



What's New in Paladin: The 2021-A Release

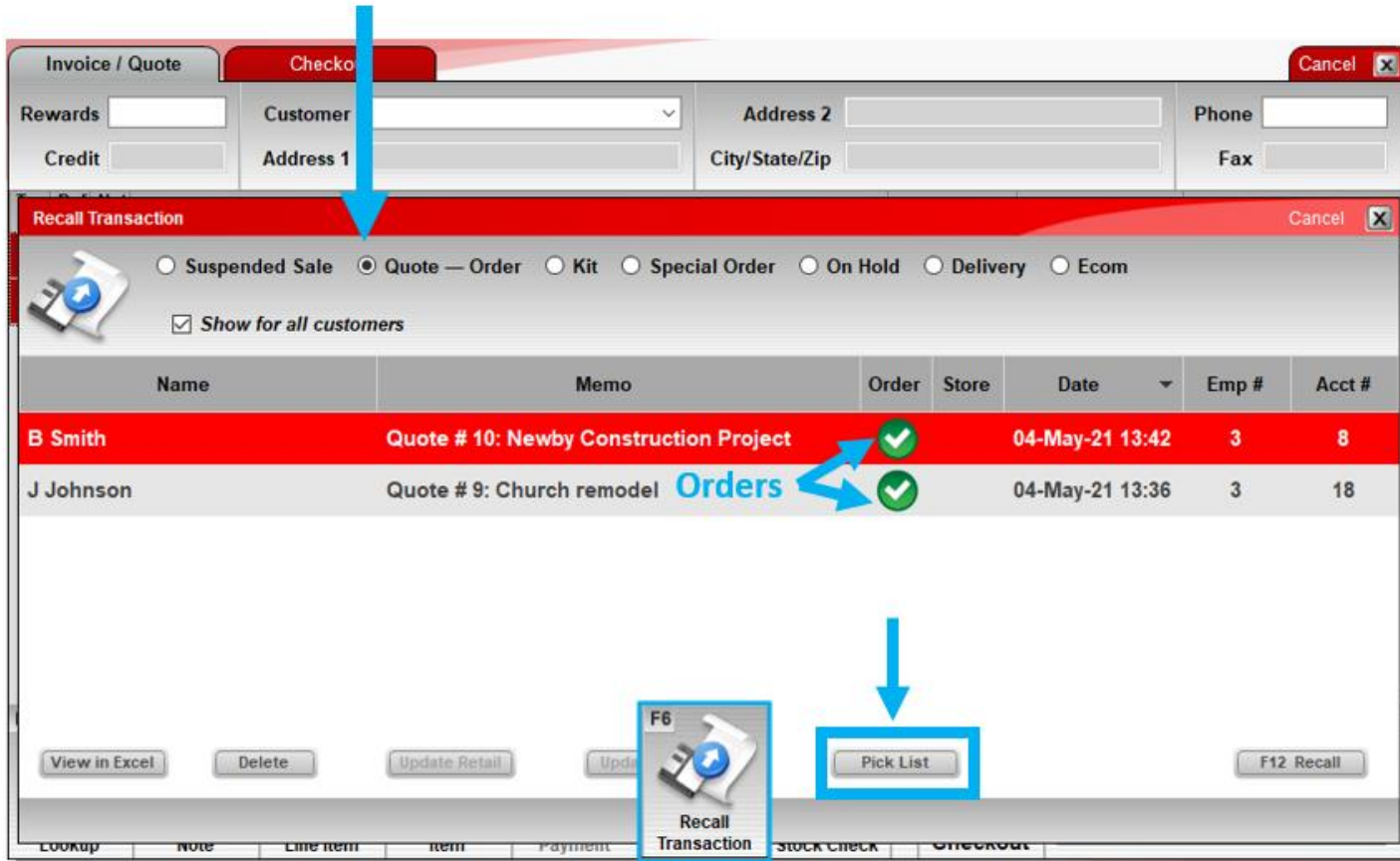
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Chief Experience Officer
May 11, 2021

WHAT YOU'LL LEARN

- 2021-A new features
 - Pick List
 - Auto-delete quotes
 - Skip signatures in Mobile2Checkout
 - Transaction Report adds Rewards IDs
 - Charge Customer Utility
 - Warehouse availability for Orgill and Do It Best
 - True Value RSC quantities update nightly
 - Ace Rewards: Terms and Conditions at sign up
 - Acehardware.com protection plan support
- Features coming soon

2021-A new features

Pick List Report



Invoice / Quote **Check** Cancel

Rewards Customer Address 2 Phone

Credit Address 1 City/State/Zip Fax

Recall Transaction Cancel

☐ Suspended Sale ☒ Quote — Order ☐ Kit ☐ Special Order ☐ On Hold ☐ Delivery ☐ Ecom

☒ Show for all customers

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

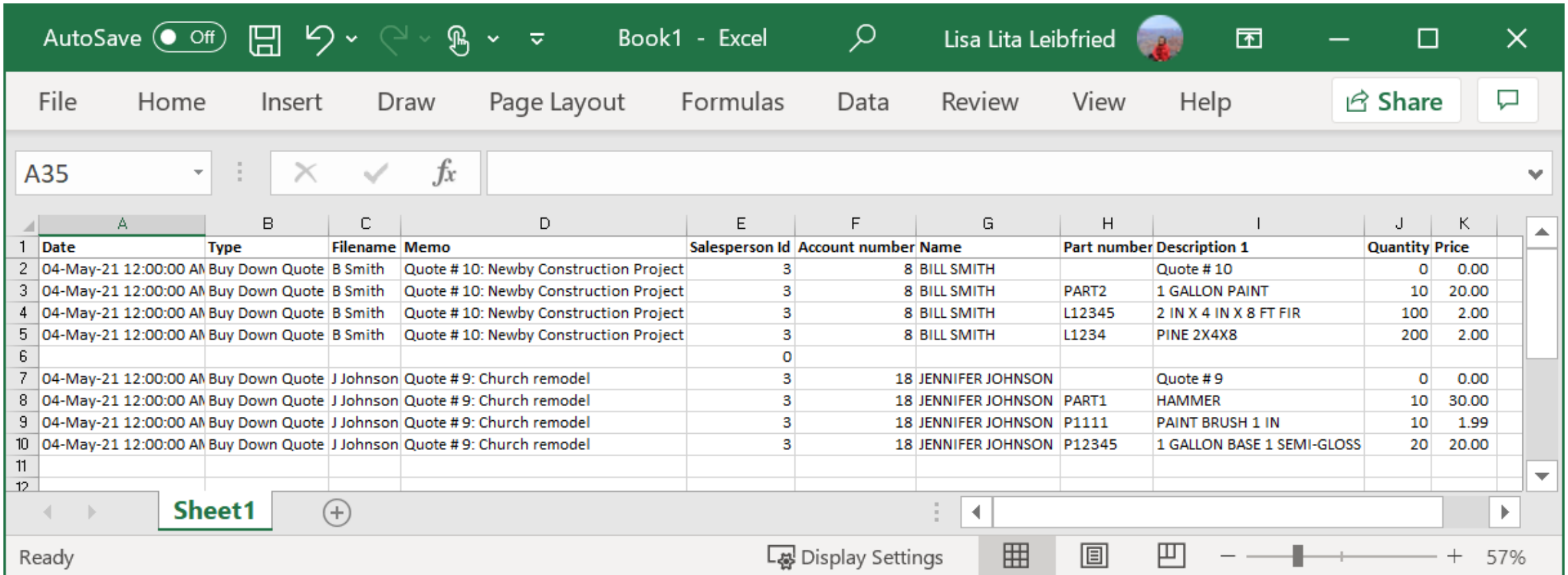
View in Excel Delete Update Retail **Pick List** F12 Recall











Lookup Note Line Item Item Payment Stock Check Checkbook



- Provides a list of outstanding order items in Excel.
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  

A35   

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

Sheet1 

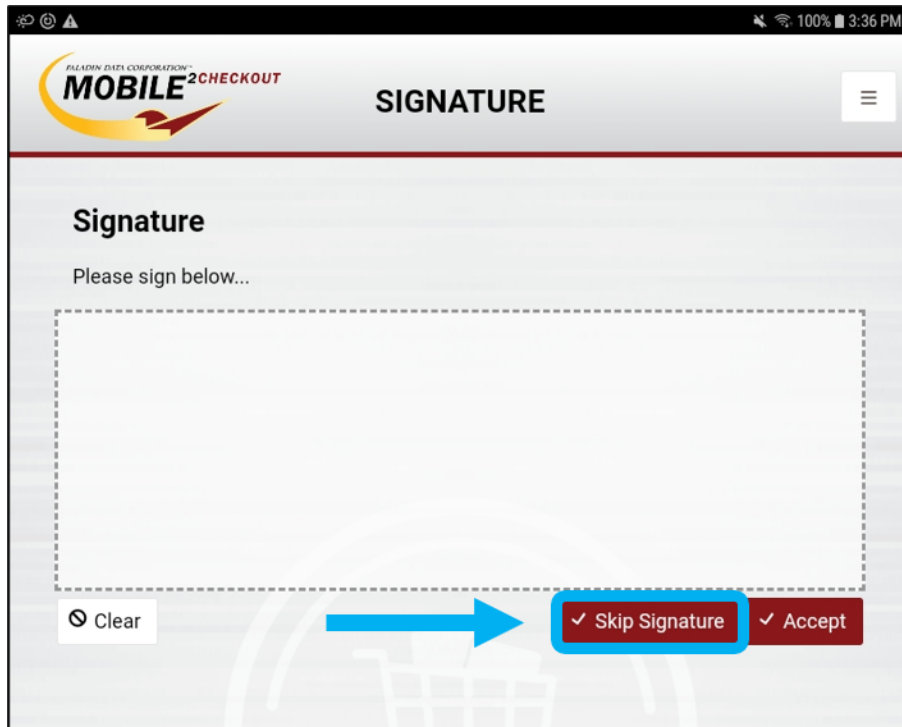
Ready  Display Settings     57%

Declutter your quotes by removing older ones



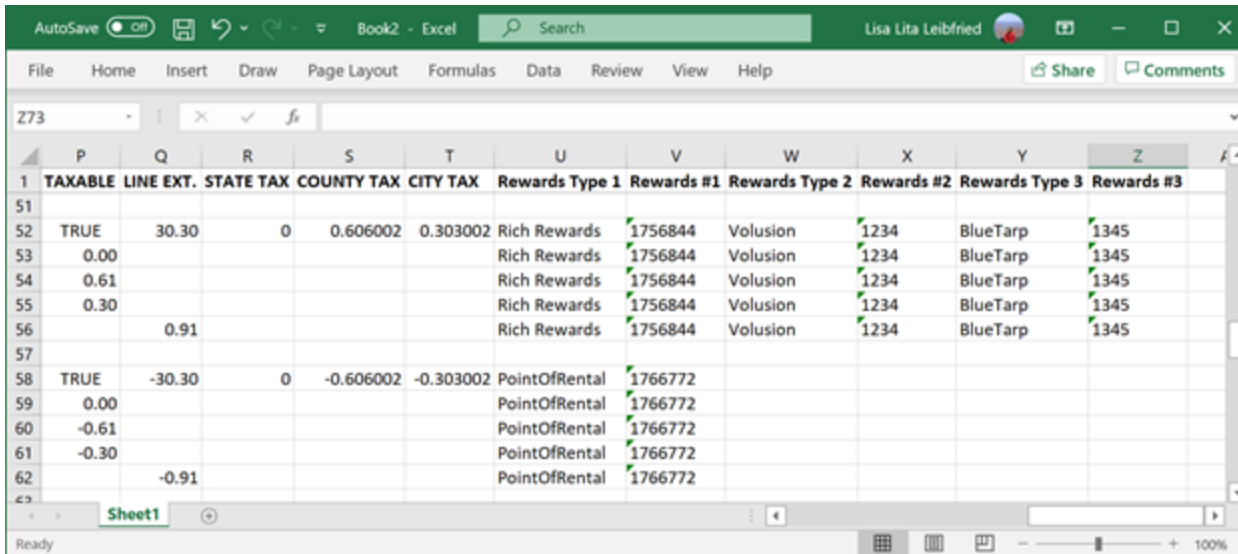
- Remove quotes automatically after a time period (days) that you specify.
 - By default, quotes are never deleted.
 - **Important:** Deleted quotes cannot be restored.
- In Paladin, go to **File > Setup > Invoice (Store) tab** and look for this setting:
 - **Delete stored quotes after**
<select a number> days
 - If set to zero (0), quotes are never deleted.

Skip signature on Mobile2Checkout app



- Process a transaction with 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.

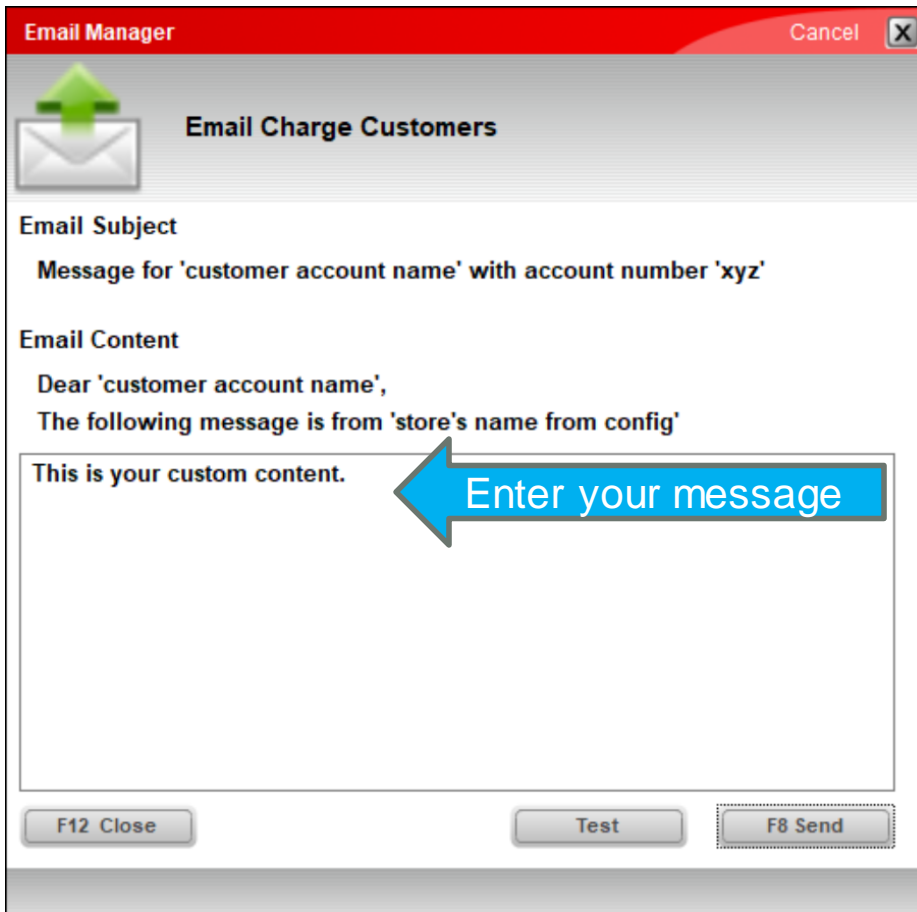
Transaction Report includes Rewards IDs



	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 sub-header "Email Charge Customers" with a green envelope icon and a green arrow pointing up. The main area is divided into sections: "Email Subject" with the text "Message for 'customer account name' with account number 'xyz'", and "Email Content" with the text "Dear 'customer account name', The following message is from 'store's name from config'". Below the content text is a large text area containing "This is your custom content." and a blue arrow pointing to it with the text "Enter your message". At the bottom 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'

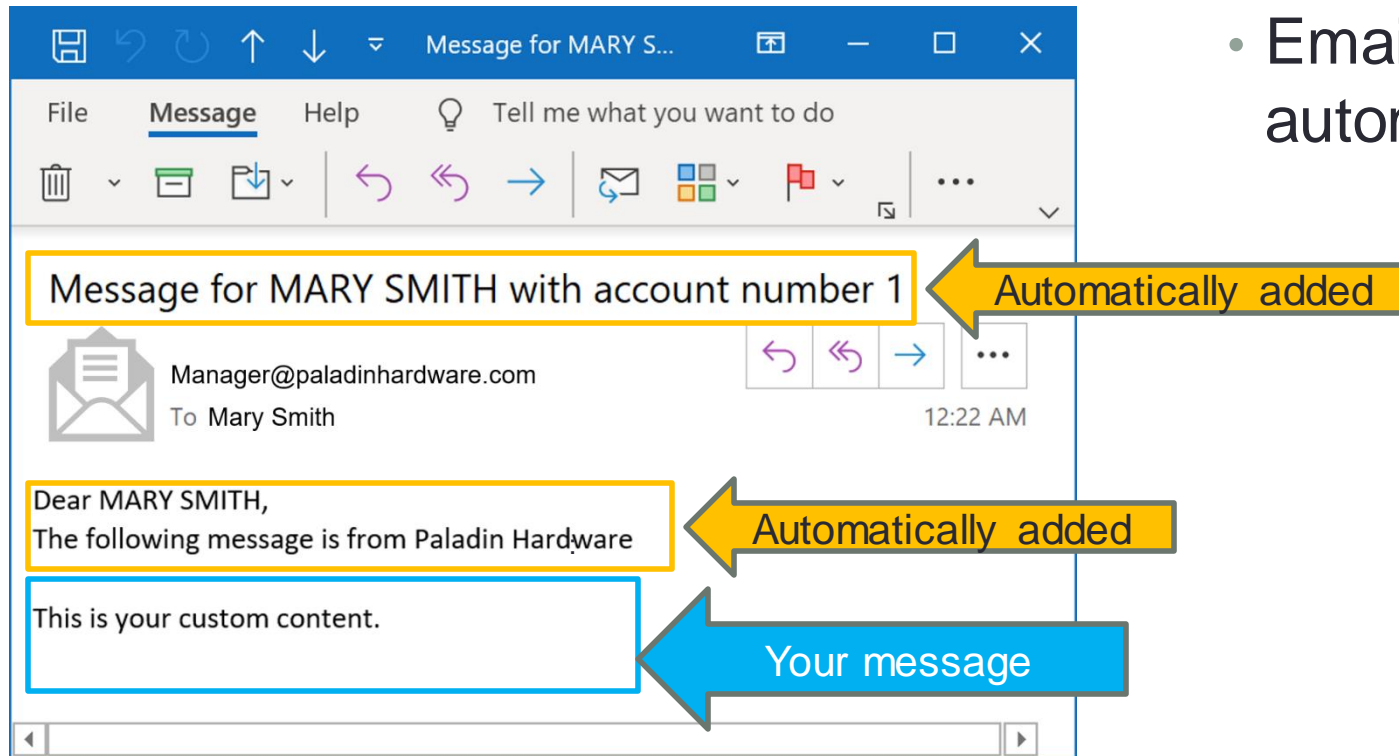
This is your custom content. Enter your message

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**

Charge Customer Email Utility

- Email subject and salutation are automatically added.



Returns – Charge Only

Paladin Configuration

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

Store Access

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

Access Levels

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Inventory <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Configuration <input type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>
Returns - Charge Only <input type="checkbox"/>	Daily Balance Reports Only <input type="checkbox"/>
Inventory <input checked="" type="checkbox"/>	Maintain Customers <input checked="" type="checkbox"/>
Read-only <input type="checkbox"/>	Customer Accounting Access <input type="checkbox"/>
PaladinNsght <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.

Warehouse stock on hand updates

Supplier	Refresh rate	Data provided
Ace	Real-time	SOH
True Value	Updated nightly	SOH, On order quantity
Do It Best Added	Updated hourly Note: Only changes in warehouse SOH are reported. Therefore, SOH for a new inventory item in Paladin will not appear until the SOH changes at the warehouse..	SOH
Orgill Added	Updated hourly	SOH

- Warehouse SOH access has been added for Orgill and Do It Best suppliers.
 - Already available for Ace and True Value.
- True Value SOH is now updated nightly (previously was updated during EDI processing).
- Warehouse SOH is available in the **PO, Inventory** and **Invoice/Quote** modules.

Warehouse SOH set up: Orgill



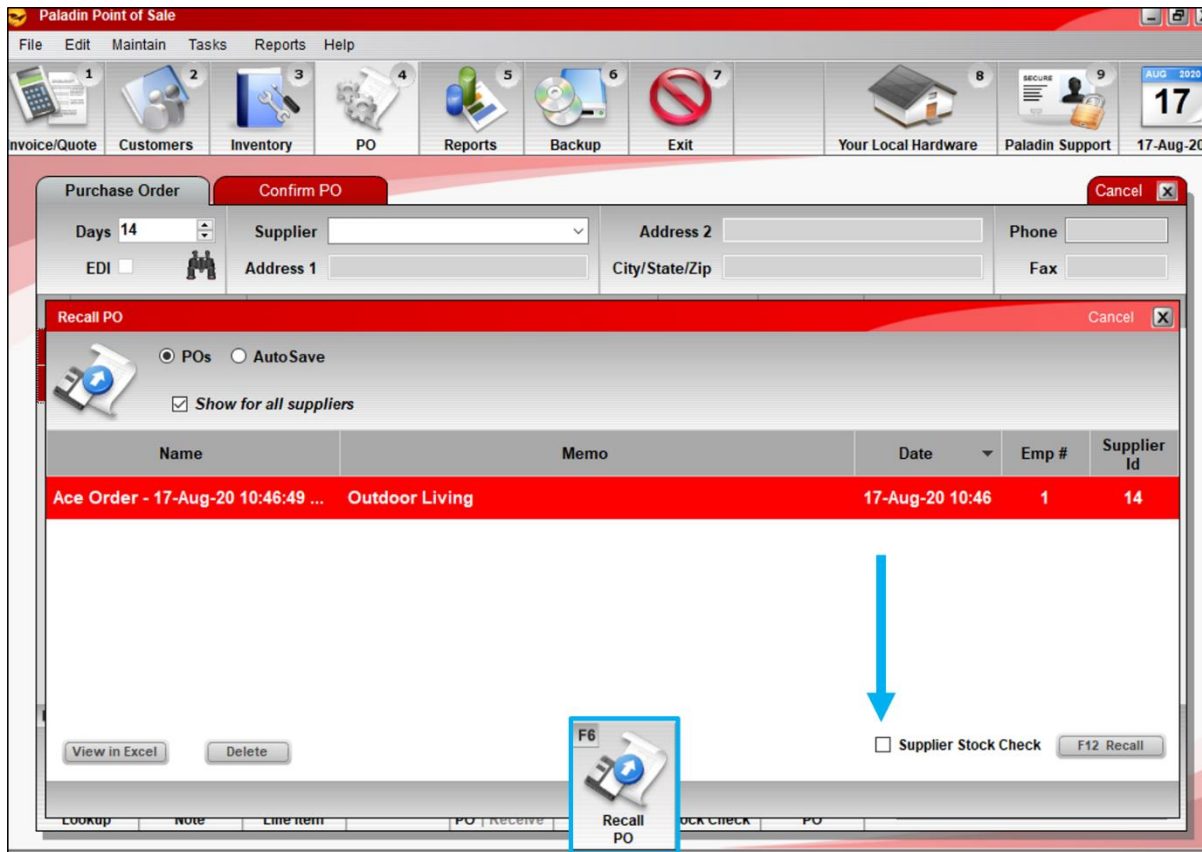
- After the feature is installed and you recall a PO, a notification automatically appears.
- Select a warehouse location (not optional) and click **Enable** (not optional).

Warehouse SOH set up: Do It Best

- When you recall a PO, a notification automatically appears.
 - Click **Learn More** for feature details (optional).
 - Click **Enable** to turn it on (not optional).

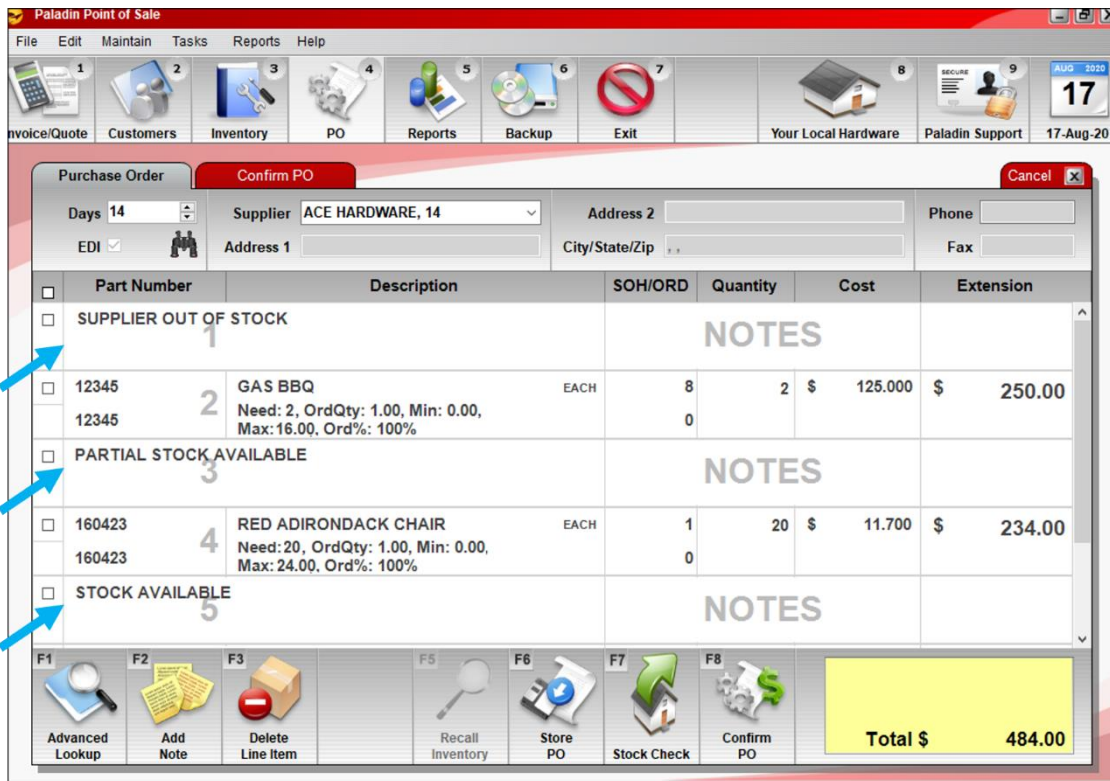


Warehouse availability in PO module



- Sort your purchase order by warehouse availability before you buy.
- Before you recall a PO for a supported supplier, select **Supplier Stock Check**.

Warehouse availability in PO module

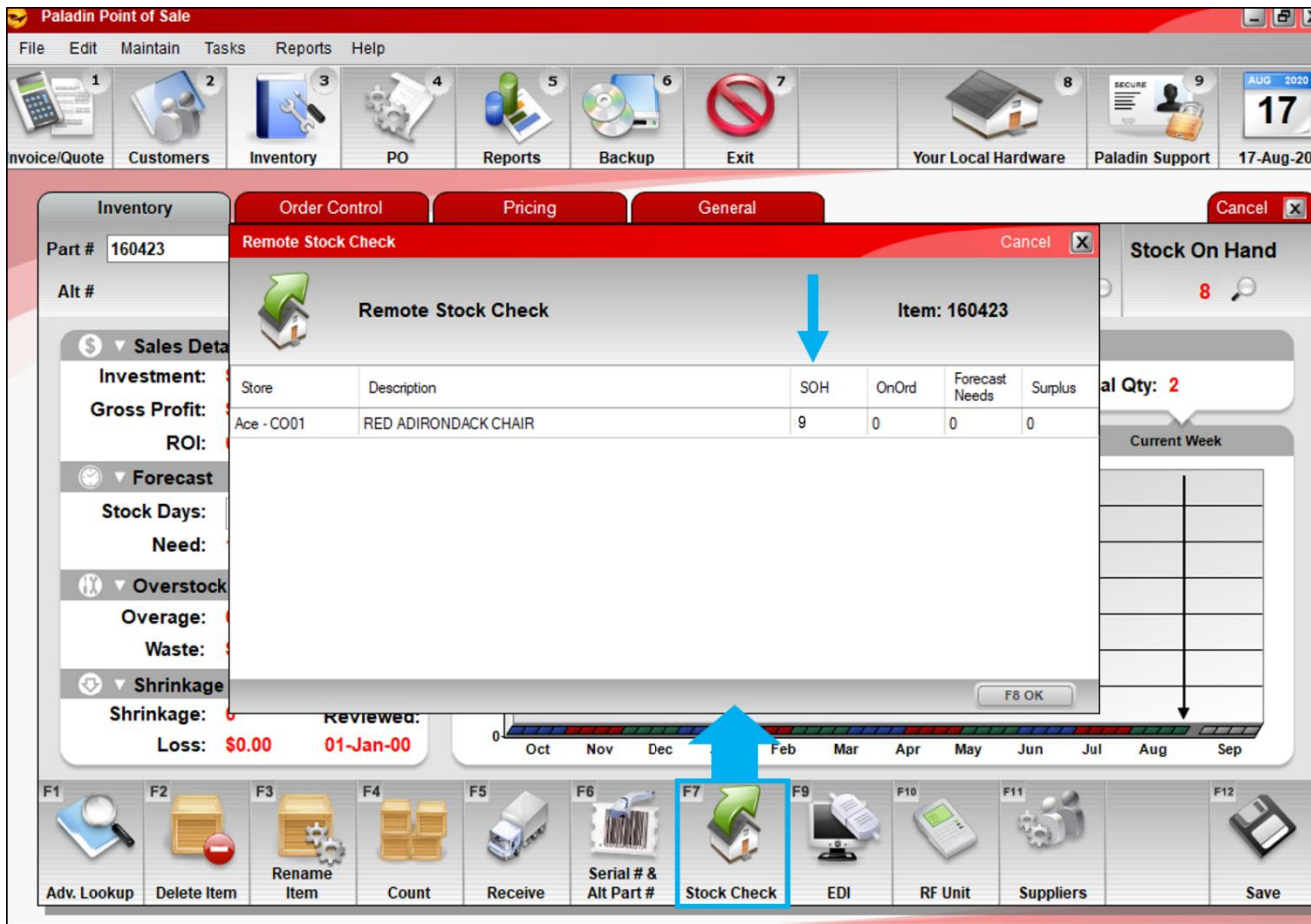


Part Number	Description	SOH/ORD	Quantity	Cost	Extension
SUPPLIER OUT OF STOCK					
12345	GAS BBQ	EACH	8	\$ 125.00	\$ 250.00
12345	Need: 2, OrdQty: 1.00, Min: 0.00, Max: 16.00, Ord%: 100%	0			
PARTIAL STOCK AVAILABLE					
160423	RED ADIRONDACK CHAIR	EACH	1	\$ 11.700	\$ 234.00
160423	Need: 20, OrdQty: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

Total \$ 484.00

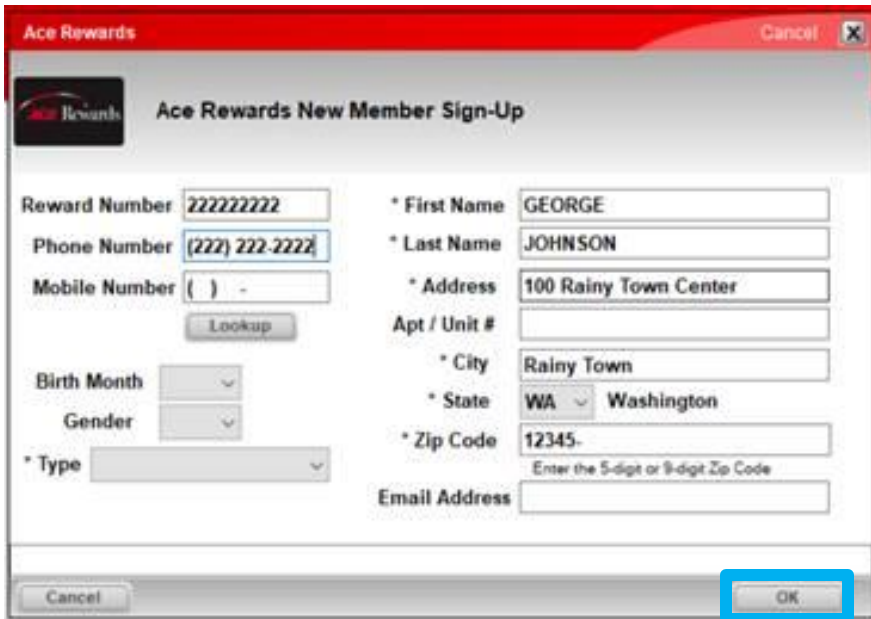
- When the purchase order opens, it is sorted by:
 - **SUPPLIER OUT OF STOCK:** Shows PO items that are not in stock at the warehouse.
 - **PARTIAL STOCK AVAILABLE:** Shows PO items that are in stock at the warehouse, but not enough to cover your current order quantity.
 - **STOCK AVAILABLE:** Shows PO items that are in stock at the warehouse for your order quantity.
- Remove out of stock items and adjust quantities as needed.

Warehouse SOH for an inventory item



- View the latest warehouse SOH for any item by clicking **Stock Check** or **Transfer** (multi-store).
- Available in the **PO**, **Inventory** and **Invoice/Quote** modules.

Ace Rewards Sign up: Terms and Conditions must be accepted



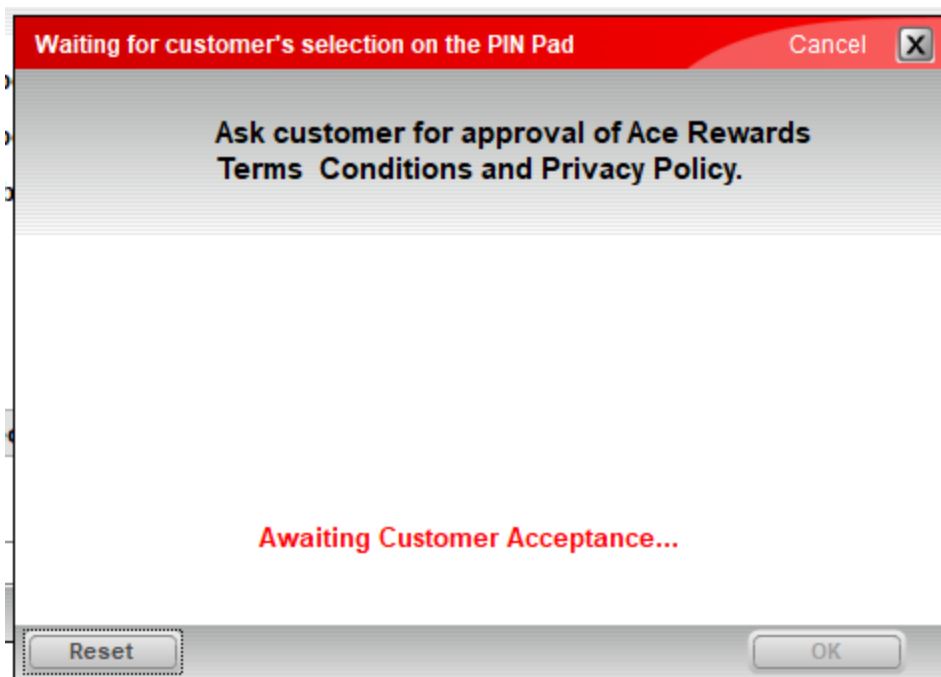
Must accept Ace Rewards Terms and Conditions to complete sign up

- Ace now requires that new Ace Rewards members agree to the Ace Rewards Terms and Conditions at sign up.
- In the **Ace Rewards New Member Sign Up** window, when the cashier clicks **OK**, the customer is prompted to accept Terms and Conditions and sign on the payment terminal.
- If the customer declines, they cannot sign up for Ace Rewards.
- A signature capture device is required. If one does not exist, this step is skipped.
- Ace Rewards Terms and Conditions are not displayed/accessible on the signature device.

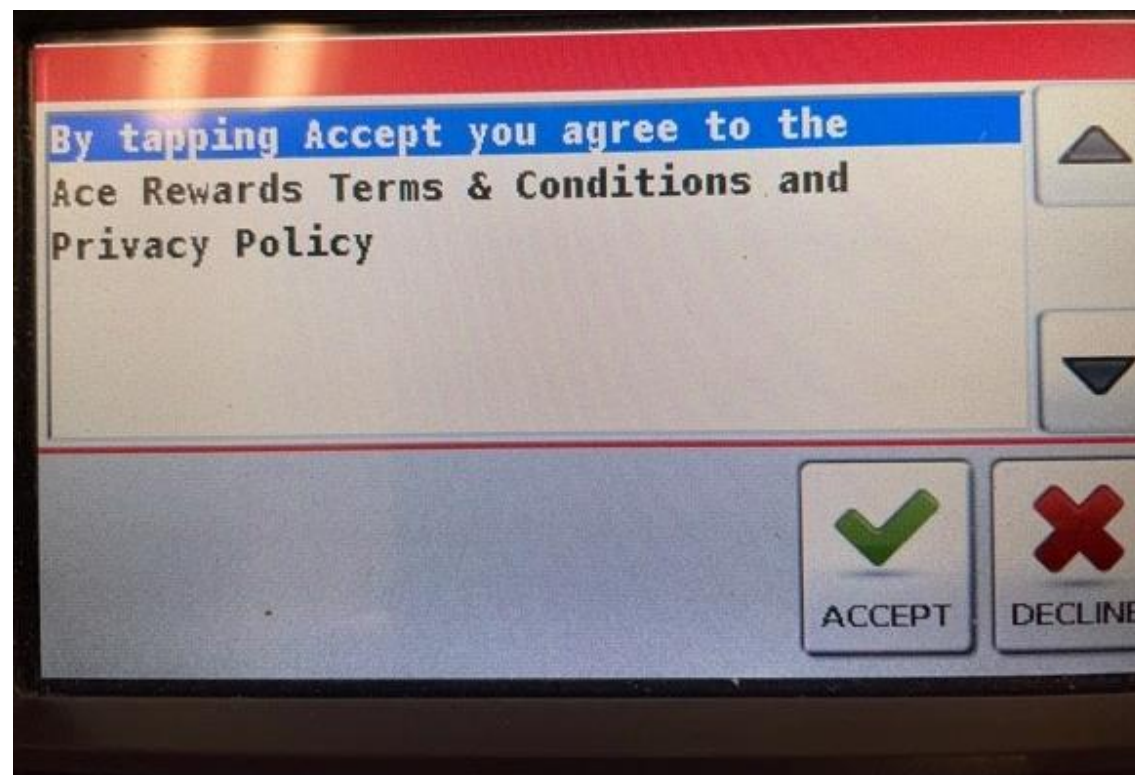
Ace Rewards Sign up: Terms and Conditions must be accepted

After cashier clicks **OK** in the **Ace Rewards New Member Sign Up** window

Cashier sees



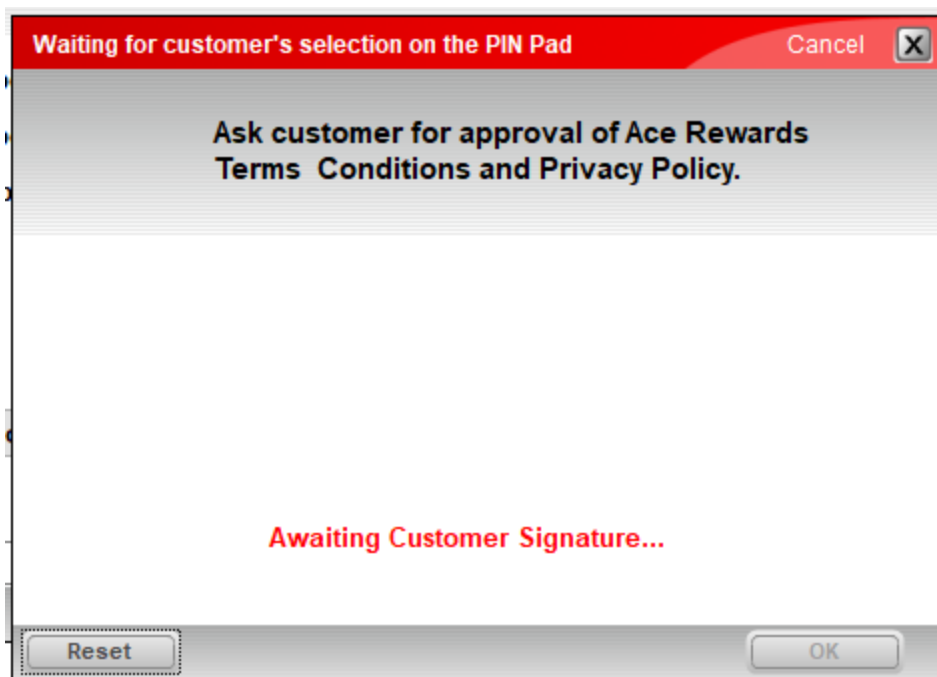
Customer sees



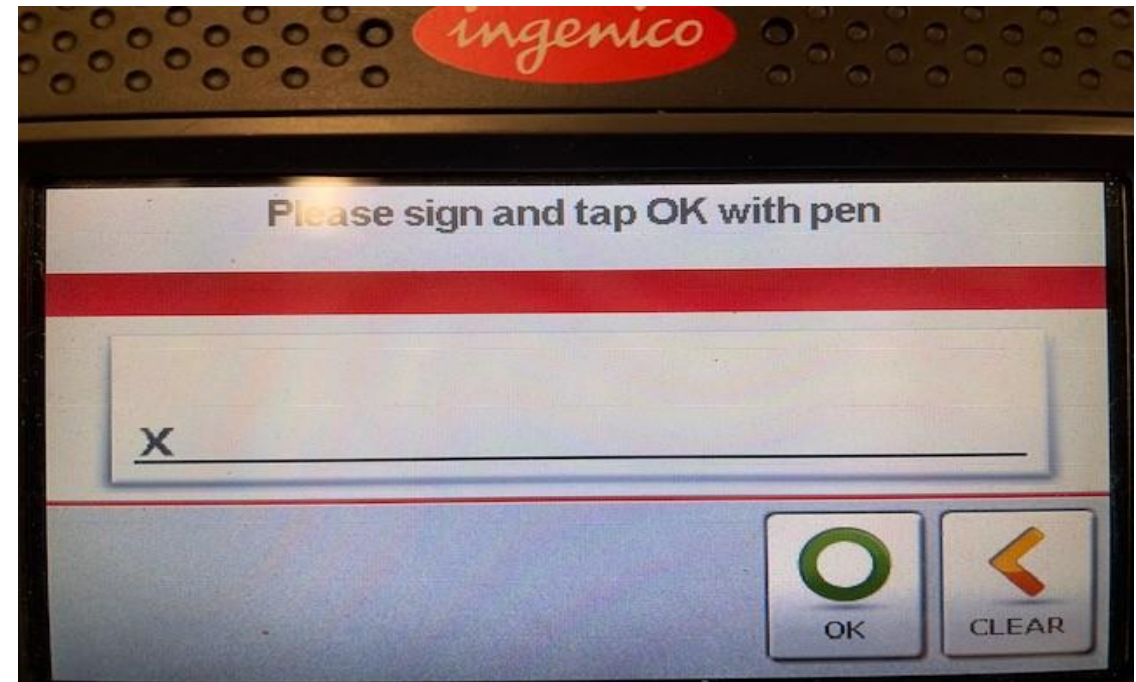
Ace Rewards Sign up: Terms and Conditions must be accepted

After the customer taps **ACCEPT**

Cashier sees



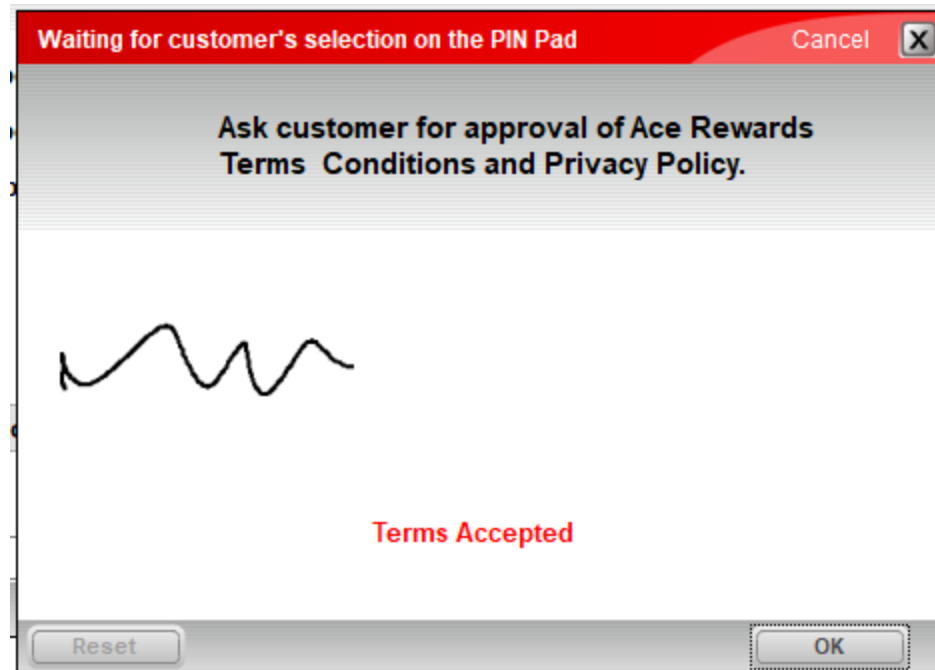
Customer sees



Ace Rewards Sign up: Terms and Conditions must be accepted

After the customer signs and taps **OK**

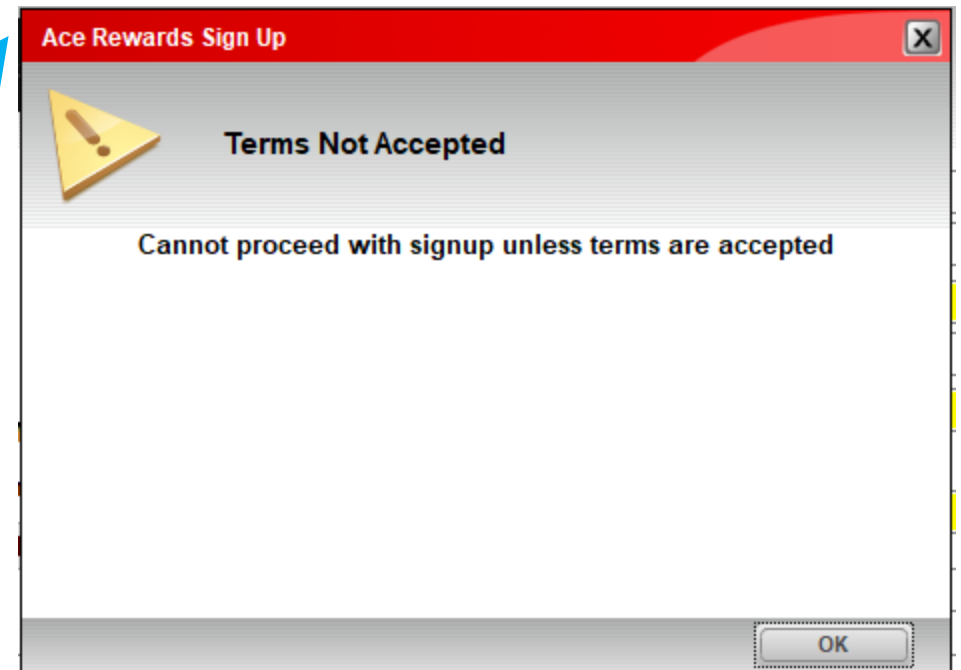
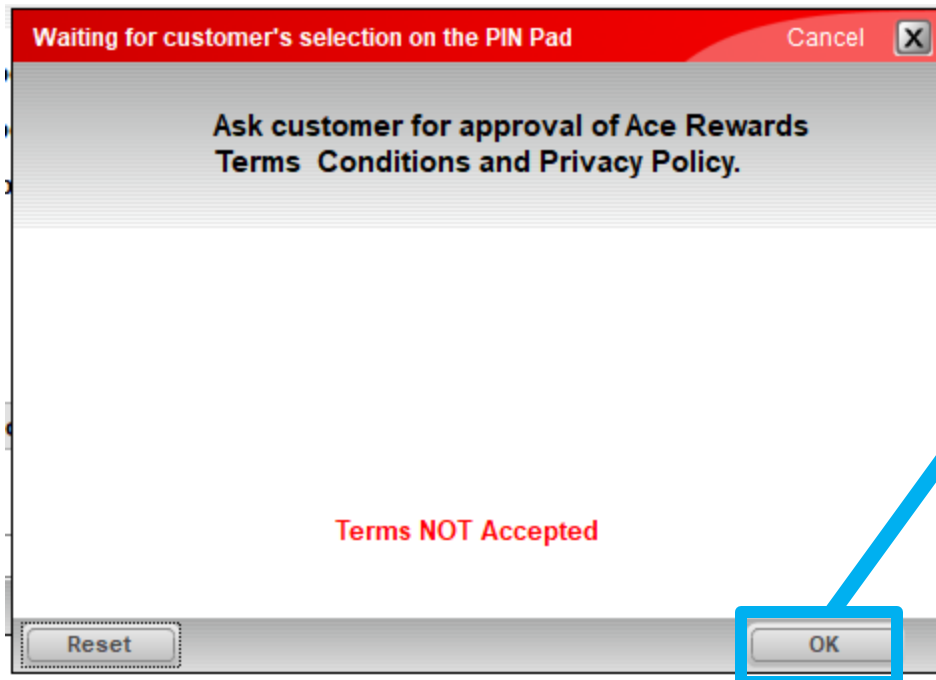
Cashier sees



Ace Rewards Sign up: Terms and Conditions must be accepted

After the customer taps **DECLINE**

Cashier sees



Acehardware.com protection plan support

Ace #	Short Desc	Long Desc	Price Band	Retail	Cost	Retailer Profit
9020434	2yr PP \$0-\$24.99	2-Year Product Protection Plan \$0-\$24.99	\$0 - \$24.99	\$2.99	\$1.81	\$1.18
9020435	2yr PP \$25-\$49.99	2-Year Product Protection Plan \$25-\$49.99	\$25 - \$49.99	\$6.99	\$3.65	\$3.34
9020437	2yr PP \$50-\$99.99	2-Year Product Protection Plan \$50-\$99.99	\$50 - \$99.99	\$11.99	\$6.89	\$5.10
9020440	2yr PP \$100-\$149.99	2-Year Product Protection Plan \$100-\$149.99	\$100 - \$149.99	\$17.99	\$10.75	\$7.24
9020441	2yr PP \$150-\$199.99	2-Year Product Protection Plan \$150-\$199.99	\$150 - \$199.99	\$24.99	\$13.50	\$11.49
9020442	2yr PP \$200-\$299.99	2-Year Product Protection Plan \$200-\$299.99	\$200 - \$299.99	\$44.99	\$24.10	\$20.89
9020443	3yr PP \$300-\$499.99	3-Year Product Protection Plan \$300-\$499.99	\$300 - \$499.99	\$69.99	\$36.39	\$33.60
9020446	3yr PP \$500-\$999.99	3-Year Product Protection Plan \$500-\$999.99	\$500 - \$999.99	\$129.99	\$63.11	\$66.88
9020448	3yr PP \$1000-\$2999.99	3-Year Product Protection Plan \$1000-\$2999.99	\$1000 - \$2999.99	\$189.99	\$101.10	\$88.89
9020449	5yr PP Water Heater	5-Year Product Protection Plan water heater	Water Heaters	\$79.99	\$38.72	\$41.27

- Ace is developing a new warranty program that allows customers to purchase a protection plan for some items when they buy the item on acehardware.com
- To support “buy online/pick up in store” purchases, you may notice new Ace part #'s in your inventory.
- For more information, contact Ace Hardware.

Features coming soon


Collect on Delivery



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

COD: When a customer has no store credit

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



Customers

Status: Active

Rewards: 1553073

Customer: 8 - BILL SMITH


Address 1: 123 Green St.

Credit

☐ Balance Forward ☒ Open Item

Credit Limit: 0

Default PO # to use:



Invoice / Quote

Rewards: 1553073

Credit: 0.00

Customer: 8 - BILL SMITH

Address 1: 123 Green St.

Address 2:

City/State/Zip: Bend, OR, 97701

Phone: 1234567890

Fax:

Payment Type	Amount
AMOUNT DUE	\$ 566.50
Select Payment	

Delivery details will be collected during checkout

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

F1 Cash F2 Charge F3 Credit Card F4 Check F5 Coupon F6 Store Transaction F7 Print Quote F8 Tax F9 Schedule Delivery

Subtotal \$ 550.00

Tax \$ 16.50

Total \$ 566.50

COD: When a customer has no store credit

Thanks for shopping
our friendly store.

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

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

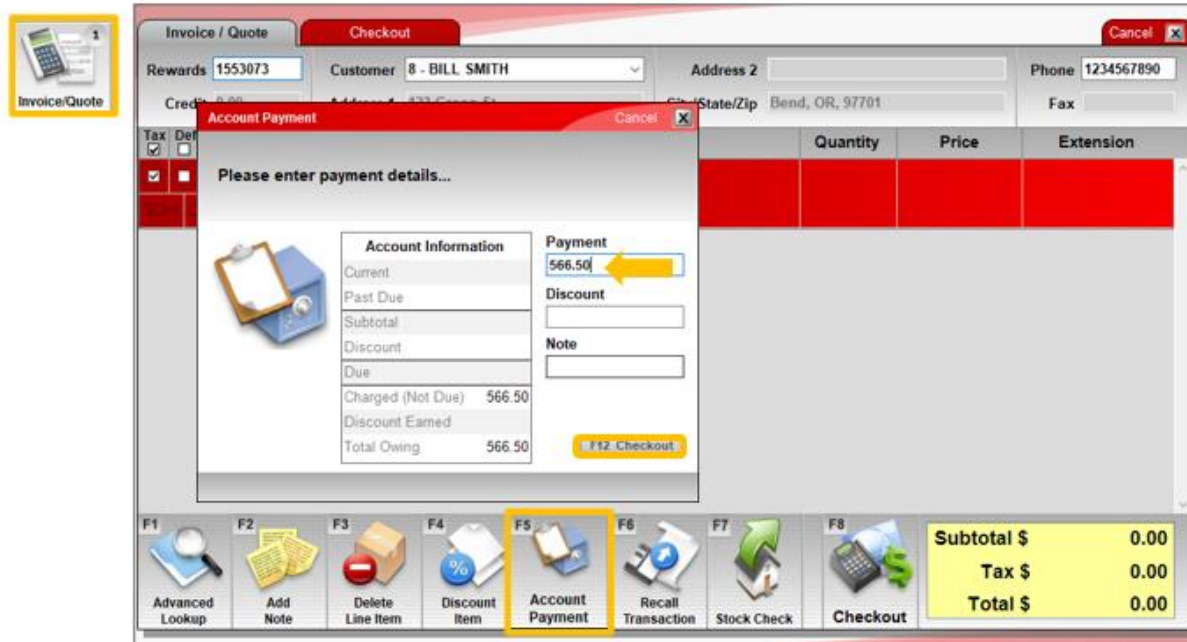
SUBTOTAL \$	550.00
TAX \$	16.50
TOTAL \$	566.50

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

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

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

COD: When a customer has no store credit



The screenshot displays the University POS system interface. A red 'Account Payment' dialog box is open, prompting the user to 'Please enter payment details...'. The dialog box contains the following fields:

Account Information	
Current	
Past Due	
Subtotal	
Discount	
Due	
Charged (Not Due)	566.50
Discount Earned	
Total Owning	566.50

On the right side of the dialog box, there are input fields for 'Payment' (containing 566.50), 'Discount', and 'Note'. A yellow arrow points to the 'Payment' field. Below these fields is a 'F12 Checkout' button.

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

- Rewards: 1553073
- Customer: 8 - BILL SMITH
- Address 2: Bend, OR, 97701
- Phone: 1234567890
- Fax:

The bottom of the screen features a toolbar with icons for various functions: F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Discount Item, F5 Account Payment (highlighted with a yellow box), F6 Recall Transaction, F7 Stock Check, and F8 Checkout. To the right of the toolbar is a summary table:

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

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

COD: When a customer exceeds their store credit

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



Customers **Credit** **Balance**

Status: Active Customer: 1 - MARY SMITH

Rewards: 1234 Address 1: 100 MAIN STREET

Credit

☒ Balance Forward ☐ Open Item

Credit Limit: 1000

Default PO # to use:




Invoice / Quote **Checkout** **Cancel**

Rewards: 1234 Customer: 1 - MARY SMITH Address 2: Phone: 5858585858

Credit: 1,000.00 Address 1: 100 MAIN STREET City/State/Zip: BEAUTIFUL CITY, KS, 00000 Fax:

Account Warnings **Cancel**


Manager approval needed...

 - Invoice charge amount: \$ 2,060.00

- Credit limit will be exceeded by: \$ 1,055.00

☐ Collect this amount on delivery: COD (Manager password not required)

Payment Type **Amount**

AMOUNT DUE	\$ 0.00
 Charge	\$ 2,060.00
CHANGE DUE	\$ 0.00

Subtotal \$ 2,000.00

Tax \$ 60.00

Total \$ 2,060.00

STEP 1 **DELETE** **Print Quote** **Tax** **Schedule Delivery**

Cash Charge Credit Card Check Coupon Store Transaction

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

COD: When a customer exceeds their store credit

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

Thanks for shopping
our friendly store.

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

ITEM	QTY	SALE/REG	EXT
***** COLLECT \$2060.00 ON DELIVERY *****			
PART1	100.00	20.00	2000.00
EACH			
HAMMER			

*** DELIVERY * DELIVERY * DELIVERY ***
Scheduled: 26-Apr-21, 03:00 PM - 03:30 PM
Email: lisal@paladinpos.com
Delivery Phone #: (123) 321-1234

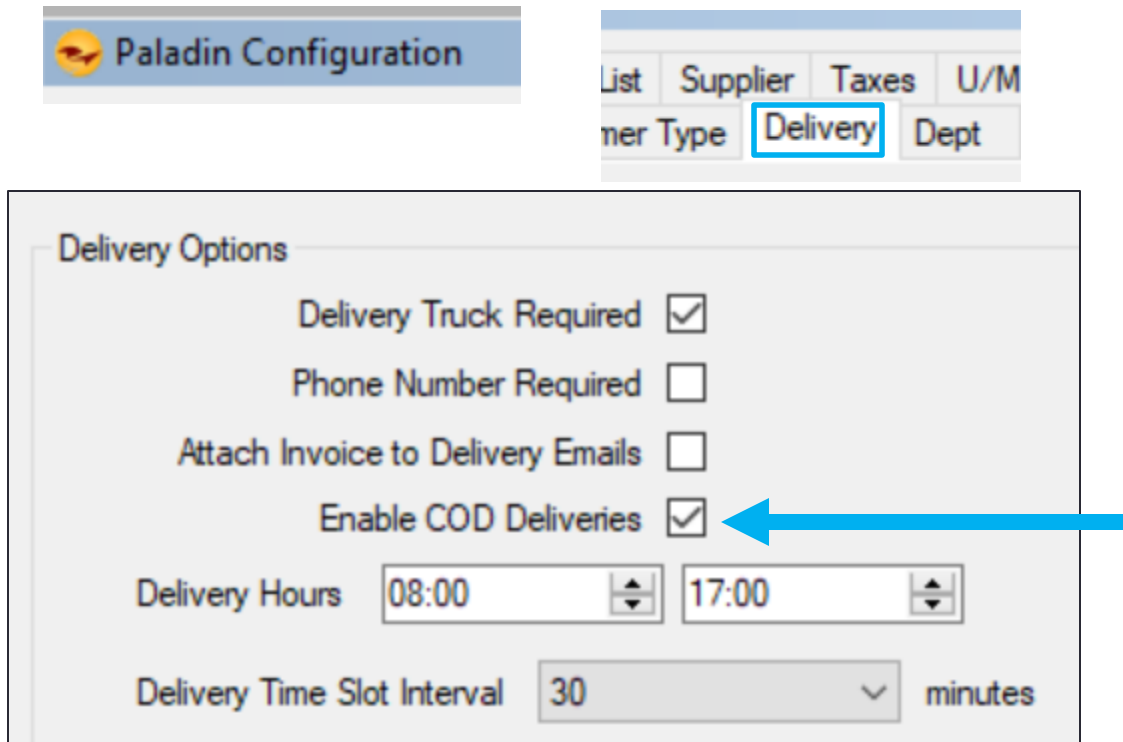
Address:
100 MAIN STREET
BEAUTIFUL CITY, KS 00000
*** DELIVERY * DELIVERY * DELIVERY ***
***** COLLECT \$2060.00 ON DELIVERY *****

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

CHARGE 2,060.00

Full invoice amount will be
collected on delivery (COD)

Turn on Collect on Delivery (COD) feature



Paladin Configuration

List Supplier Taxes U/M
mer Type **Delivery** Dept

Delivery Options

Delivery Truck Required ☒

Phone Number Required ☐

Attach Invoice to Delivery Emails ☐

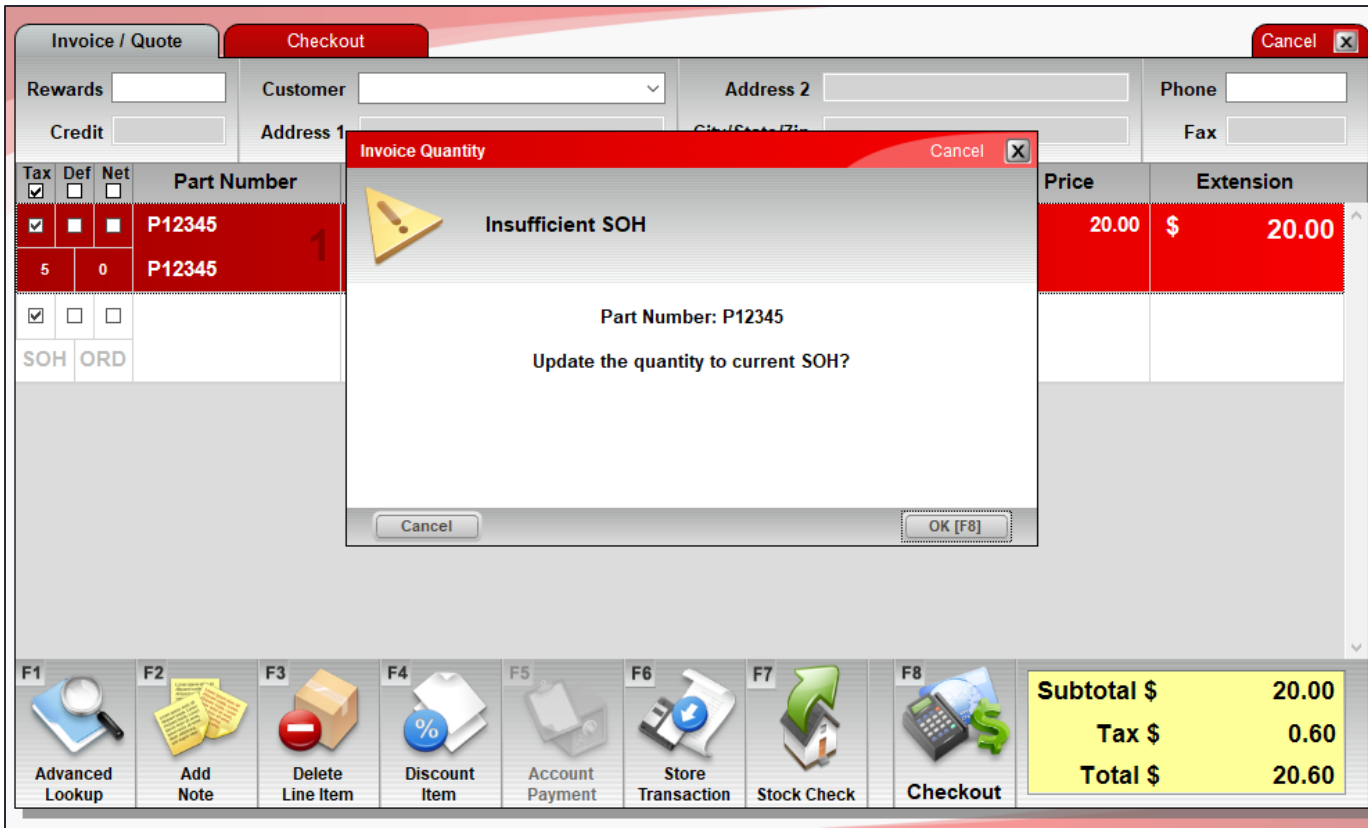
Enable COD Deliveries ☒

Delivery Hours 08:00 17:00

Delivery Time Slot Interval 30 minutes

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

Insufficient SOH (oversold) warning



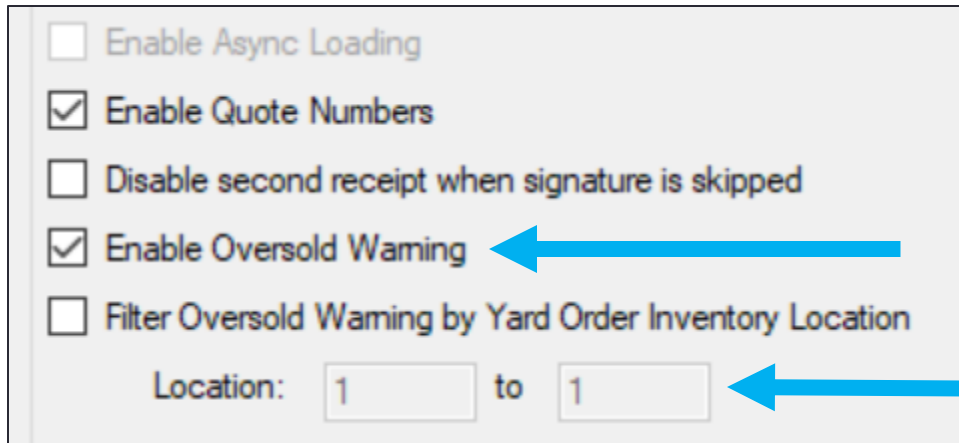
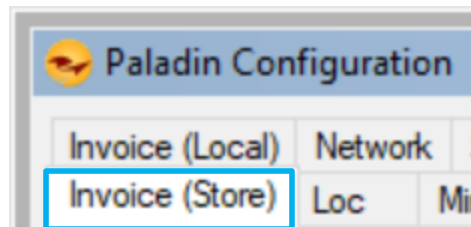
The screenshot shows the 'Invoice / Quote' module with the 'Checkout' tab selected. A red dialog box titled 'Invoice Quantity' is displayed, warning of 'Insufficient SOH' for Part Number P12345. The dialog asks 'Update the quantity to current SOH?' and provides 'Cancel' and 'OK [F8]' buttons. The background shows a table with columns for Tax, Def, Net, Part Number, Price, and Extension. The table contains one row for Part Number P12345 with a Price of 20.00 and an Extension of 20.00. The bottom of the screen features a toolbar with icons for various functions: Advanced Lookup (F1), Add Note (F2), Delete Line Item (F3), Discount Item (F4), Account Payment (F5), Store Transaction (F6), Stock Check (F7), and Checkout (F8). A summary box on the right shows Subtotal \$ 20.00, Tax \$ 0.60, and Total \$ 20.60.

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		

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

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

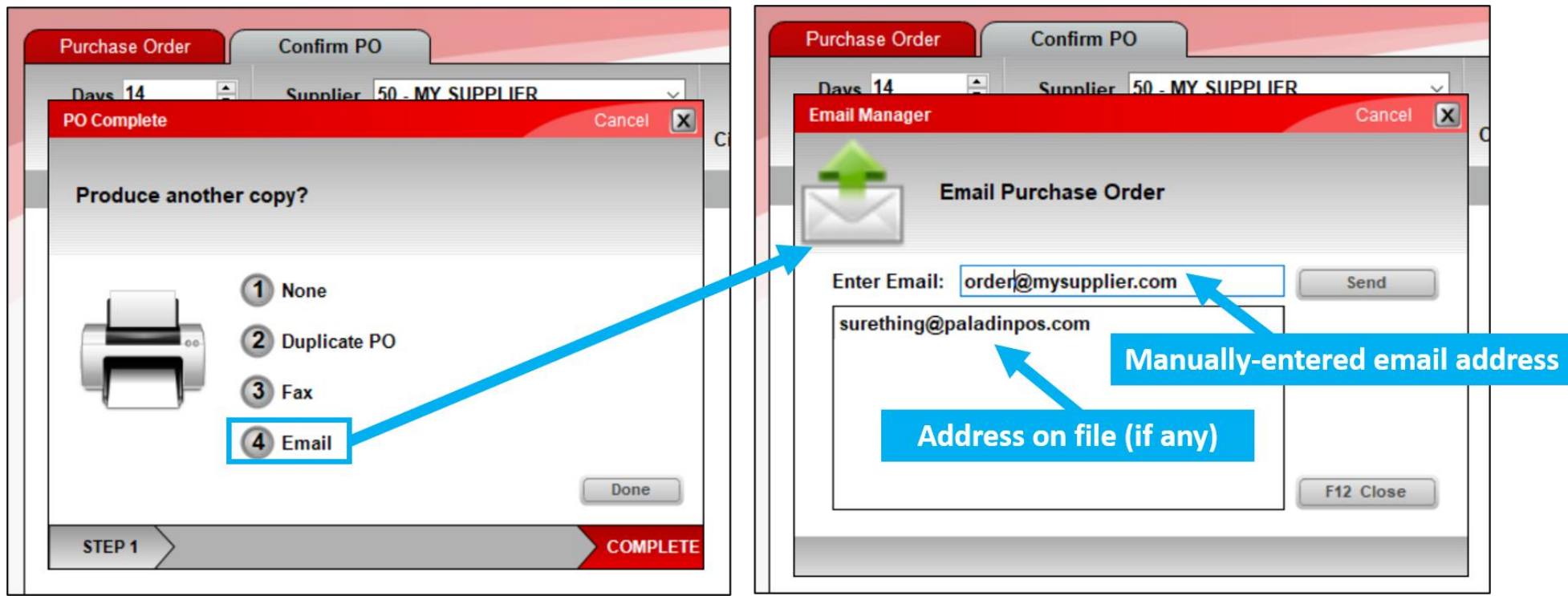
Turn on Insufficient SOH (oversold) message




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

Email purchase order to any address

- You can email a purchase order to the supplier address on file (if any) and/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.



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!! → Advance By-Line 1
Come see us again soon! → Advance By-Line 2
Hardware Store
188 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.

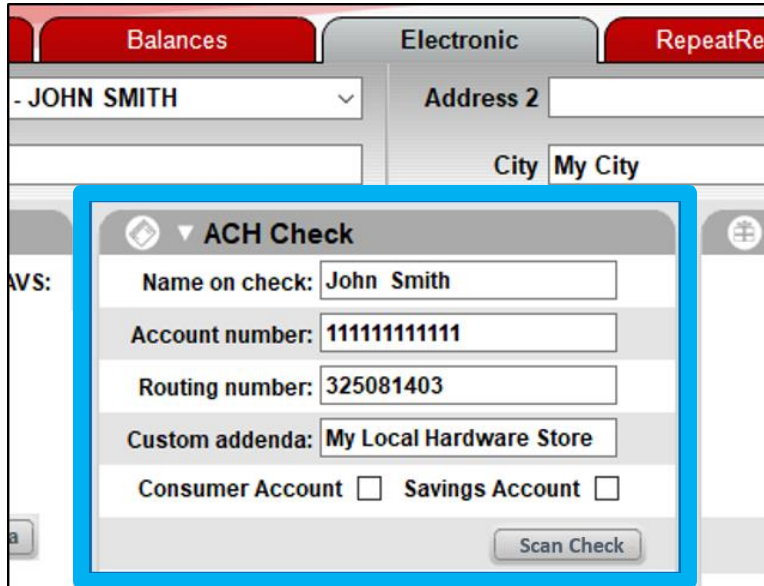
WE KNOW YOU HAVE CHOICES → Footer Line 1
THANK-YOU → Footer Line 2
FOR MAKING US ONE OF THEM → Footer Line 3
HAVE A GREAT DAY! → Footer Line 4

Invoice/Receipt Description → **INVOICE**


Our spring sale is coming! → QR Message 1
March 28 - 27 → QR Message 2

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

ACH Check

Name on check: John Smith

Account number: 11111111111

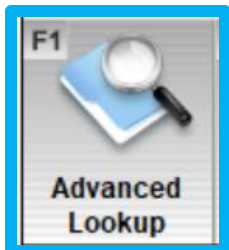
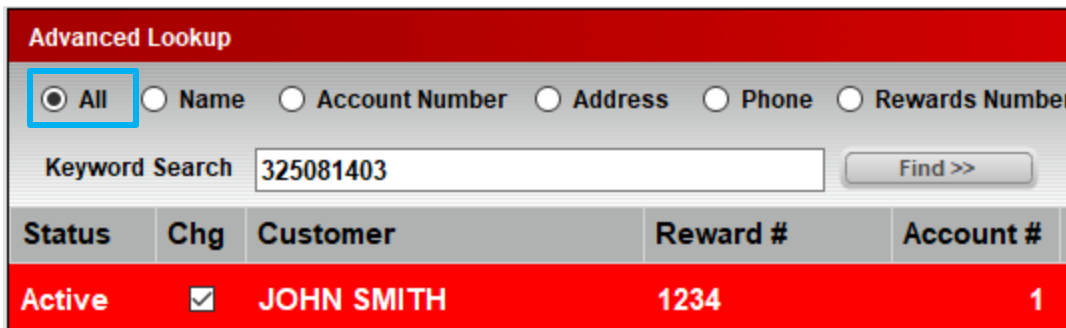
Routing number: 325081403

Custom addenda: My Local Hardware Store

Consumer Account ☐ Savings Account ☐

Scan Check

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

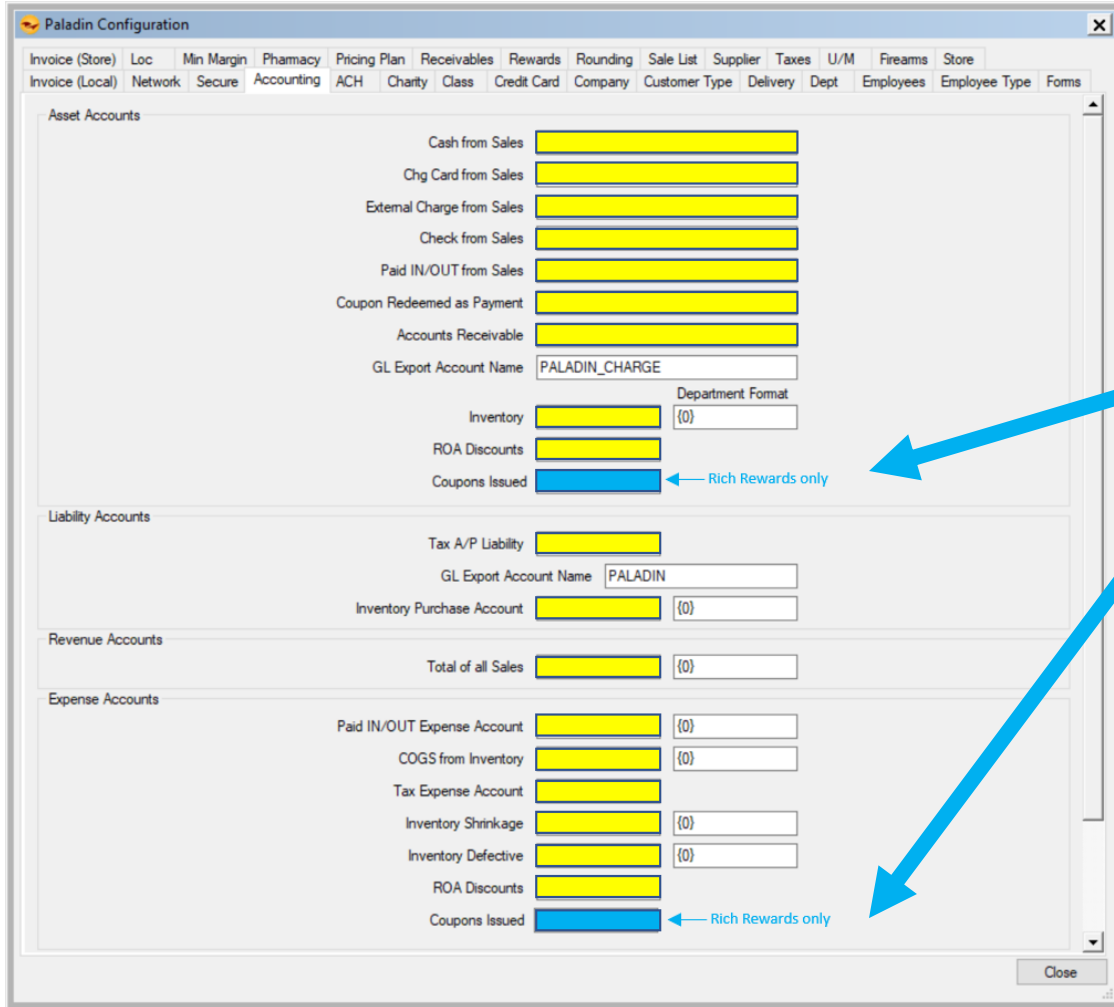
Advanced Lookup

☒ All ☐ Name ☐ Account Number ☐ Address ☐ Phone ☐ Rewards Number

Keyword Search 325081403 Find >>

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

GL Summary: New categories for Rich Rewards



Paladin Configuration

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

Asset Accounts

Cash from Sales

Chg Card from Sales

External Charge from Sales

Check from Sales

Paid IN/OUT from Sales

Coupon Redeemed as Payment

Accounts Receivable

GL Export Account Name PALADIN_CHARGE

Inventory Department Format {0}

ROA Discounts

Coupons Issued ← Rich Rewards only

Liability Accounts

Tax A/P Liability

GL Export Account Name PALADIN

Inventory Purchase Account {0}

Revenue Accounts

Total of all Sales {0}

Expense Accounts

Paid IN/OUT Expense Account {0}

COGS from Inventory {0}

Tax Expense Account

Inventory Shrinkage {0}

Inventory Defective {0}

ROA Discounts

Coupons Issued ← Rich Rewards only

Close

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

GL Summary: New categories for Rich Rewards

Paladin POS Data Viewer

Purchase Orders Rewards Settings United Market Promo
Accounting Uploads ACH Review Customer A/R Customers Discounts EDI GL Summary IME

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

Totals Balance

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

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

Learn more

[Paladin 2021-A Release Guide](#)

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

Next webinar:

Paladin's Top 10 Most Overlooked Features

June 1 @ 9am PT

Register: portal.paladinpos.com/webinars



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