



## **Fall Virtual User Meeting**

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#### • Our 2021 releases include:

- Pick List
- Auto-delete quotes
- Mobile2 Skip Signature
- Transaction Report with Rewards IDs
- Charge Customer Email Utility
- Returns Charge Only
- Collect on Delivery option
- Send purchase orders to any email address
- Show location-specific QR codes on receipts
- Advanced Lookup for customer ACH data



# WHAT YOU'LL LEARN

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



## 2021 New Features



### **Pick List Report**

Rewards	Customer		Address 2			Phone	
Credit	Address 1		City/State/Zip			Fax	
Recall Transaction							Cancel 🔀
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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.

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#### 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

MOBILE	S	IGNATURI	E	
Signature				
Please sign below				
O Clear			✓ Skip Signature	✓ Accept

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

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 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



- 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.



Store Access	Company Customer Type Data Archive	Delivery	Dept Emplo
Number Zone	Store Name	1	
☑ 1	Paladin Hardware		
Access Levels			
Admin Access 🔽	Enterprise Access		
Manager Override 🔽	Read-only Enterprise Inventory		
Maintain Setup 🗹	Enterprise Configuration		
Invoicing 🗹	Reports 🔽		
Returns - Charge Only	Daily Balance Reports Only		
Inventory 🗹	Maintain Customers		
Read-only	Customer Accounting Access		
and the second	Save ACH Data 🔽		
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## Returns – Charge Only

- Returns Charge Only employee access level has been added.
- Allows an employee to refund a return as a store credit using the Charge payment type ONLY.
- Return requirements:
  - To receive credit, the customer must have a non-zero credit limit with the store.
  - The original transaction can be any payment type (cash, check, etc.)
- Select on File > Setup > Employees tab.
- Employee must have **Invoicing** access.



### **Collect on Delivery**



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



#### Email Purchase Orders to Any Address

- Email a purchase order to the supplier address on file or any other email addresses. Select or enter an email address and click Send.
- If there is no address on file, it will save the first manually-entered address. Otherwise, additional email addresses are not saved.
- Optional: Specify a return email address for emailed POs only. (Contact Paladin Support to set up.)





### Multi-store: Individual QR Codes for Each Store



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



#### Advanced Lookup Searches Customer ACH Data



- JOHN	I SMITH ~	Address 2	
		City My C	ity
	🔗 🔻 ACH Check		
VS:	Name on check: John	Smith	]
	Account number: 1111	1111111	]
	Routing number: 3250	81403	]
	Custom addenda: My L	ocal Hardware Store	]
	Consumer Account	Savings Account	ב
a		Scan Cher	10



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



### Description 3 Now in Advanced Lookup Keyword Search

1.00	Inventory Order Contro	I Pricing	Genera	al .			Cancel
	Part # Desc 1		шы	On Order:	Defective:	On Hold:	Stock On Hand
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- 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 <u>Volusion</u>.



#### Exclude Description 2 from customer receipts



- A new setting Block Description 2 from Invoice and Reprints – will prevent this secondary description from appearing on the customer's receipt.
- The Display Description 2 in Invoice/Quote setting must be selected for this new setting to apply, and description 2 will continue to appear to the cashier on invoices in the Invoice/Quote module.
- To access these settings, on the File menu, click Setup, and then click Invoice (Store) tab.



#### GL Summary: New Categories for Rich Rewards



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



#### Simplified Tax Holiday Sales and Accounting



- A tax holiday is a time period during which some items are sold tax-free or partially tax-free.
- Our tax holiday feature allows stores to apply tax holiday discounts quickly and easily at checkout using the quick access (right-click) menu or by pressing Ctrl + T.



### Insufficient SOH (Oversold) Alert



- In the Invoice/Quote module, when you enter a quantity greater than your current SOH, a message appears with options:
  - Click **OK** or press F8 to adjust the invoice quantity to current SOH.
  - Click Cancel to accept the entered quantity.
- Message does not appear for noninventory (dump SKU) items.
- Optional: Only check items in a specified location range.



#### **Benjamin Moore Program Reports**

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- 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.

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### New Item and Bin Tags



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



#### Incremental Part Numbers for Added Inventory

	To create a new inventory item, complete the in below and click or press the "Add" button.	nformation
Part #:	12345 * Alt Part #: X00005	Next X #
Description:	SUPER GLUE	*
Cost:	5 Sell Price: 12	*
SOH:	0 * Department: 10 - Tools	~ *
		F12 Add

- 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								
• A	ctive 🔿 Inac	tive	All	~		Name	Memorial Day	Sale
ID	Name			Source	Туре	ID		1
1	Memorial Day Sale				Normal			
2	Labor Day Sale				Normal	Source		
						Туре	Normal	~
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3		173234	2.99			
4		232341	19.99			
5		544329	25.89			
6		232432	15.49			
7		982349	4.59			1
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- A new Export Sale List feature lets you export sale item part numbers and prices into a tab-delimited text file that can be opened in Excel.
- From there, you can edit items and prices and re-import to update the sale or add to a new sale.
- Access from File > Setup > Sale
   List tab. Click Edit and then click
   Export.



#### **Accounting Integrations Updates**







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



#### Capital One Trade Credit Rebranding



- A few years ago, Paladin partnered with BlueTarp, now Capital One Trade Credit, to integrate with its third-party financial service designed to protect businesses from credit risk.
- We've updated our interface to reflect the new Capital One Trade Credit brand. Otherwise, nothing about the integration has changed.



#### Limit customer types to those that you create



Electronic		Cancel
Address 2	]	State TN ~
City Pretty C	ity	Zip 99999
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	Number	Туре
Savings account		
Scan Check		Edit ID Data
Child Name	Customer Type	~
Child Name		Custom Type 1 Custom Type 2
		Custom Type 3
Edit		
F7 504 F8	F9 -1	F12
	<u>i 💴 📩</u>	
Adjust	View Past	
	Electronic Address 2 City Pretty C City Pretty C Savings account Savings account Child Name Edit F7 F8 Adjust	Electronic  Address 2  City Pretty City  City Pretty City  Alternate Cu Number  Savings account  Scan Check  Ints  Customer Type  Edit  F7  F8  F9  View Past  View Past

- Hide default customer types and only show those that you create for your store with a new setting.
- Customer types let you categorize customers and provide business statistics by type in reports, such as the Transaction Report and Comparative Revenue Report.
- To apply this setting, on the File menu, click Setup, click the Customer Type tab and select Hide default types from dropdowns. Then, click Save.



#### Learn more

Paladin 2021-A Release GuidePaladin 2021-B Release GuidePaladin 2021-C Release GuidePaladin 2021-D Release Guide

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