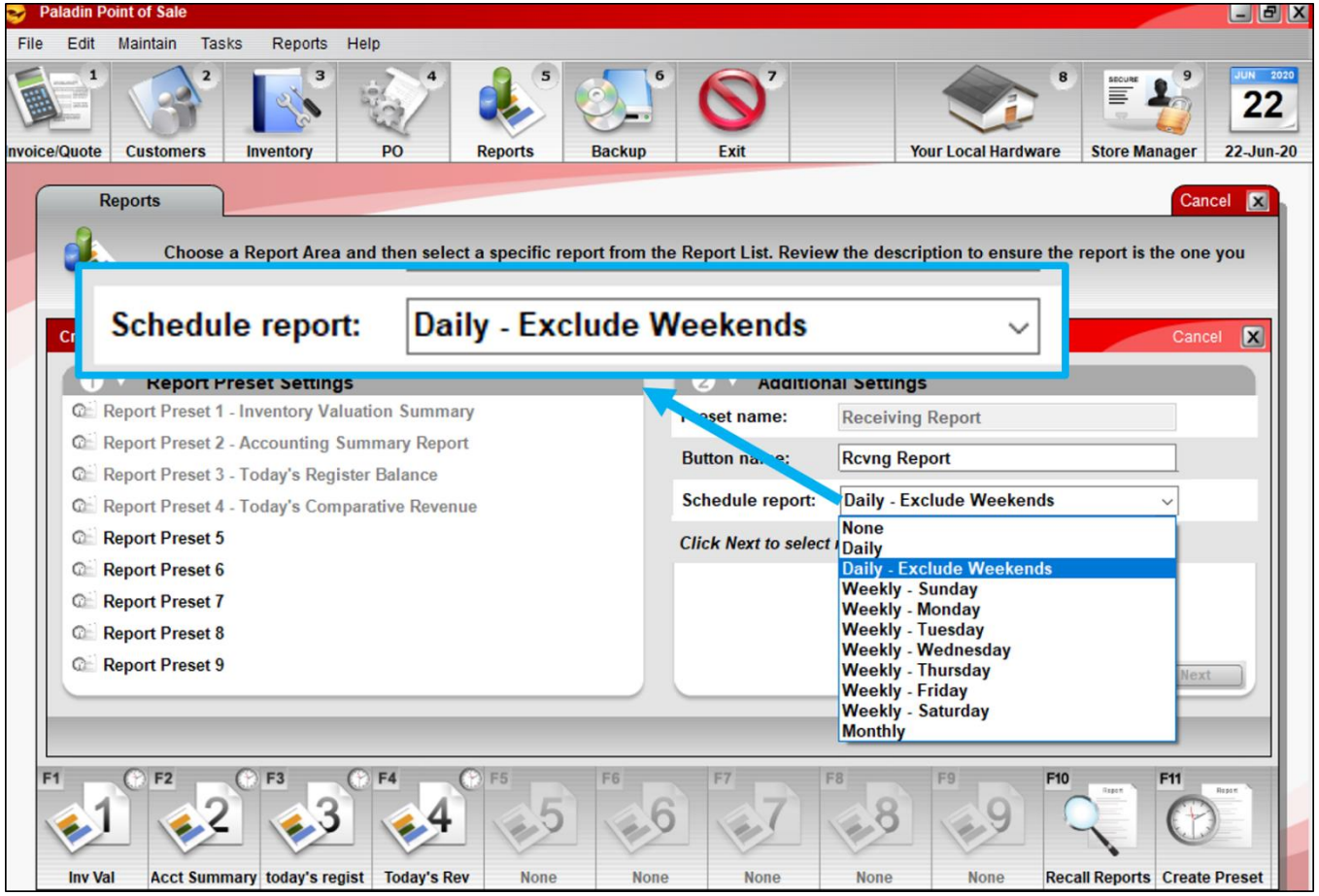
- The new PO name is prefixed with “Revise PO” and contains the prior PO’s #.
- It appears automatically in the **Recall Transaction** window.

Add precision to PO quantity and price



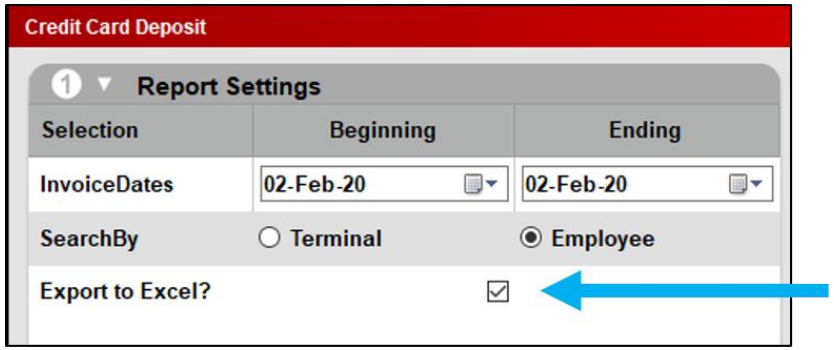
- Add decimal places to line-item quantities and prices on purchase orders.
- To add more precise values, right-click the line item and select **Add Precision** from the Quick Access menu.

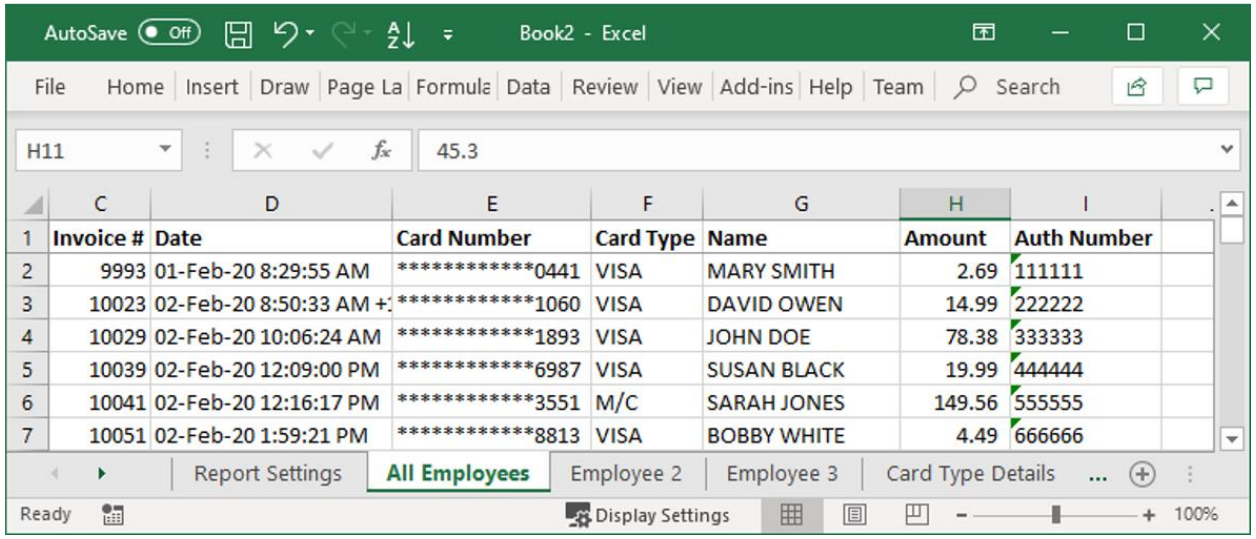
Schedule reports for weekday only



Schedule reports to run on weekdays only with a new **Daily – Exclude Weekends** option.

Excel version of the Credit Card Deposit Report

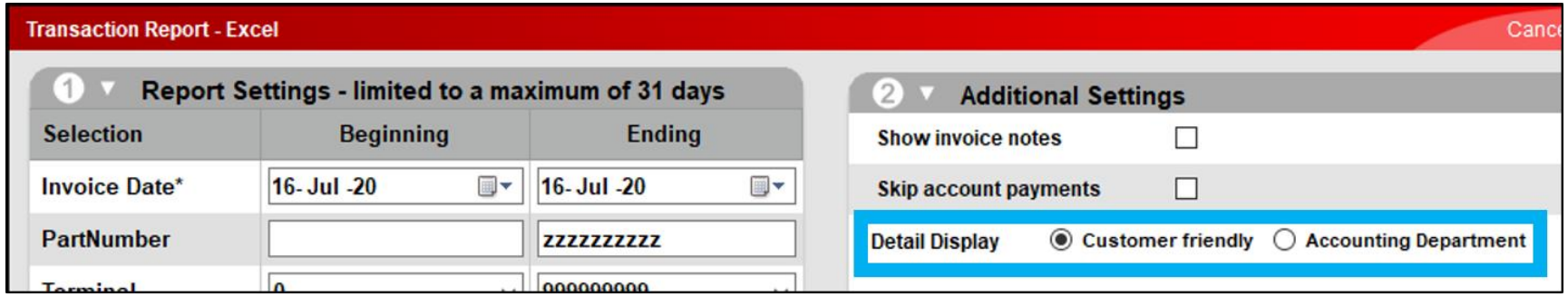




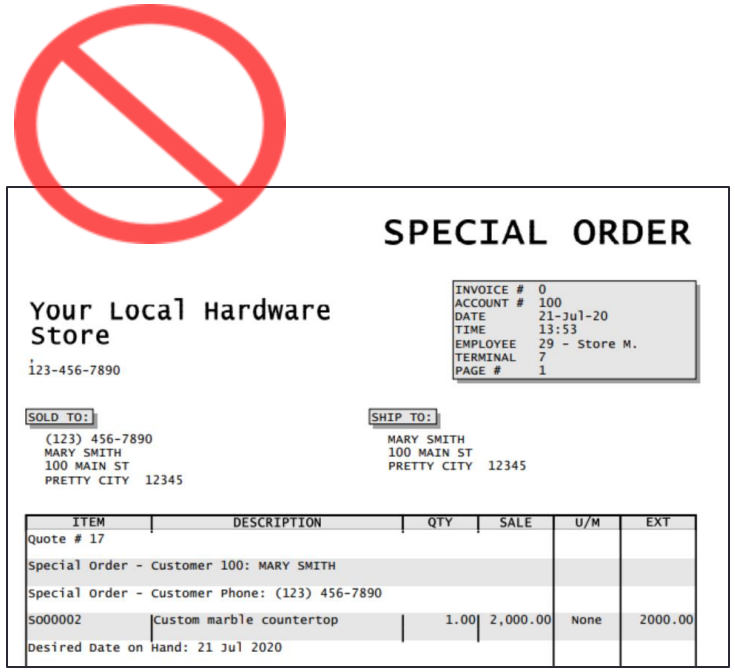
- View and analyze credit card transactions easily with a new Excel option.
- The Excel workbook includes separate worksheets (tabs) for each employee or terminal, depending on the option you choose.

"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**.



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

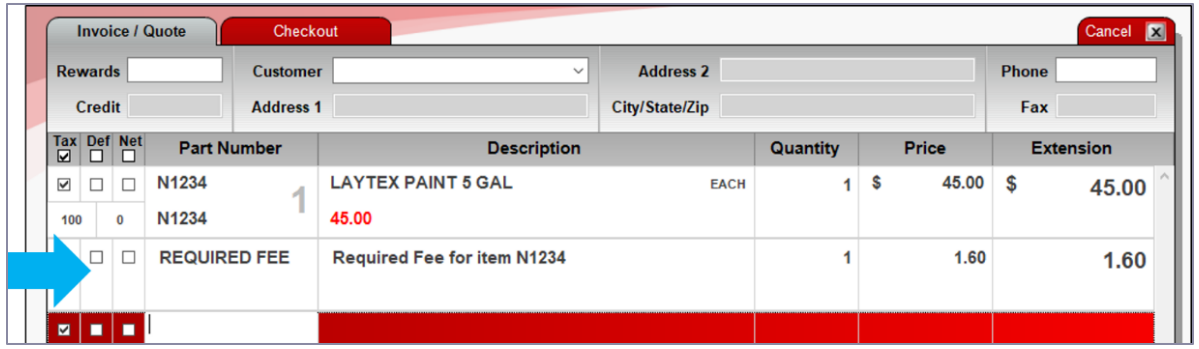
ITEM	DESCRIPTION	QTY	SALE	U/M	EXT
Quote # 17					
Special Order - Customer 100: MARY SMITH					
Special Order - Customer Phone: (123) 456-7890					
SO00002	Custom marble countertop	1.00	2,000.00	None	2000.00
Desired Date on Hand: 21 Jul 2020					

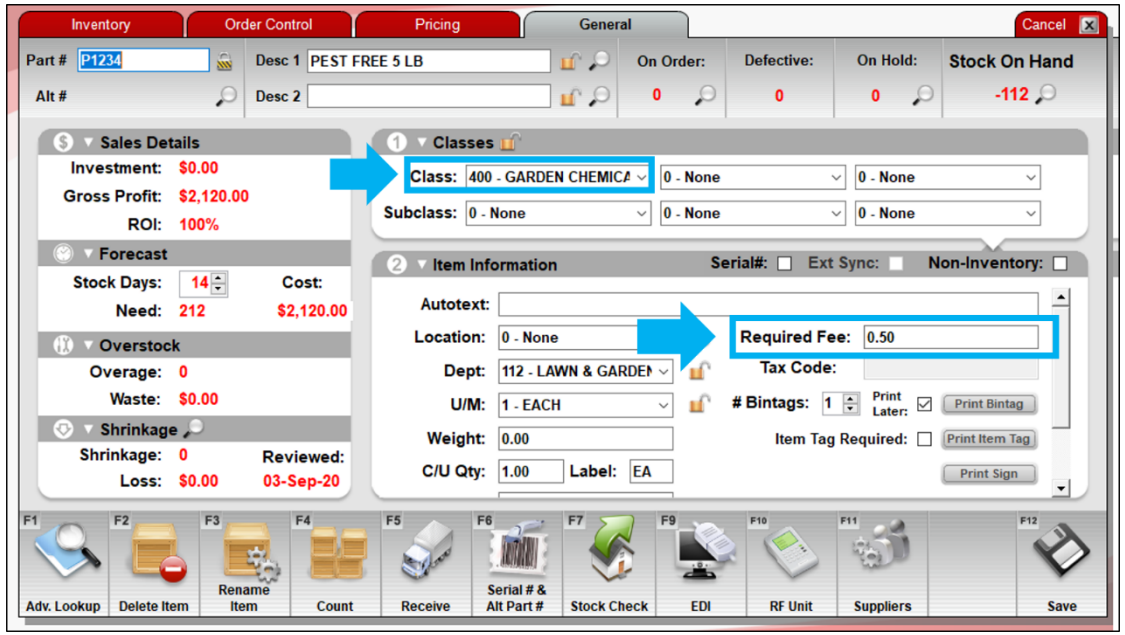
- Prevent special orders from earning rewards.
- Available for Rich Rewards or Repeat Rewards.
- Create a new no-rewards class and set **Default Class for Special Order Items** (**Company** tab) to the class ID.

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.

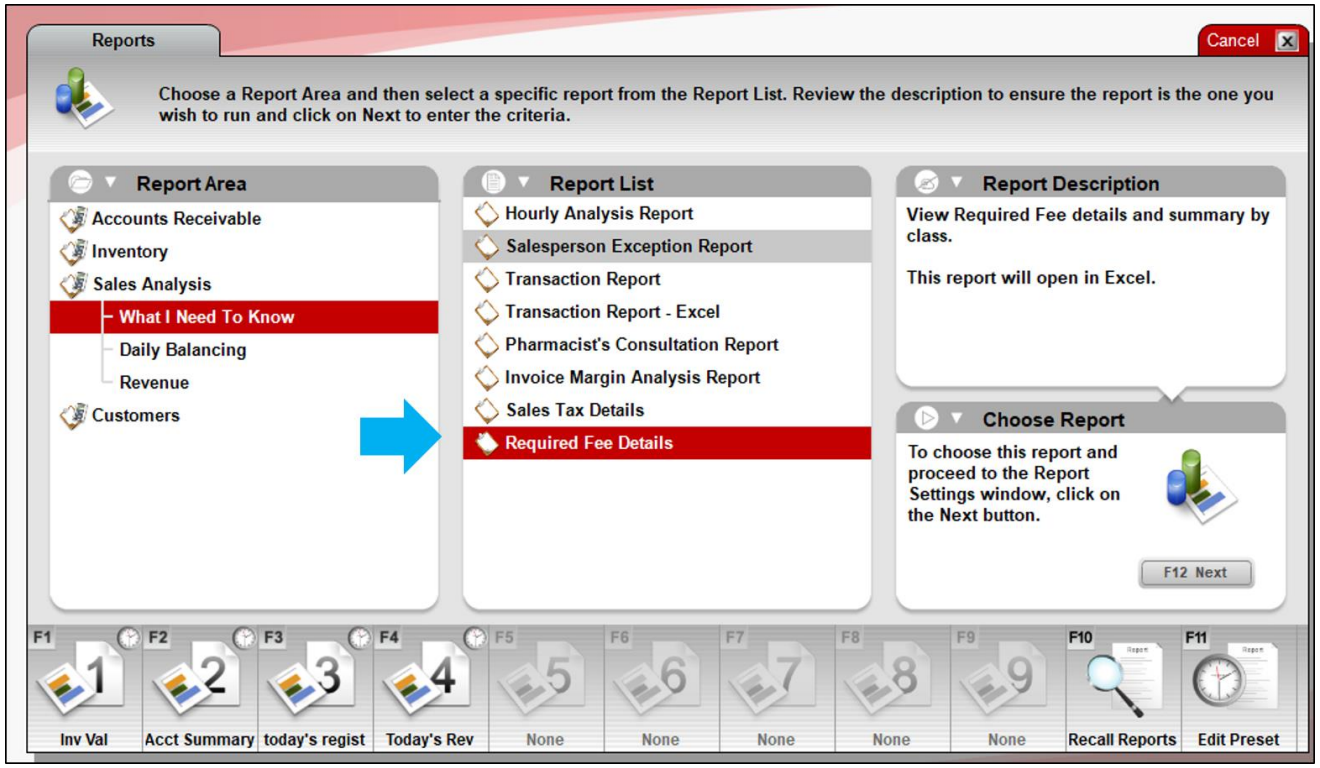
New item fee details report





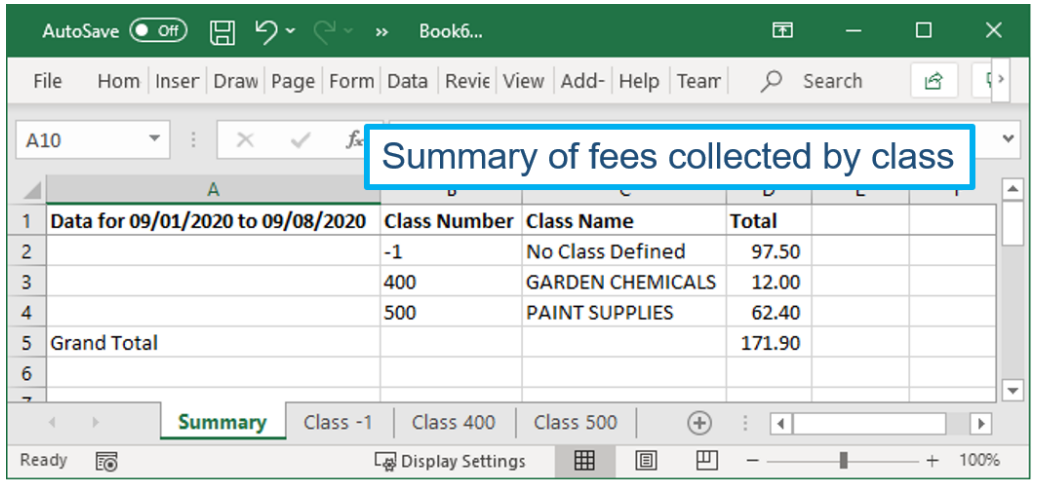
- Existing feature lets you set a fee on an inventory item that will be included at checkout.
- Set the fee on the **General** tab, in the **Item Information** pane.
- The fee name can be customized. In our example, the fee name is **Required Fee**.
- To turn on: Go to **File** > **Setup**> **Invoice(Store)** tab and select **Use Alternate Core Charge Identifier**.

New item fee details report

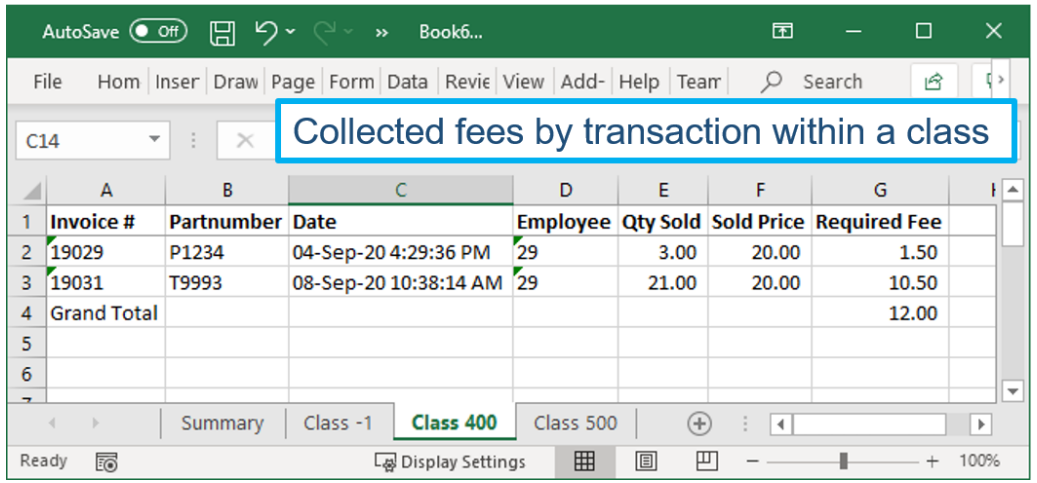


- The report is available in the **Reports** module under **Sales Analysis** > **What I Need to Know.**
- Select this report: <*Your fee name*> **Details.**
  - Example**: Required Fee Details**
- Select **Next,** select a time period and then run the report.

New item fee details report



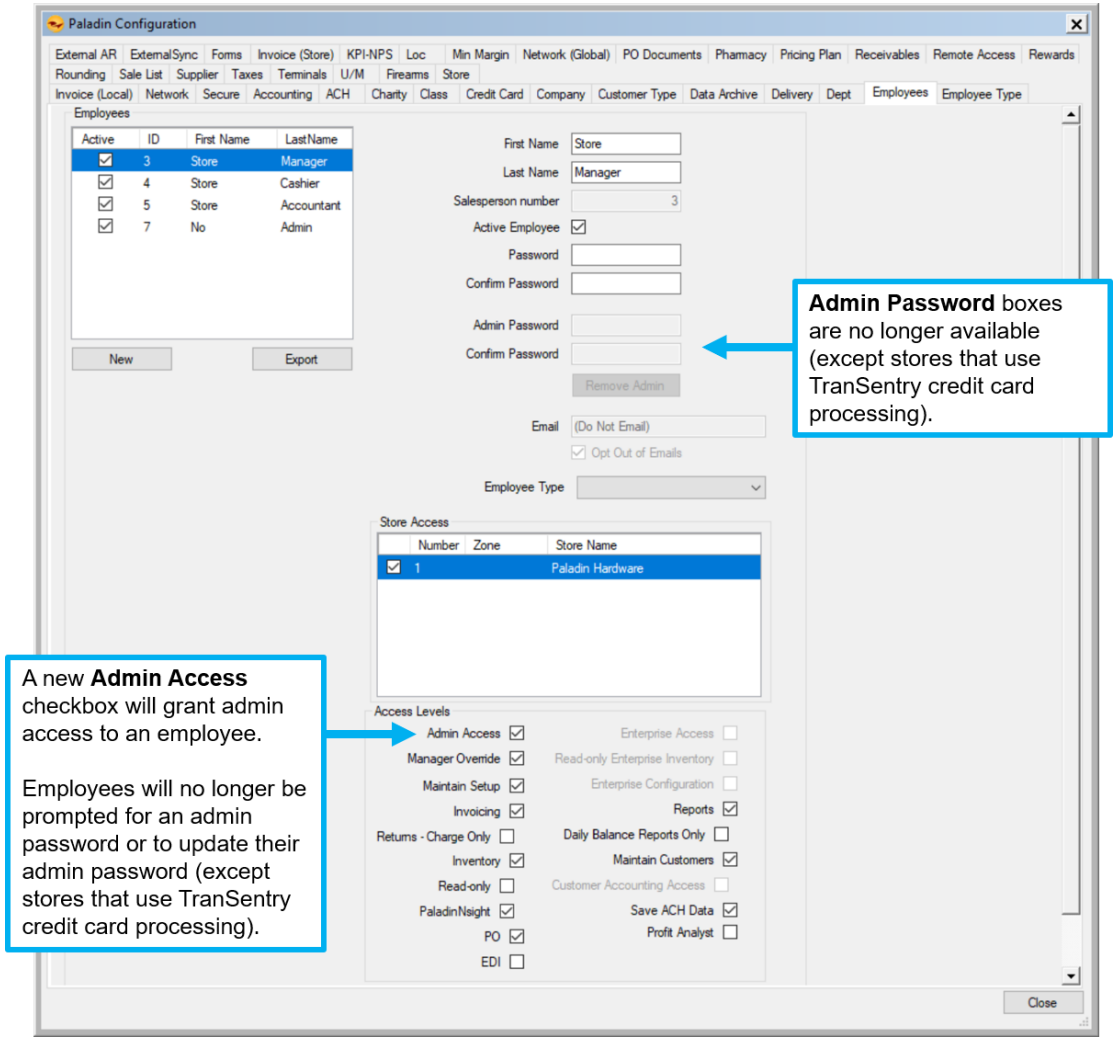
	A	Class Number	Class Name	Total
1	Data for 09/01/2020 to 09/08/2020			
2		-1	No Class Defined	97.50
3		400	GARDEN CHEMICALS	12.00
4		500	PAINT SUPPLIES	62.40
5	Grand Total			171.90
6				



	A	B	C	D	E	F	G
1	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
5							
6							

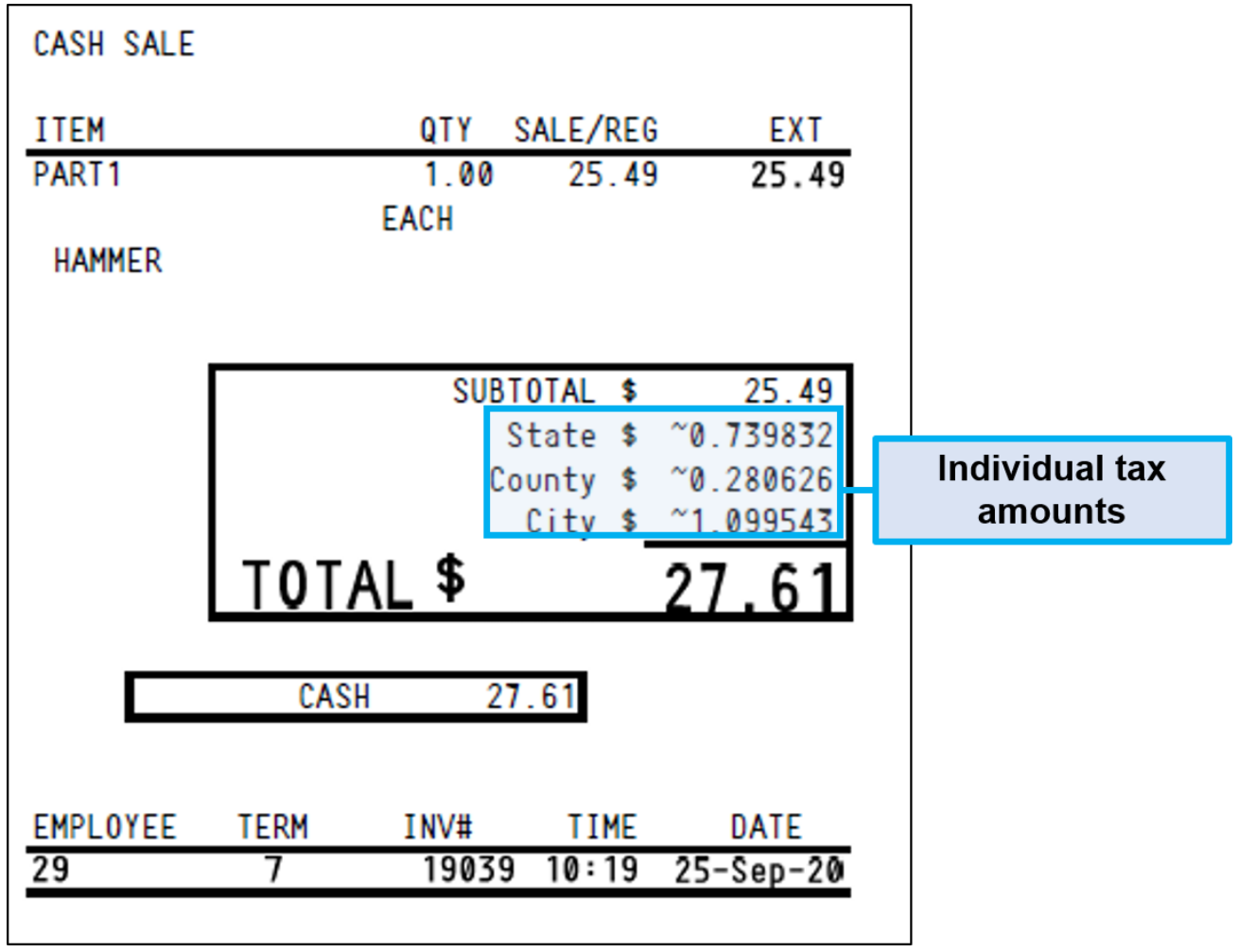
- New Excel report associates the item fees with the item's class and provides:
  - A summary of fee totals by item class.
  - A list of collected fees in each class with transaction details.
- Best Practice: Make sure all items with fees are assigned to a class.
- Fees for items with no class assigned are grouped together in 'no class' category.

New Admin Access level replaces Admin passwords



- 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.

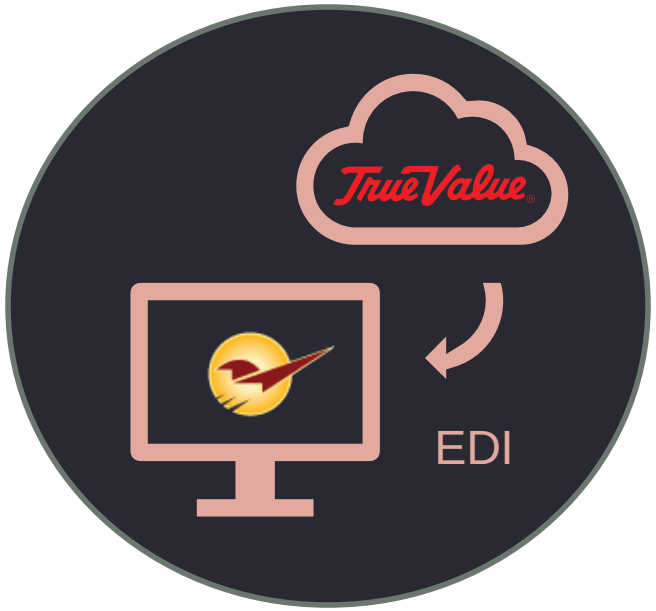
Itemized taxes on receipts



- 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.

New True Value features

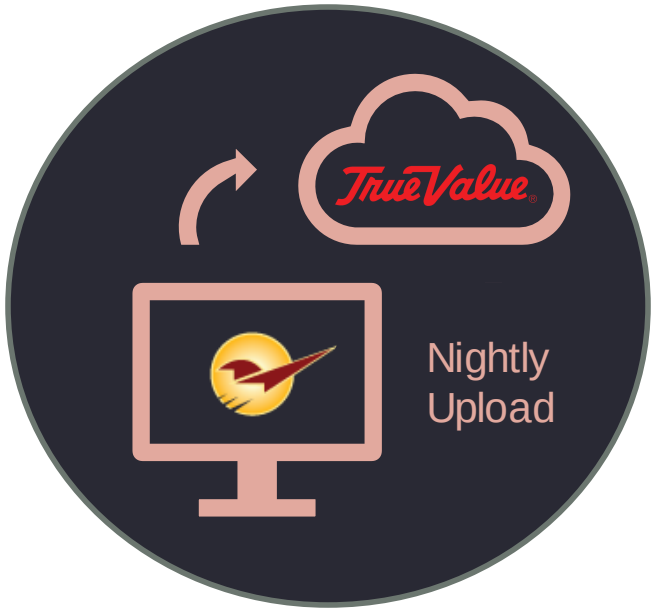
Enhanced True Value EDI file support



Paladin EDI can now process these True Value files:

- **Fineline Updates** – Updates True Value finelines (weekly).
- **Long Descriptions** – Adds True Value long product descriptions into the Description 3 field in Paladin (**General** tab > **Item Information** pane) for new and updated items (weekly).
- **Images** – Imports product images into Paladin for new and updated items. When available, product images can be viewed in the **Advanced Lookup** window (weekly).
- **Drop Ship** – Process drop ship invoices (daily).
- **RDC Balances** – Update remote stock check data (daily).
- **Vendor Locations** – Update vendor locations (weekly).
- **Vendor Direct Ship Terms** – Process vendor shipment data (daily M-F).

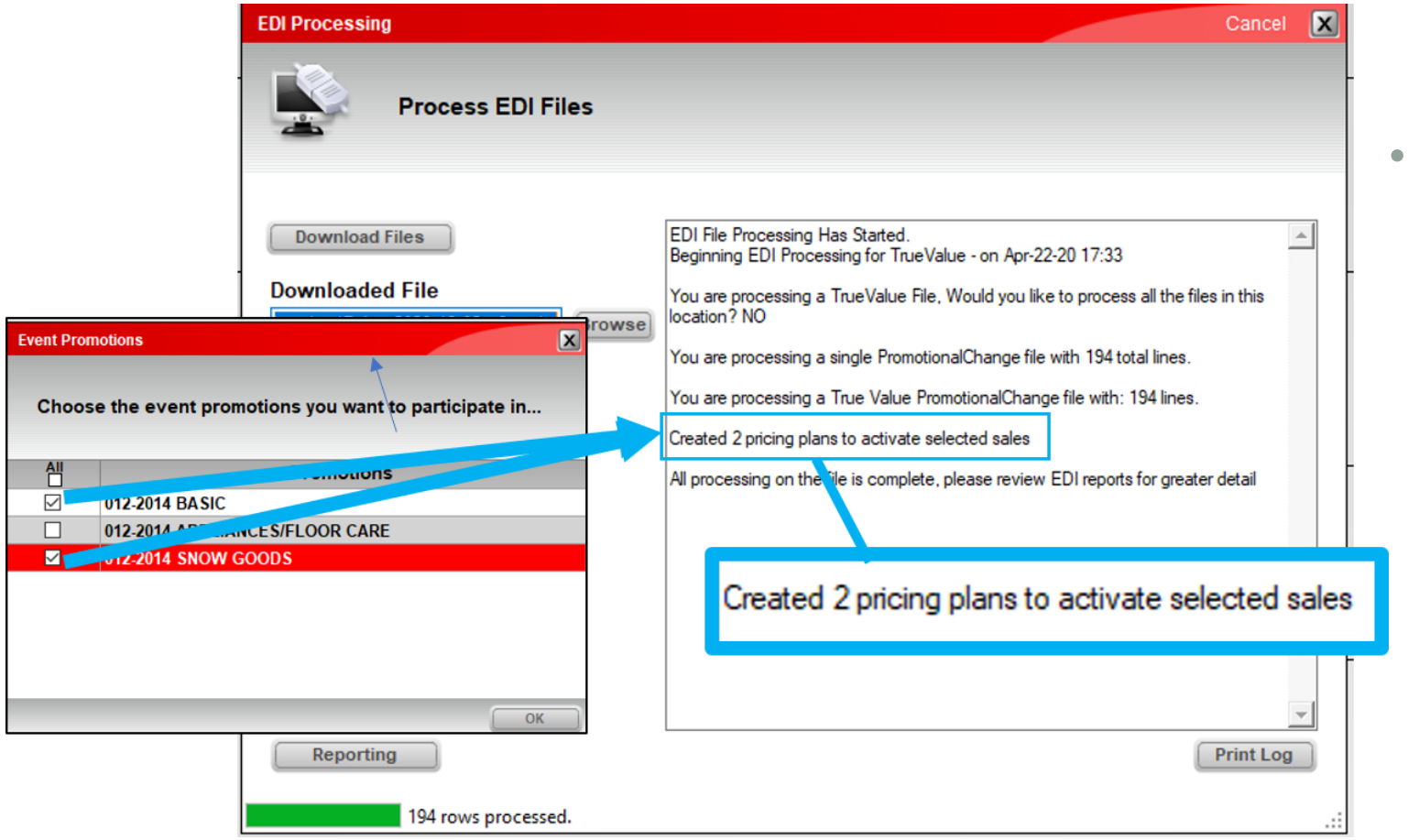
Daily pricing and inventory uploads to True Value



- Paladin has added support for daily (end-of-day) pricing and inventory uploads to True Value for both non-True Value and True Value products.
- If you want to enable this feature, create a Help Request and Paladin Support will contact you.

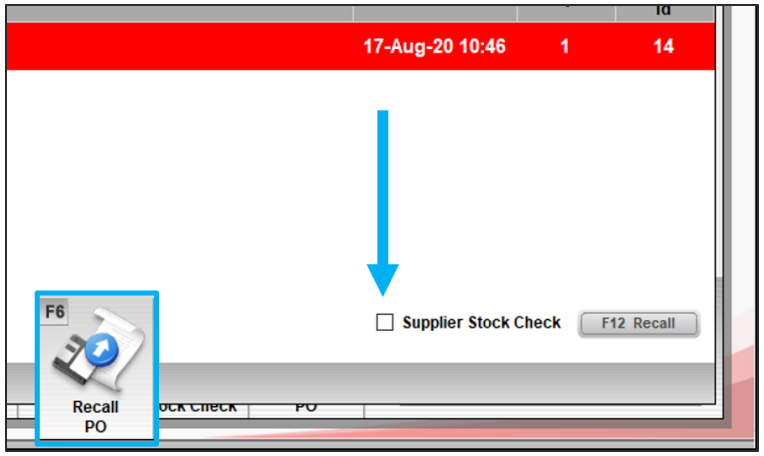
In Paladin, go to **Help** > **Support** > **Submit a Help Request**

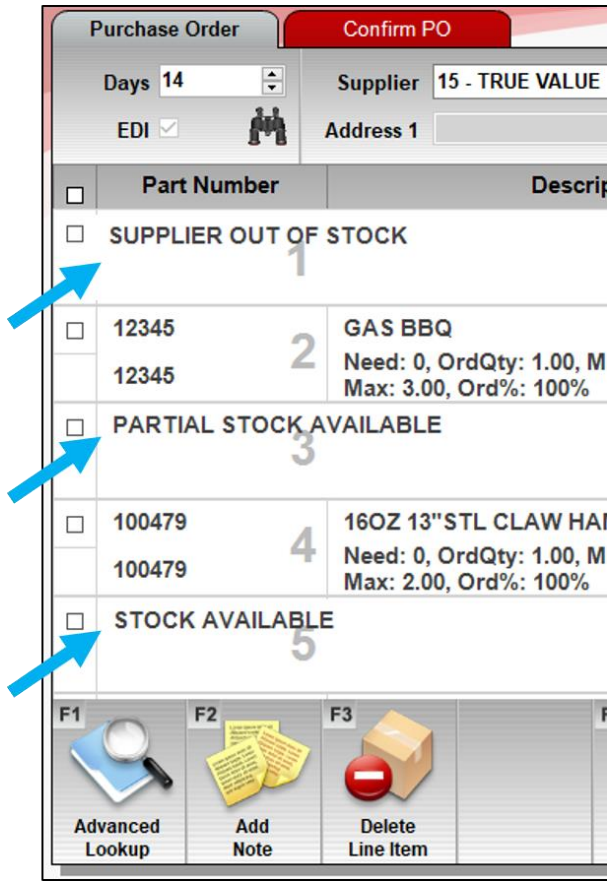
True Value automated pricing plans



- When you run True Value EDI and select the sales you want to participate in, Paladin will automatically create the pricing plan.

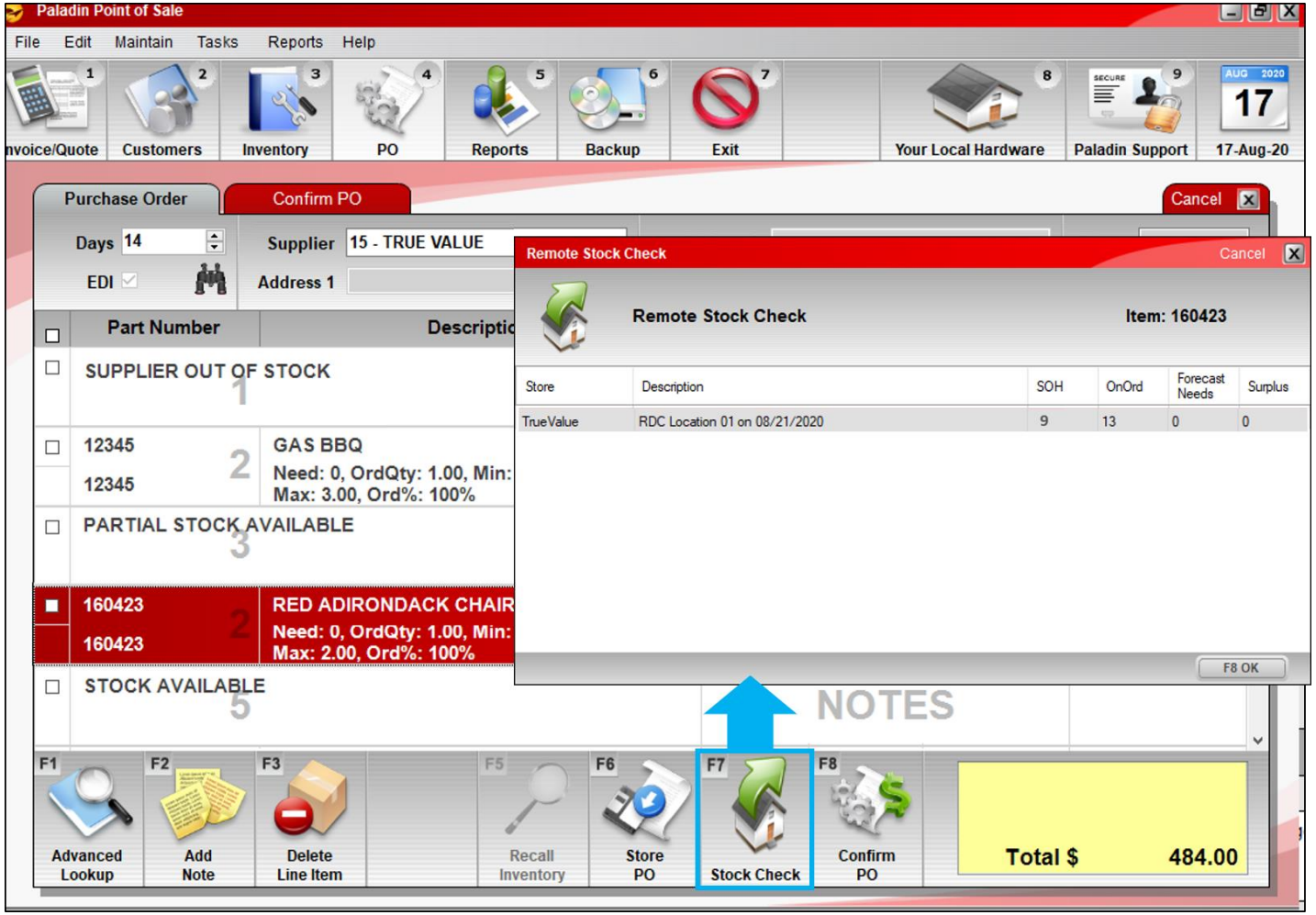
True Value RDC availability for POs





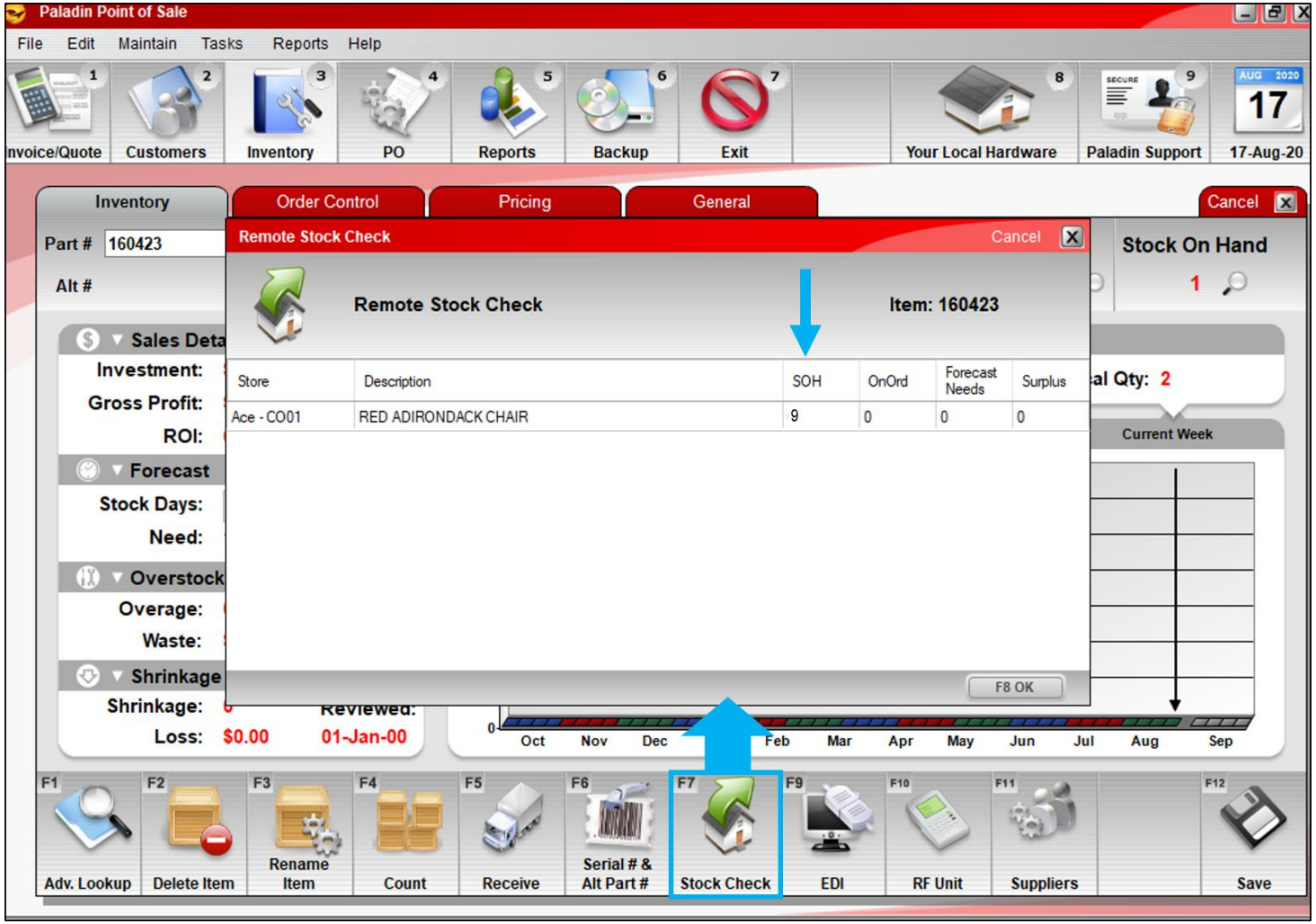
- Automatically sort purchase order items by Regional Distribution Center (RDC) availability.
- Items are divided into these categories:
  - SUPPLIER OUT OF STOCK
  - PARTIAL STOCK AVAILABLE
  - STOCK AVAILABLE
- To sort your PO, in the **Recall PO** window, select the PO, and then select the **Supplier Stock Check** checkbox before you click **Recall** (F12).

True Value RDC Stock on Hand for PO items



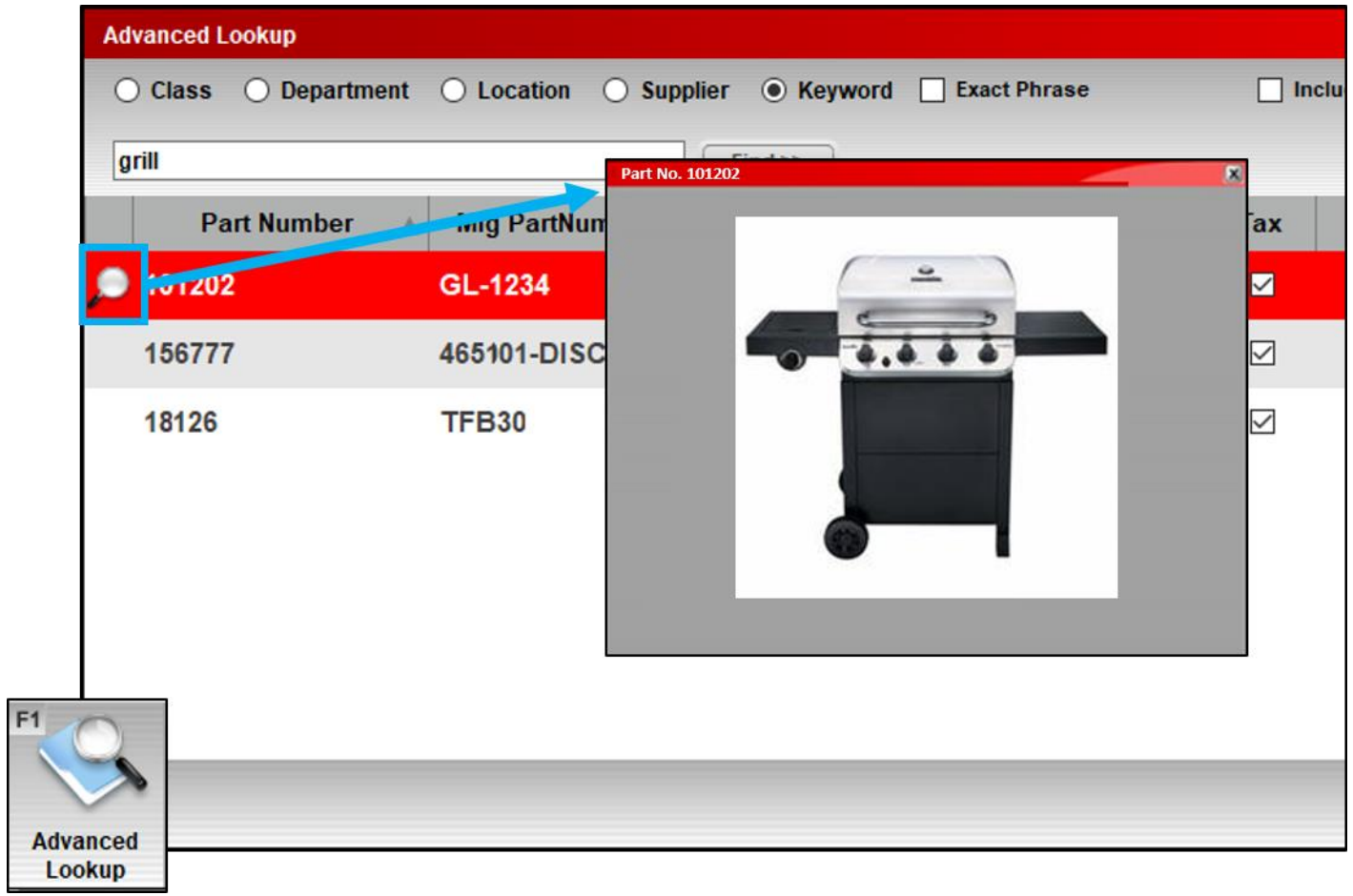
- View RDC stock on hand for purchase order (PO) items.
- Select a PO item and click **Stock Check** | **Transfer** (multi-store) or press F7.
  - **Note**: RDC availability and SOH is updated by processing the RDC Balances EDI file with a specified RDC ID.

True Value RDC Stock on Hand for inventory items



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

True Value product image viewer in Advanced Lookup

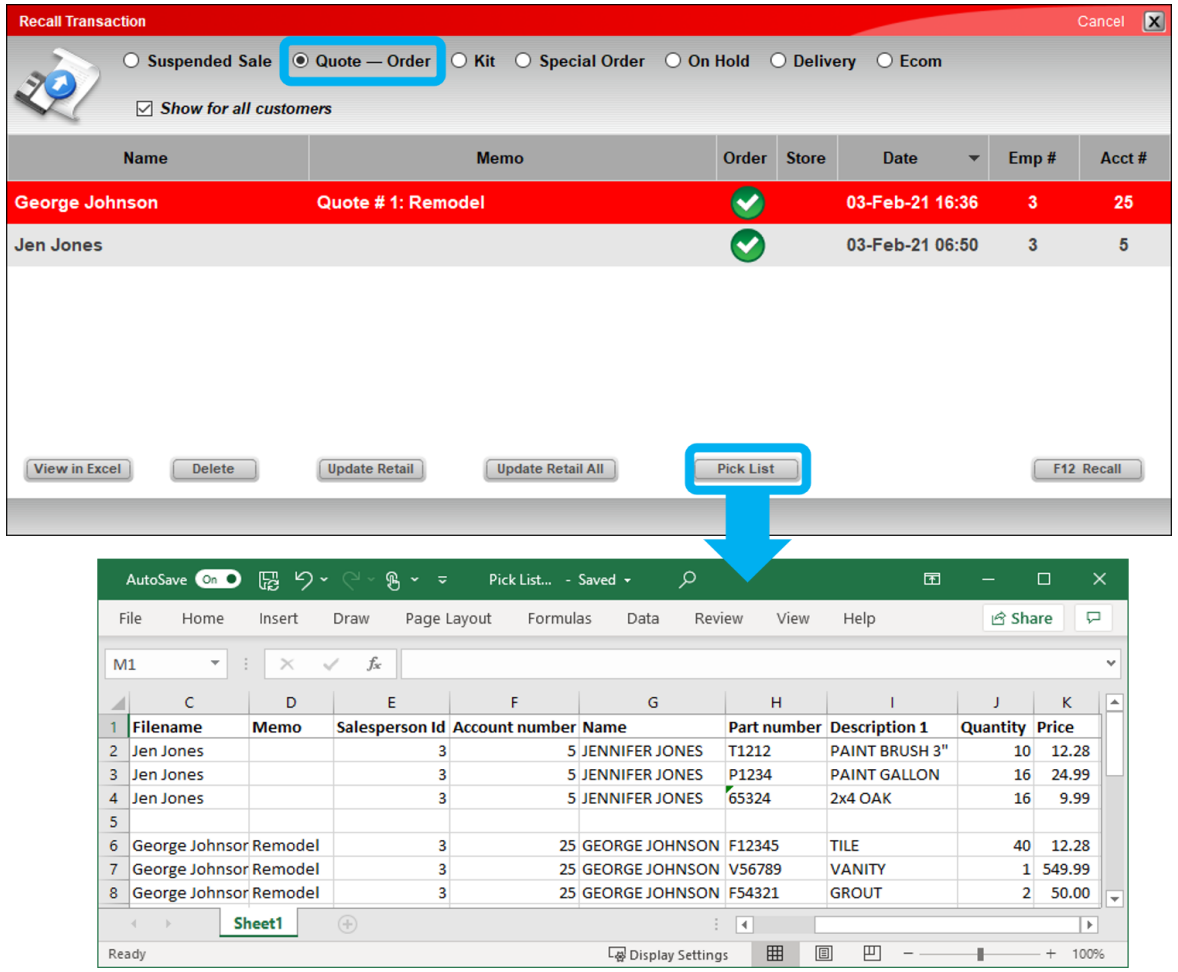


- In the **Advanced Lookup** window, a magnifying glass will open a product image (when available).
- Product images are added during EDI processing and will increase in number over time.

New point of sale features coming soon

Release 2021 - A

Coming Soon – Pick List Report



- Show outstanding (unsold) items on orders, sorted by order.
- Useful for fulfillment

For additional details, view the

2020 Release Guide

portal.paladinpos.com/new-features/summer-2020

Q&A

Next Webinar:

Avalara: 2021 Sales Tax Update

March 9 @ 9am PT

Register: **portal.paladinpos.com/webinars**

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