



Top 10 Most Overlooked Features

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Chief Experience Officer

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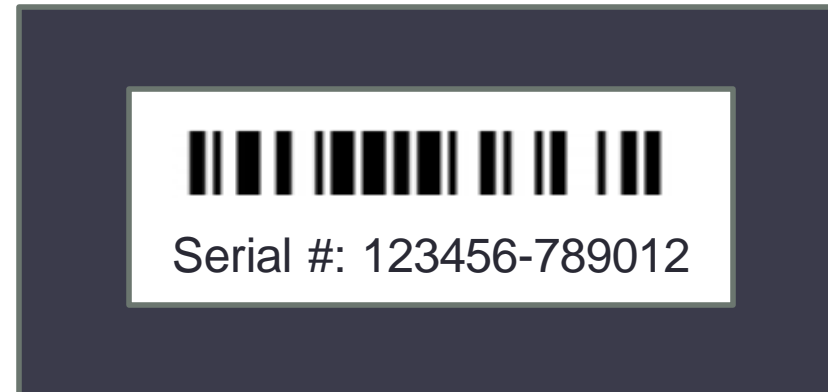
WHAT YOU'LL LEARN

- 1 – Serial number tracking
- 2 – Restricted items
- 3 – Inventory Count List
- 4 – Pointy integration
- 5 – Employee customer accounting control permissions
- 7 – Fixed Margin Pricing
- 8 – Capture return item invoice number
- 9 – Minimum margin protection by Department
- 10 – Invoice F4 discount respects minimum margin

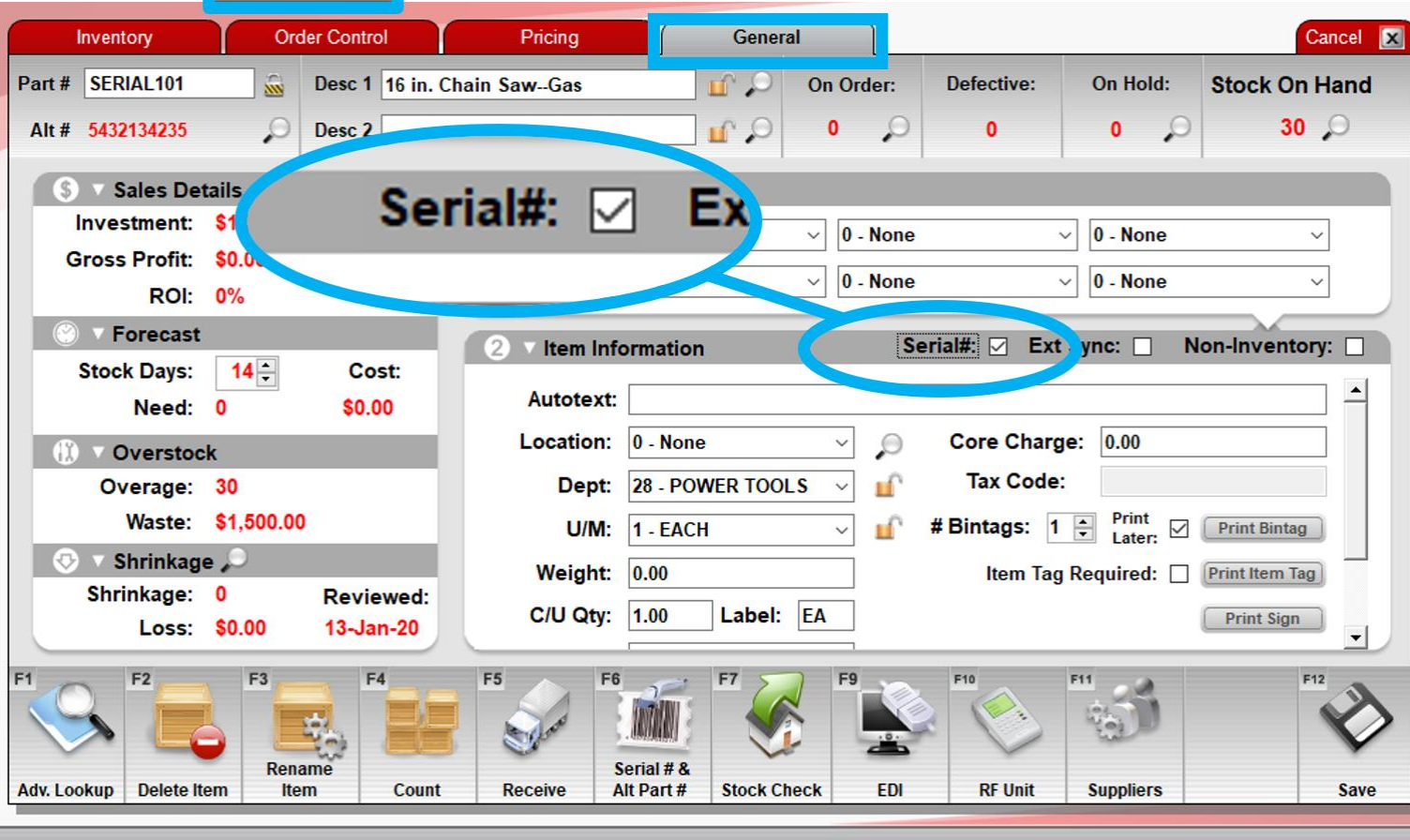
No. 1 – Serial number tracking

Serial number tracking

- Track serial numbered items when receiving and selling serialized equipment.
- See “sold vs. available” reports of serialized products.
- Choose from list of available serial numbers when selling products.
- Track unique receiving costs for each serialized number.



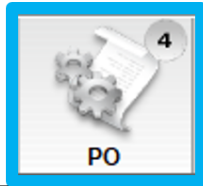
Identify serialized items in inventory



The screenshot shows the 'General' tab of the Inventory module. The 'Serial#' checkbox is checked and circled in blue. The 'Ext. Sync' checkbox is also checked and circled in blue. The 'Non-Inventory' checkbox is unchecked. The 'Part #' is SERIAL101 and the 'Desc 1' is 16 in. Chain Saw--Gas. The 'Stock On Hand' is 30. The 'Sales Details' section shows an investment of \$1,000.00, a gross profit of \$0.00, and an ROI of 0%. The 'Forecast' section shows 14 stock days and a cost of \$0.00. The 'Overstock' section shows an overage of 30 and a waste of \$1,500.00. The 'Shrinkage' section shows a shrinkage of 0 and a loss of \$0.00. The 'Item Information' section shows a location of 0 - None, a department of 28 - POWER TOOLS, a unit of measure of 1 - EACH, a weight of 0.00, and a core charge of 0.00. The 'C/U Qty' is 1.00 and the 'Label' is EA. The 'Print Bntag' button is visible.

- Serialized items are identified in the **Inventory** module on the **General** tab, by the **Serial#** checkbox.

Enter serial numbers during receiving



Receive PO Confirm Receive Cancel

PO # 1234 Supplier 12 - MY BEST SUPPLIER Address 2 Phone
 EDI Address 1 100 Main Street City/State/Zip Baltimore, MD, 21279-1047 Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
<input type="checkbox"/>			0	SERIAL #		
<input type="checkbox"/>			40	40	\$ 10.000	\$ 400.00
<input type="checkbox"/>			0			
<input type="checkbox"/>			5	5	\$ 150.000	\$ 750.00
<input type="checkbox"/>			0	SERIAL #		
			RD			
			EC			

Add 3 serial numbers

Enter Serial #:

Serial # Status

F12 Finish

F1 Advanced Lookup Add Note Zero Qty Received Displaying Open | All Recall Inventory Find PO Review RF Receiving Process

F8 Total \$ 1,300.00

- When you receive serialized items, you are prompted to enter serial numbers.
- Serialized items on the invoice have this ID: **SERIAL #**

Select serial numbers at checkout



Invoice / Quote **Checkout** Cancel

Rewards 99887766558 Customer 6295 - JOHN SMITH Address 2 Phone
Credit 0.00 Address 1 1500 MAIN AVE City/State/Zip NICE CITY, KS, 00000 Fax

Tax	Def	Net	Part	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL			0.00	\$ 160.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL				

SOH ORD

Add Serial Numbers Cancel

Enter or select 1 serial number for part # 'SERIAL101'

Enter Serial Number

Available Serial Numbers

- B24039542
- N24531215
- D23232242
- E98765432
- P92384859
- I12RE2341
- YISADFA1
- N31OIOU4
- Y12SRE12
- NWA4239
- PA134110
- F12342882L
- IIISORI219

Selected Serial Numbers

- A23424234

Select >>> <<< Remove

F12 Finish

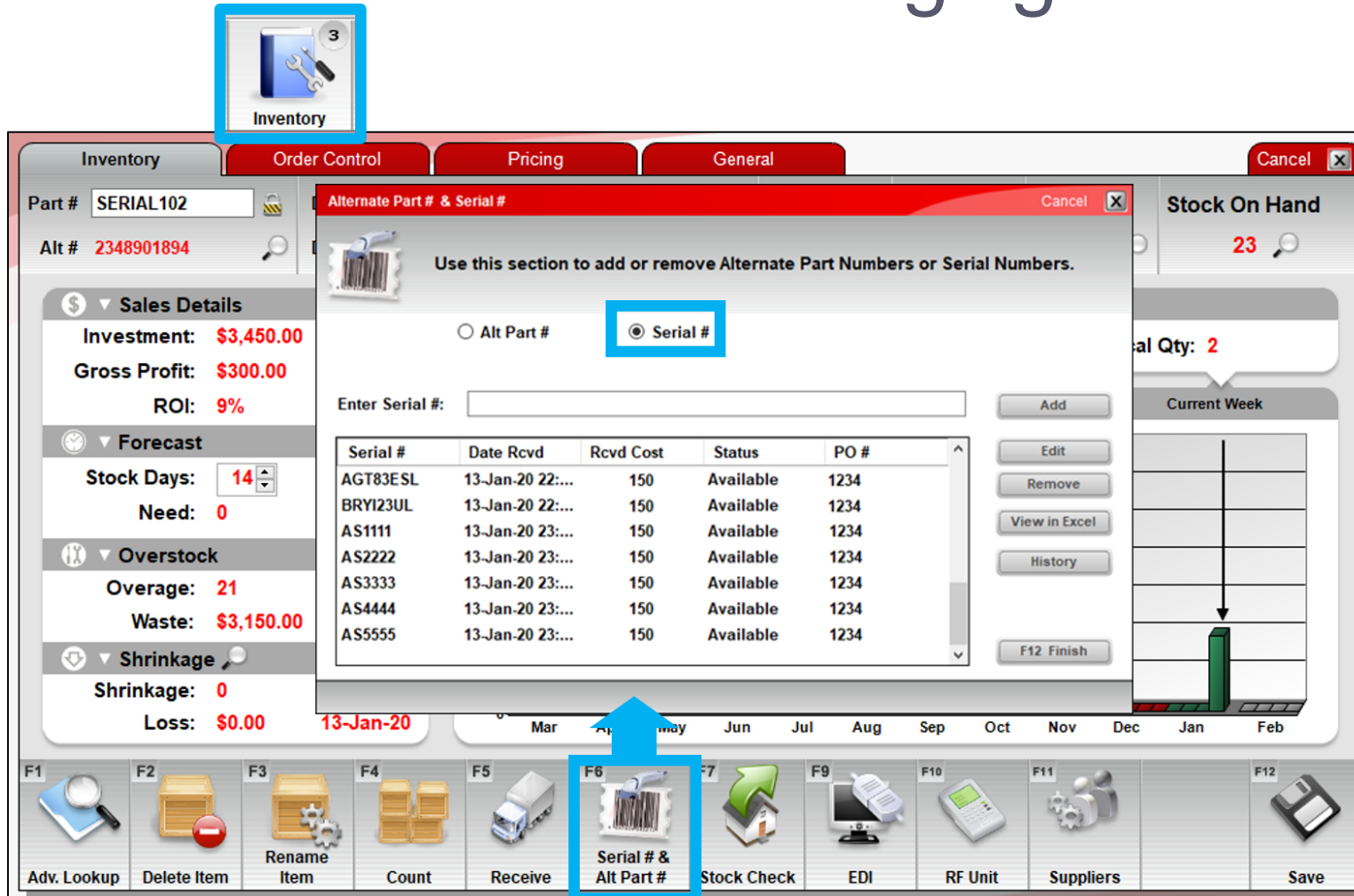
F1 F2

Advanced Lookup Add Note Delete Line Item Discount Item Account Payment Store Transaction Stock Check Checkout

Total \$	160.00
Tax \$	12.80
Total \$	172.80

- When you sell a serialized item, you are prompted to select the serial number.

Managing serial numbers



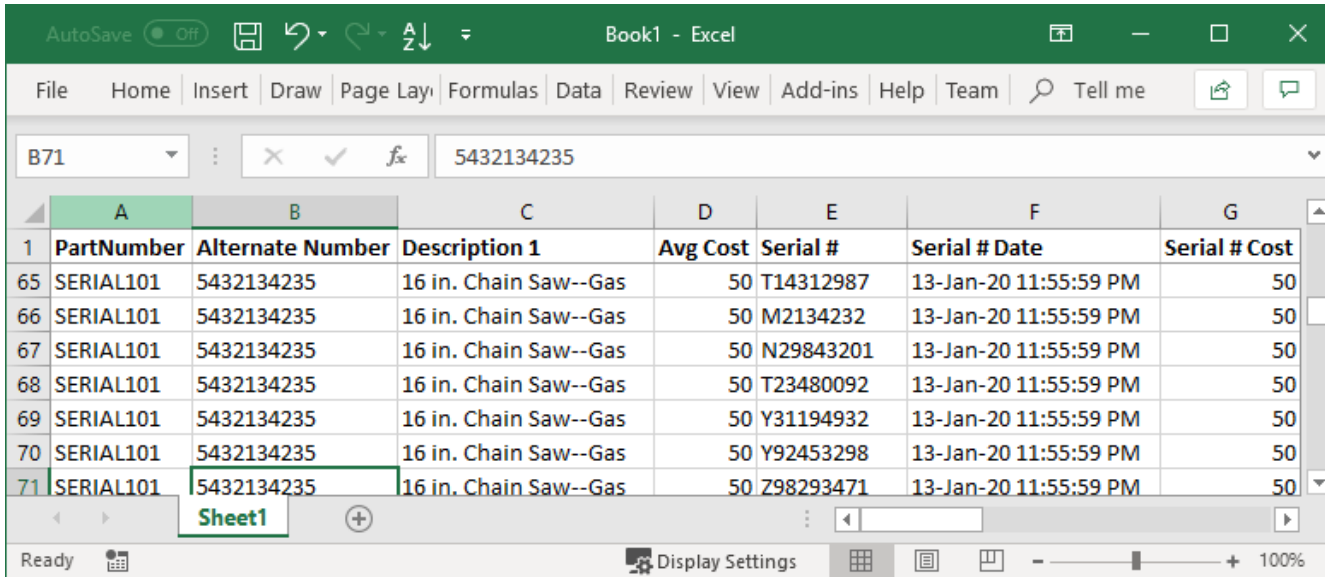
The screenshot shows the Inventory module interface. The 'Inventory' tab is active, and the 'Alternate Part # & Serial #' dialog box is open. The 'Serial #' radio button is selected and highlighted with a blue box. The dialog box contains a table of serial numbers and their details.

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

The interface also shows the 'Inventory' module icon at the top left, the 'Part # SERIAL102' and 'Alt # 2348901894' fields, and the 'Stock On Hand' section with a value of 23. The bottom toolbar includes icons for Adv. Lookup, Delete Item, Rename Item, Count, Receive, Serial # & Alt Part # (highlighted with a blue box), Stock Check, EDI, RF Unit, Suppliers, and Save.

- In the **Inventory** module, you can view and edit an item's available (in-stock) serial number list.

Serial Number List Report



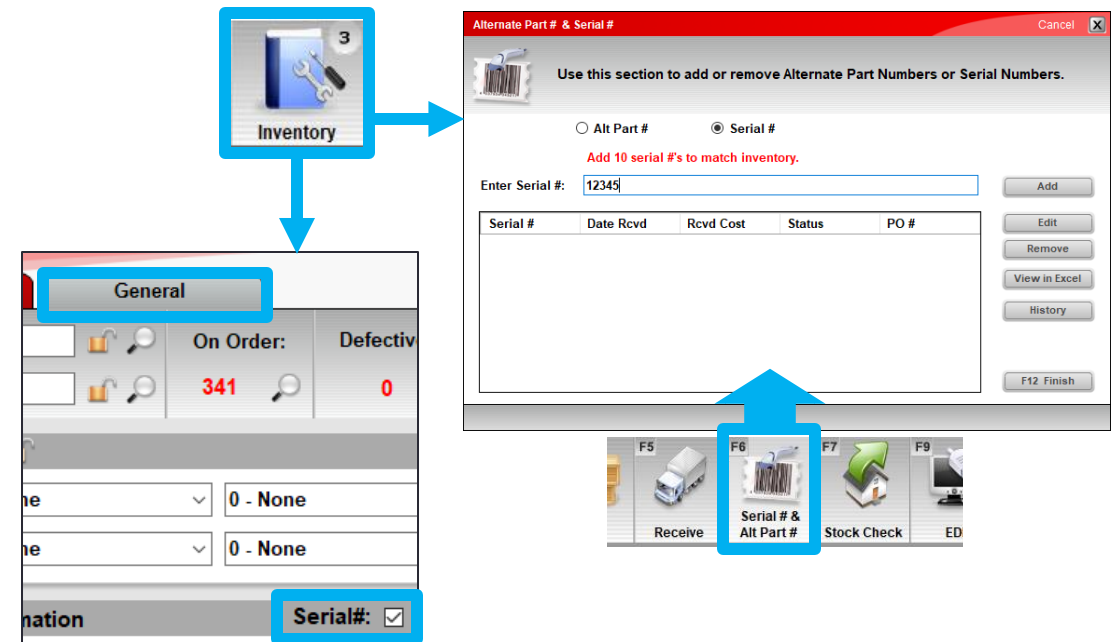
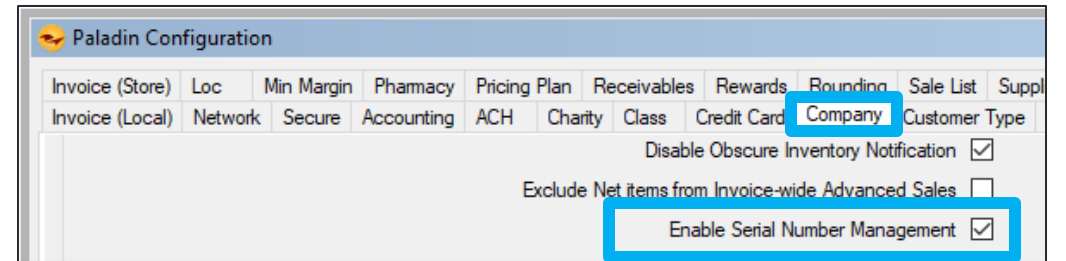
	A	B	C	D	E	F	G
1	PartNumber	Alternate Number	Description 1	Avg Cost	Serial #	Serial # Date	Serial # Cost
65	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T14312987	13-Jan-20 11:55:59 PM	50
66	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	M2134232	13-Jan-20 11:55:59 PM	50
67	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	N29843201	13-Jan-20 11:55:59 PM	50
68	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T23480092	13-Jan-20 11:55:59 PM	50
69	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y31194932	13-Jan-20 11:55:59 PM	50
70	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y92453298	13-Jan-20 11:55:59 PM	50
71	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Z98293471	13-Jan-20 11:55:59 PM	50

- In the **Reports** module, the **Serial Number List** report (under **Inventory > General**) provides a list of serial numbers sorted by item.
- Info includes status (sold, available), received cost and other data.

How to set up serialization

1. Go to **File > Setup > Company** tab.
2. In the **Inventory** settings, select **Enable Serial Number Management**.
3. In the **Inventory** module, open each serialized item and do this:
 - Select the **Serial #** checkbox (**General** tab).
 - Click **Serial # & Alt Part #** and enter serial numbers for your existing inventory.
 - **Save** your changes.

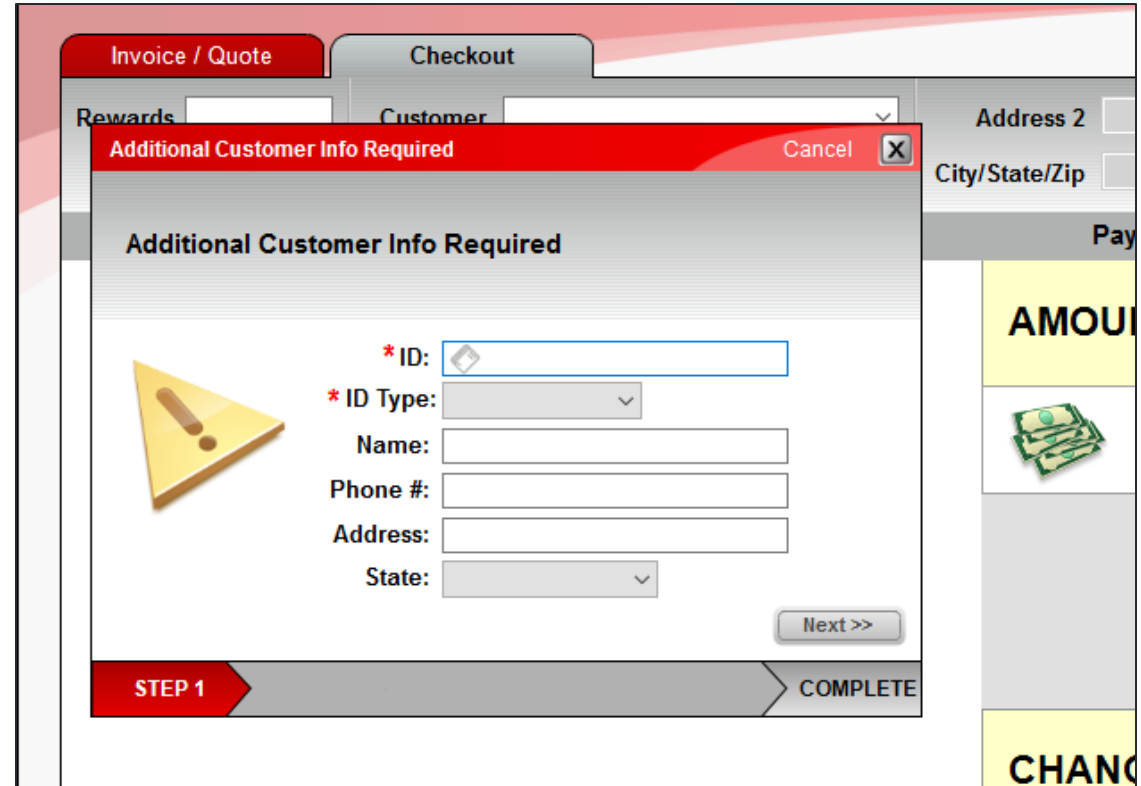
Afterward, when receiving and selling, you will be automatically prompted for serial numbers.



No. 2 – Restricted items

Restricted Items

- Require customer information at checkout for restricted items, such as spray paint, alcoholic beverages, and pharmaceutical purchases.
- When you add a restricted item to the invoice, you must scan the customer's driver's license or manually enter the customer information.



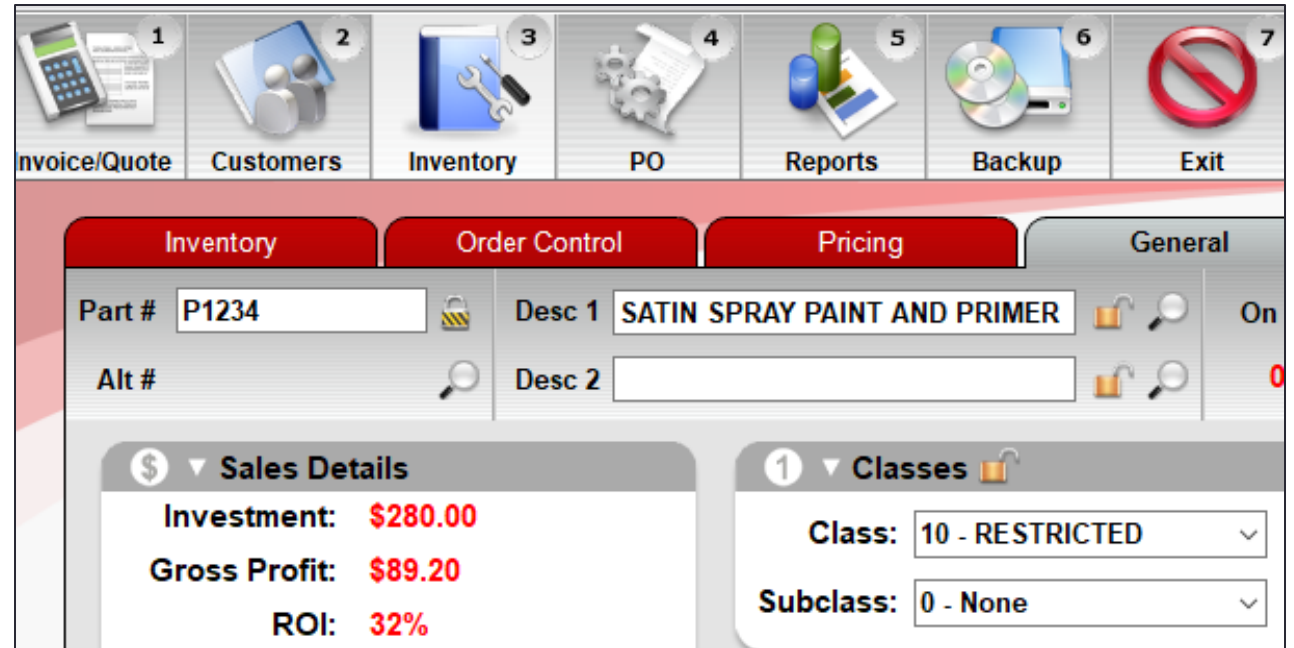
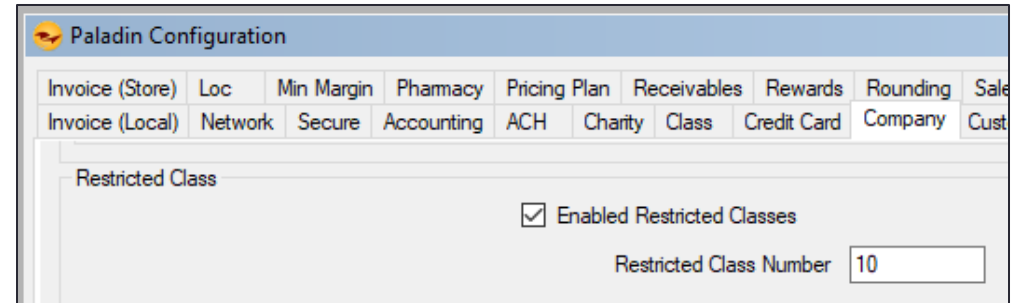
The screenshot displays a software interface with a modal dialog box titled "Additional Customer Info Required". The dialog is overlaid on a background window that has tabs for "Invoice / Quote" and "Checkout". The background window shows fields for "Rewards", "Customer", "Address 2", "City/State/Zip", and "Pay". The modal dialog contains a yellow warning triangle icon on the left. The form fields include:

- * ID:
- * ID Type:
- Name:
- Phone #:
- Address:
- State:

At the bottom right of the dialog is a "Next >>" button. At the bottom left of the dialog is a "STEP 1" indicator with a red arrow pointing right. At the bottom right of the dialog is a "COMPLETE" indicator with a grey arrow pointing right. A "Cancel" button with a close icon is located in the top right corner of the dialog.

How to set up the restricted items feature

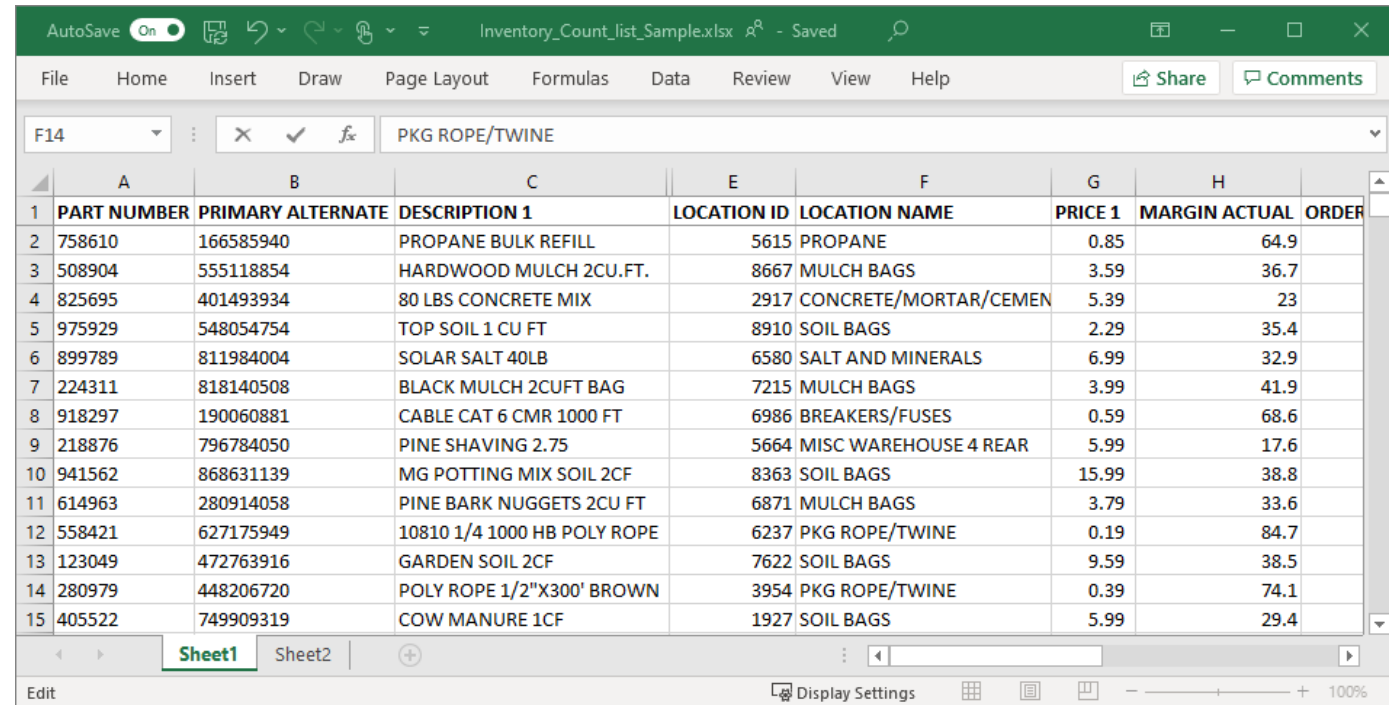
1. Create a class for restricted items.
2. Go to **File > Setup > Company** tab.
3. Select **Enabled Restricted Classes** and enter the restricted class ID.
4. Save your changes.
5. Add the class to all restricted items in your inventory.



No. 3 – Inventory Count List

Inventory Count List Report

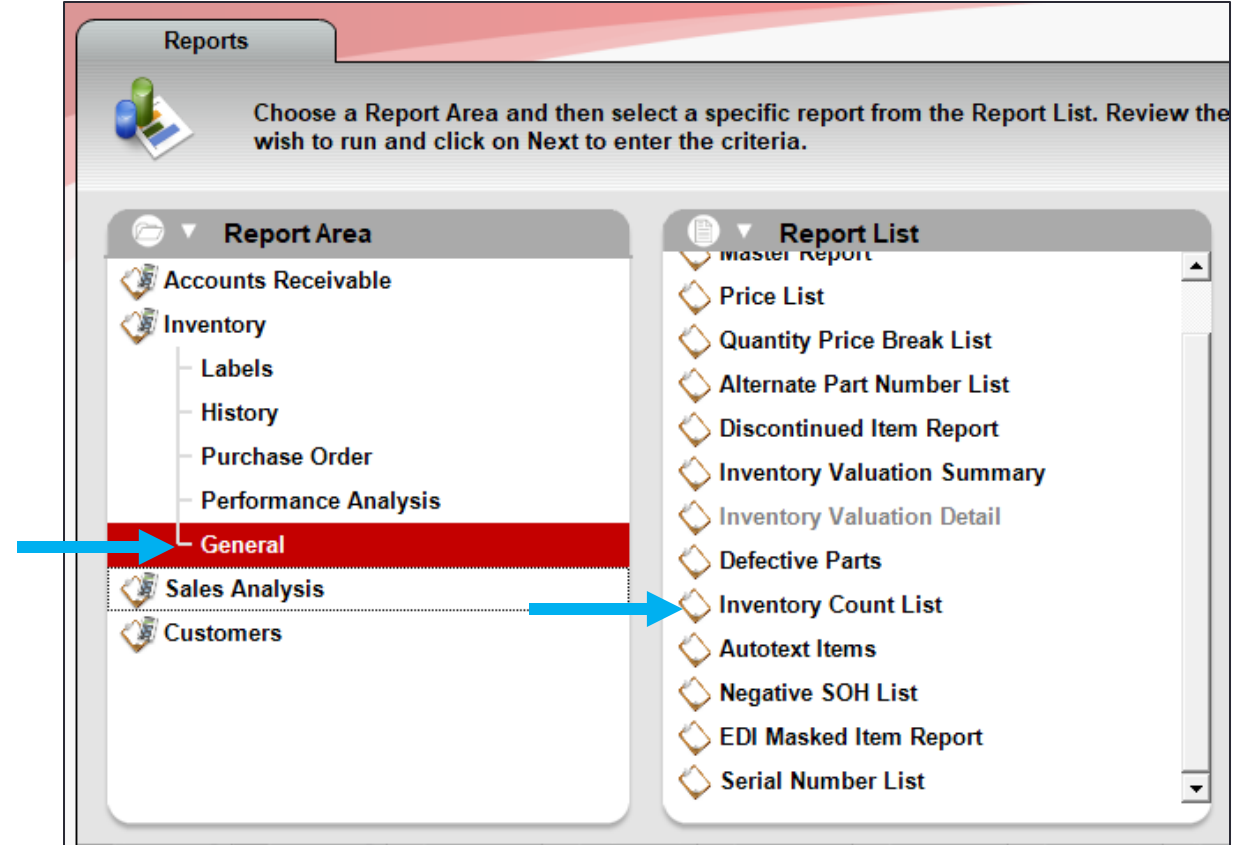
- Use the report to assess your store.
- Look for:
 - Upside down margins
 - Last counted and last received dates
 - Top 10, 20, or 100 sellers
 - Supplier Ratio anomalies
- Compare YTD sales with last 6 weeks.



	A	B	C	E	F	G	H	
1	PART NUMBER	PRIMARY ALTERNATE	DESCRIPTION 1	LOCATION ID	LOCATION NAME	PRICE 1	MARGIN ACTUAL	ORDER
2	758610	166585940	PROPANE BULK REFILL	5615	PROPANE	0.85	64.9	
3	508904	555118854	HARDWOOD MULCH 2CU.FT.	8667	MULCH BAGS	3.59	36.7	
4	825695	401493934	80 LBS CONCRETE MIX	2917	CONCRETE/MORTAR/CEMEN	5.39	23	
5	975929	548054754	TOP SOIL 1 CU FT	8910	SOIL BAGS	2.29	35.4	
6	899789	811984004	SOLAR SALT 40LB	6580	SALT AND MINERALS	6.99	32.9	
7	224311	818140508	BLACK MULCH 2CUFT BAG	7215	MULCH BAGS	3.99	41.9	
8	918297	190060881	CABLE CAT 6 CMR 1000 FT	6986	BREAKERS/FUSES	0.59	68.6	
9	218876	796784050	PINE SHAVING 2.75	5664	MISC WAREHOUSE 4 REAR	5.99	17.6	
10	941562	868631139	MG POTTING MIX SOIL 2CF	8363	SOIL BAGS	15.99	38.8	
11	614963	280914058	PINE BARK NUGGETS 2CU FT	6871	MULCH BAGS	3.79	33.6	
12	558421	627175949	10810 1/4 1000 HB POLY ROPE	6237	PKG ROPE/TWINE	0.19	84.7	
13	123049	472763916	GARDEN SOIL 2CF	7622	SOIL BAGS	9.59	38.5	
14	280979	448206720	POLY ROPE 1/2"X300' BROWN	3954	PKG ROPE/TWINE	0.39	74.1	
15	405522	749909319	COW MANURE 1CF	1927	SOIL BAGS	5.99	29.4	

How to create the Inventory Count List Report

1. In Paladin, open the **Reports** module.
2. In the **Report Area** pane, select **Inventory > General**.
3. In the **Report List** pane, select **Inventory Count List** and then click **Next** or press F12.
4. Optional: Set filters.
5. Click **Run Report** or press F12.



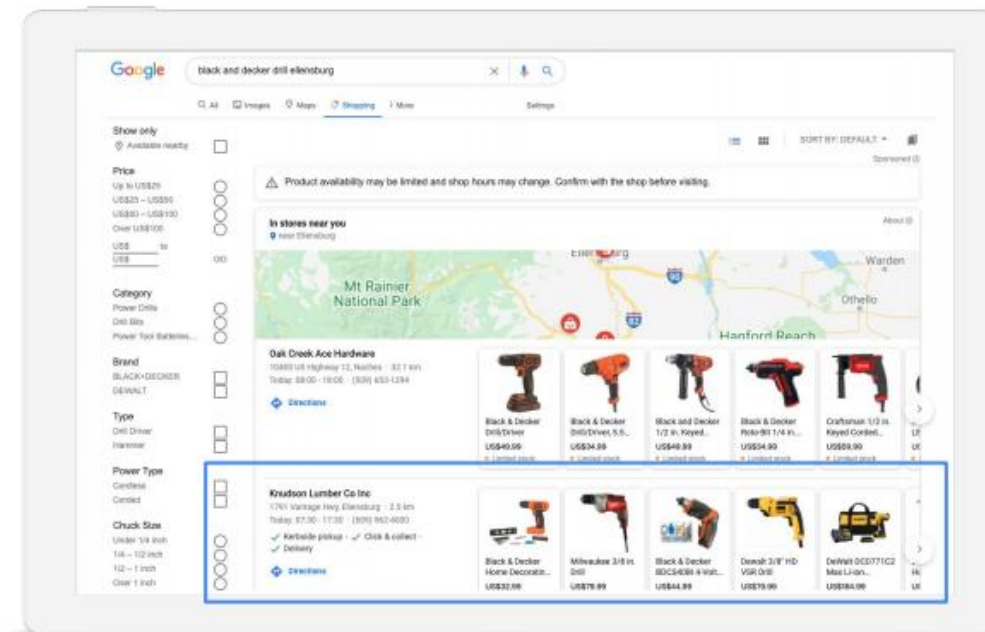
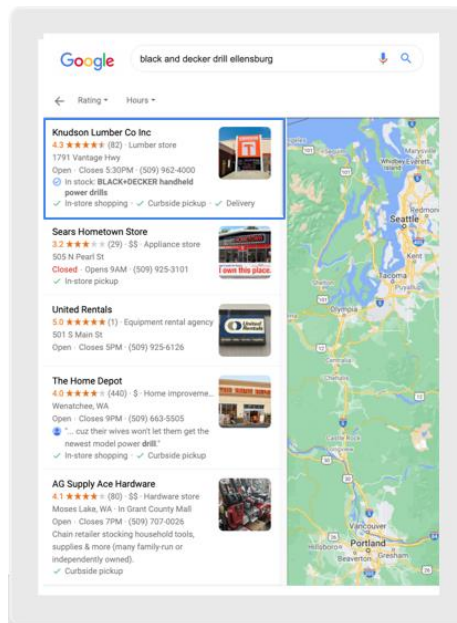
Inventory Count List values

- PART NUMBER
- PRIMARY ALTERNATE
- DESCRIPTION 1
- DESCRIPTION 2
- LOCATION ID
- LOCATION NAME
- RETAIL PRICE
- MARGIN ACTUAL
- ORDER QUANTITY
- MINIMUM STOCK
- MAXIMUM STOCK
- YTD SALES (past 365 days)
- PAST 6 WEEK SALES
- AVERAGE COST
- LAST COST
- SUPPLIER RATIO
- STOCK ON HAND
- COUNTED QUANTITY
- ON ORDER AMOUNT
- LAST DATE COUNTED
- LAST DATE RECEIVED

No. 4 – Pointy integration

Paladin's Pointy Integration

- Pointy enhances your digital footprint by using your unique inventory and pricing to promote your store and products within local Google searches.
- Basic Pointy service and integration are free for Paladin clients.



How to get started with Pointy

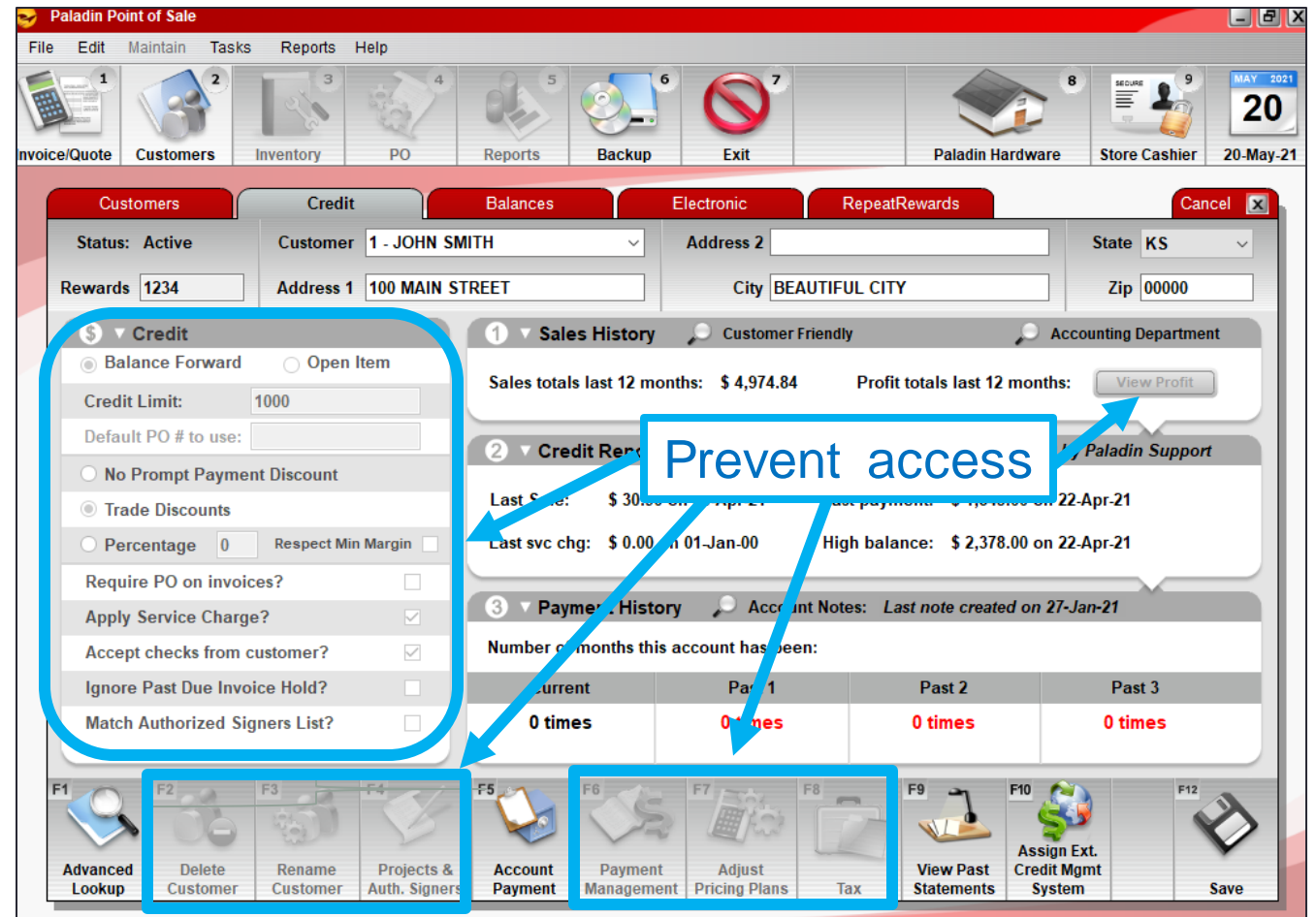
1. Go to pointy.com/paladin to sign up.
2. Paladin Support is automatically notified and will contact you to set up the integration.
3. After the integration is set up, Paladin updates Pointy nightly with:
 - Inventory data (UPC code, price, and SOH)
 - Daily sales (UPC code and sold quantity)



No. 5 – Employee customer accounting control permissions

Accounting control permissions

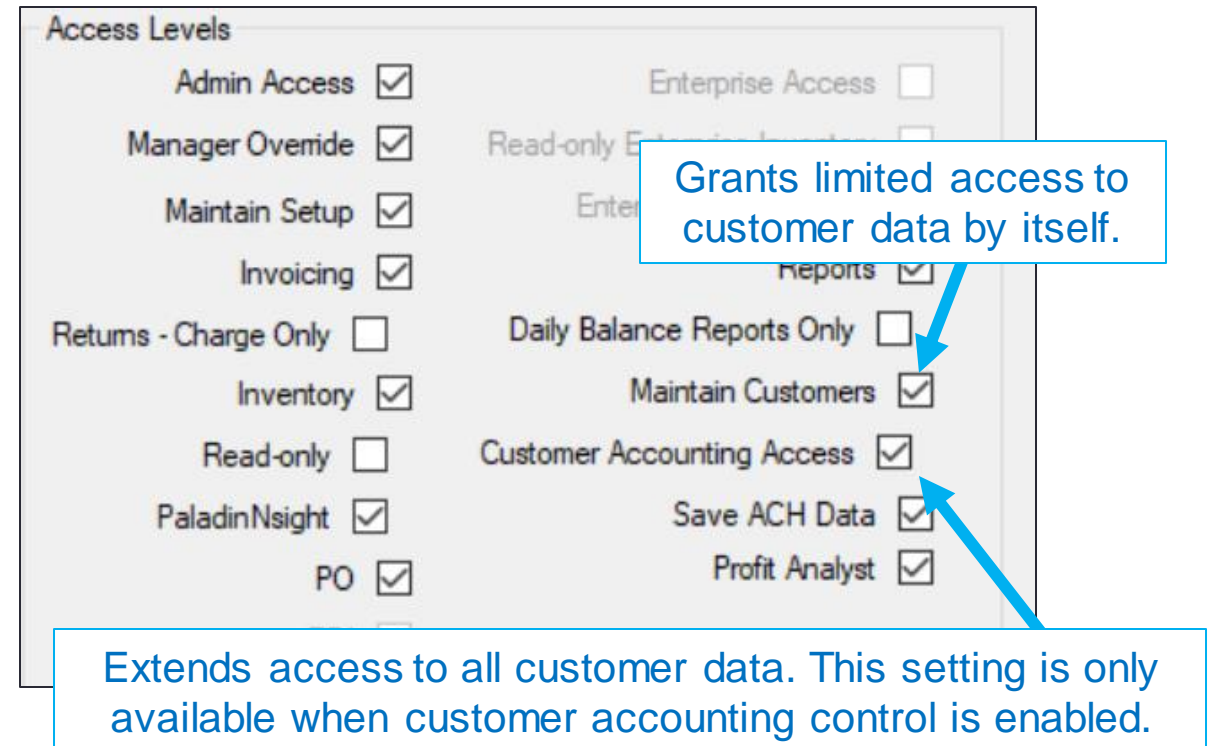
- Prevent employees from adding or modifying customer credit limits, authorized signers, projects, and pricing plan discounts.
- Prevent employees from deleting or renaming customer accounts.
- Employees can still add new customers and take account payments.



How to set up customer accounting control

1. Step one: Go to **File > Setup > Company** tab, select **Allow Customer Accounting Control Per Employee**.
2. Step two: Go to **File > Setup > Employees** tab.
3. Update permissions for every employee.
 - **Limited:** Select **Maintain Customers** only.
 - **Full:** Select **Maintain Customers** and **Customer Accounting Access**.

Note: The customer accounting control feature changes how customer data access is granted. In this picture, the feature is enabled.



Access Levels

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Access <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Reports <input checked="" type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Daily Balance Reports Only <input type="checkbox"/>
Returns - Charge Only <input type="checkbox"/>	Maintain Customers <input checked="" type="checkbox"/>
Inventory <input checked="" type="checkbox"/>	Customer Accounting Access <input checked="" type="checkbox"/>
Read-only <input type="checkbox"/>	Save ACH Data <input checked="" type="checkbox"/>
PaladinNsight <input checked="" type="checkbox"/>	Profit Analyst <input checked="" type="checkbox"/>
PO <input checked="" type="checkbox"/>	

Grants limited access to customer data by itself.

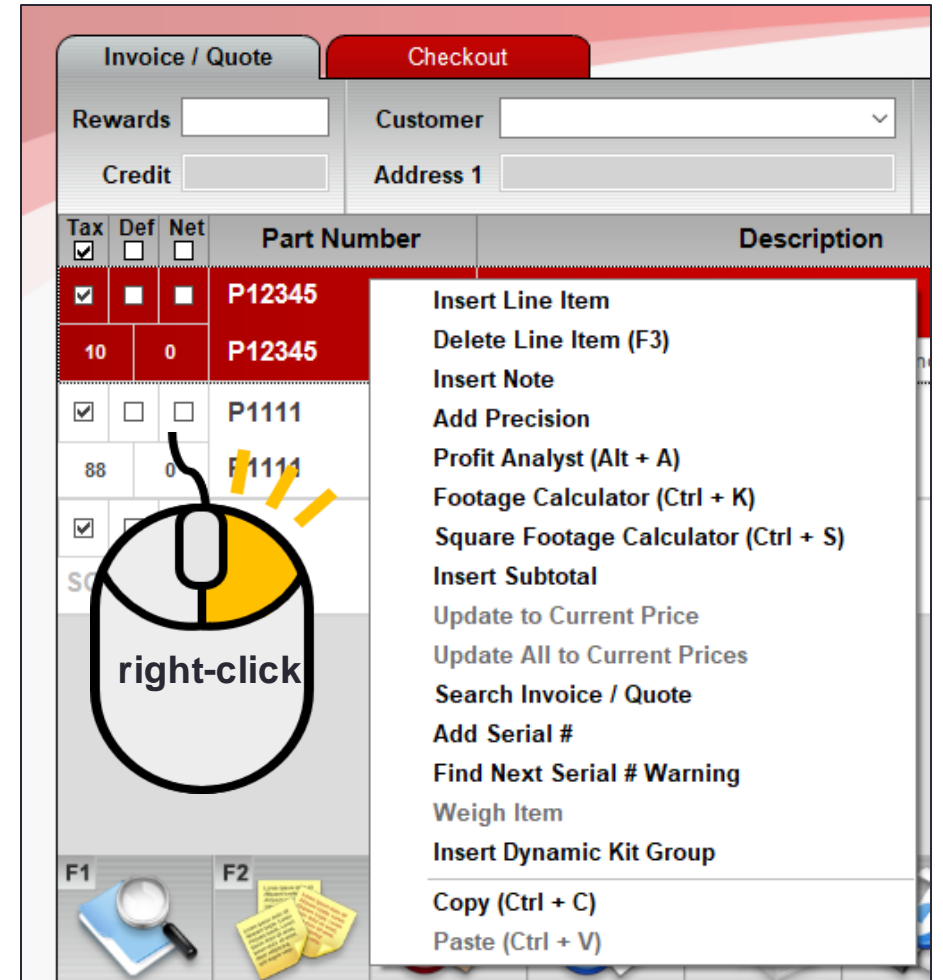
Extends access to all customer data. This setting is only available when customer accounting control is enabled.

No. 6 – Right click features

Right click features

- Speed up invoicing and purchase order processing with our new quick access menus.
- **Invoice/Quote** module: Right-click any invoice line item and get immediate access to commonly-used tasks, tools and new features.
- No set up required.

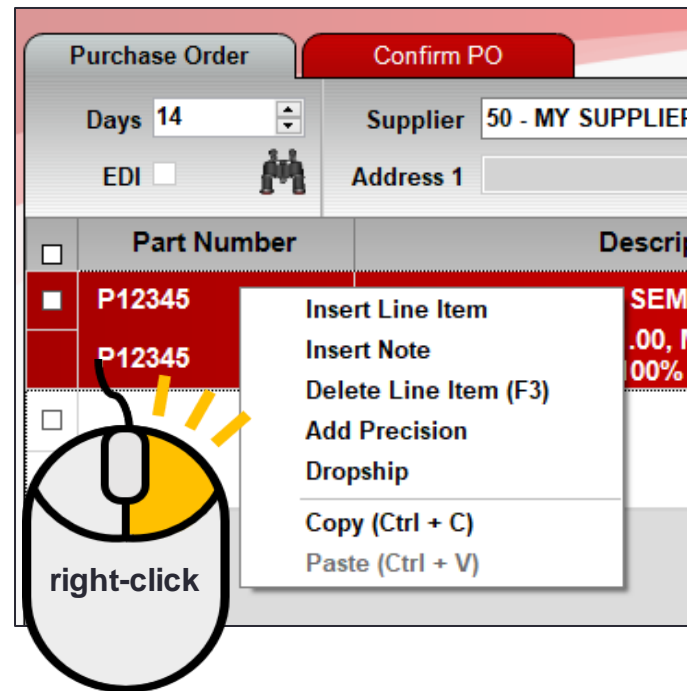
Invoice/Quote menu



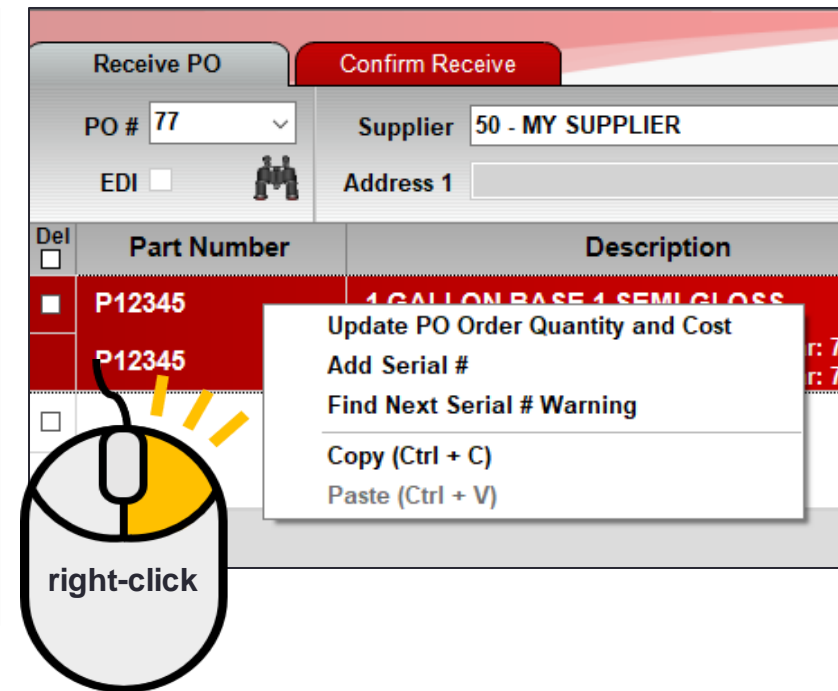
The screenshot displays the 'Invoice / Quote' module interface. At the top, there are tabs for 'Invoice / Quote' and 'Checkout'. Below the tabs, there are input fields for 'Rewards', 'Credit', 'Customer', and 'Address 1'. The main area is a table with columns for 'Tax', 'Def', 'Net', 'Part Number', and 'Description'. A right-click context menu is open over a line item with 'Part Number' P12345. The menu items include: 'Insert Line Item', 'Delete Line Item (F3)', 'Insert Note', 'Add Precision', 'Profit Analyst (Alt + A)', 'Footage Calculator (Ctrl + K)', 'Square Footage Calculator (Ctrl + S)', 'Insert Subtotal', 'Update to Current Price', 'Update All to Current Prices', 'Search Invoice / Quote', 'Add Serial #', 'Find Next Serial # Warning', 'Weigh Item', 'Insert Dynamic Kit Group', 'Copy (Ctrl + C)', and 'Paste (Ctrl + V)'. A mouse cursor is shown clicking on the table, with the text 'right-click' written on the mouse. At the bottom of the interface, there are icons for 'F1' (magnifying glass) and 'F2' (sticky notes).

Right click features

- **PO** module: Right-click any purchase order line item on a purchase order for quick access to many features.
- Different menus appear for PO creation and receiving.



Create PO menu



Receive PO menu

No. 7 – Fixed Margin Pricing

Fixed Margin Pricing

- Automate price updates based on cost when receiving purchase orders manually or through EDI.

During the **Receive PO** process, retail prices will automatically adjust to cost changes.

1 Item Cost		Last:	
Avg:	Mkt:	Cost	Qty / Date
1.588	1.588	1.588	72 15-May-17
Cost Per: Item			

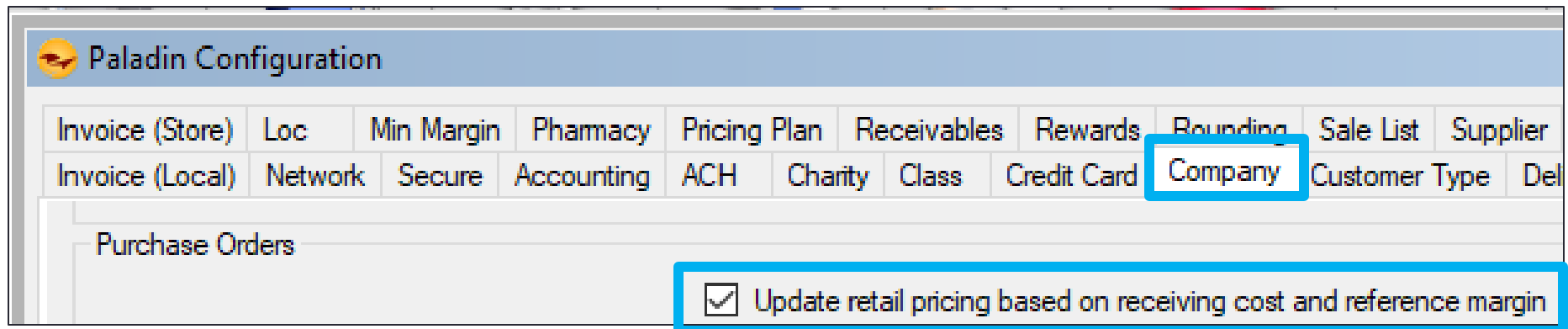
2 Pricing Levels		Net:	Flex:	Sensitive:	Taxable:
Quantity	Sale Price	Margin	Mkt Margin	Ref	Rounding
1	2.94	46.0	46.0	46	Default
2	0.00	0	0	0	
3	0.00	0	0	0	
4	0.00	0	0	0	

The last **Cost** is used to calculate the new Retail Price based on the **Ref** (reference) margin.

This margin will remain fixed.

How to set up fixed margin pricing

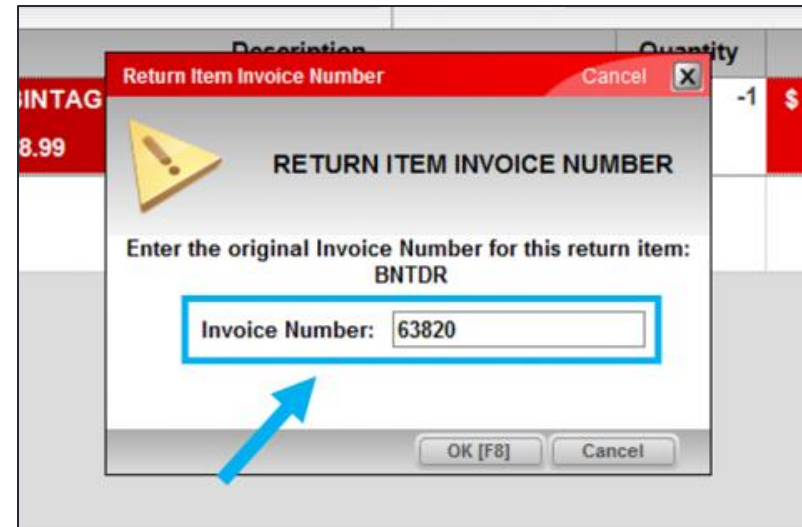
1. Go to **File > Setup > Company** tab.
2. In the **Purchase Orders** pane, select **Update retail pricing based on receiving cost and reference margin**.
3. Save and restart Paladin.



No. 8 – Capture return item
invoice number


Capture return item invoice number

- Prevent employees from processing a return without an invoice.
- Prompts for the invoice number when a return (- #) is entered.
- The original invoice number is added to the new invoice.
- Also adds original invoice via advanced lookup history tab.



Capture return item invoice number - exceptions

- Messages appear when:
 - Invoice number is not found.
 - Part number is not on the invoice.
- If you skip the invoice number step (click **Cancel**), a note is added to the return invoice.



Return Item Invoice Number

RETURN ITEM INVOICE NUMBER

Enter the original Invoice Number for this return item:
BNTDY

Invoice Number: 57811

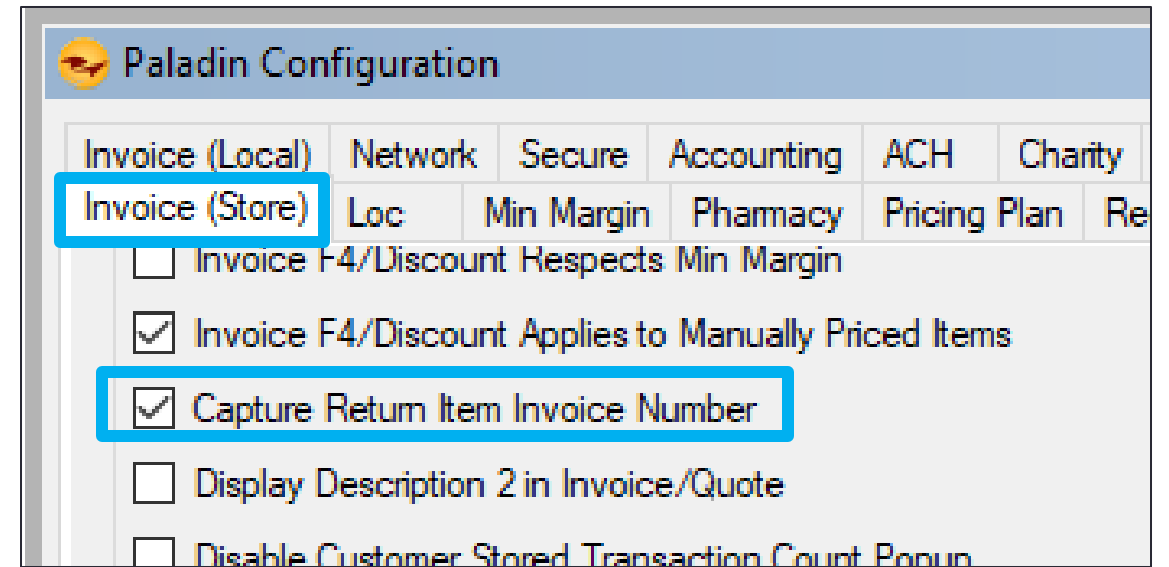
*Part Number Not Found On Invoice

OK [F8] Cancel

0	BNTDR	58.99
Return Item: BNTDR - Original Invoice # Skipped by cashier		

How to set up the return item invoice number prompt

1. Go to **File > Setup > Invoice (Store)** tab.
2. Select **Capture Return Item Invoice Number** .
3. Click **Save**.

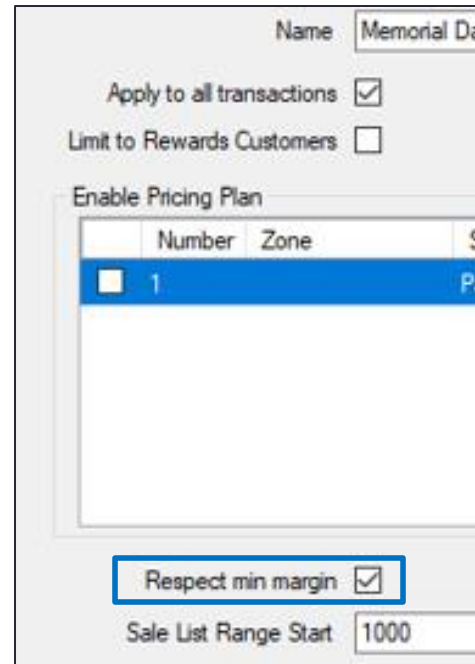


No. 9 – Minimum margin protection by Department

Minimum margin protection by Department

- Protect your profits by setting the minimum margin by department.
- Minimum margins can be applied multiple places in Paladin (examples shown).
- Department-level minimum margins will override the storewide minimum margin.

Pricing Plans

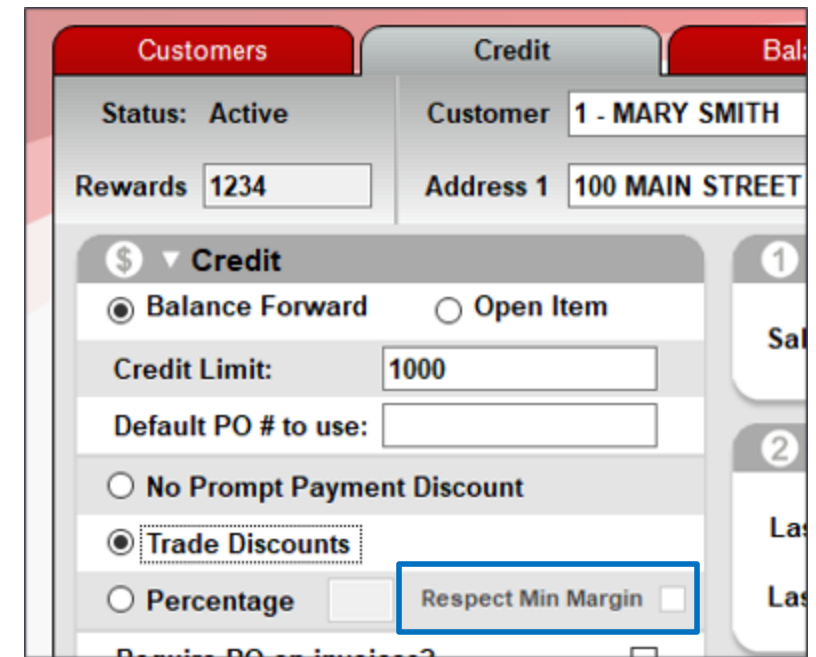


Name: Memorial Day
 Apply to all transactions
 Limit to Rewards Customers
 Enable Pricing Plan

Number	Zone	Status
<input type="checkbox"/> 1		Pa

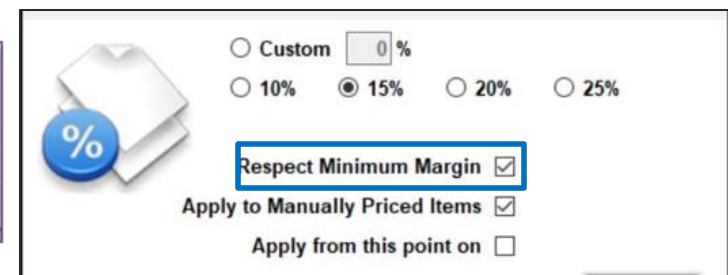
 Respect min margin
 Sale List Range Start: 1000

Prompt Payment discounts



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:
 No Prompt Payment Discount
 Trade Discounts
 Percentage | Respect Min Margin

Manual discounts

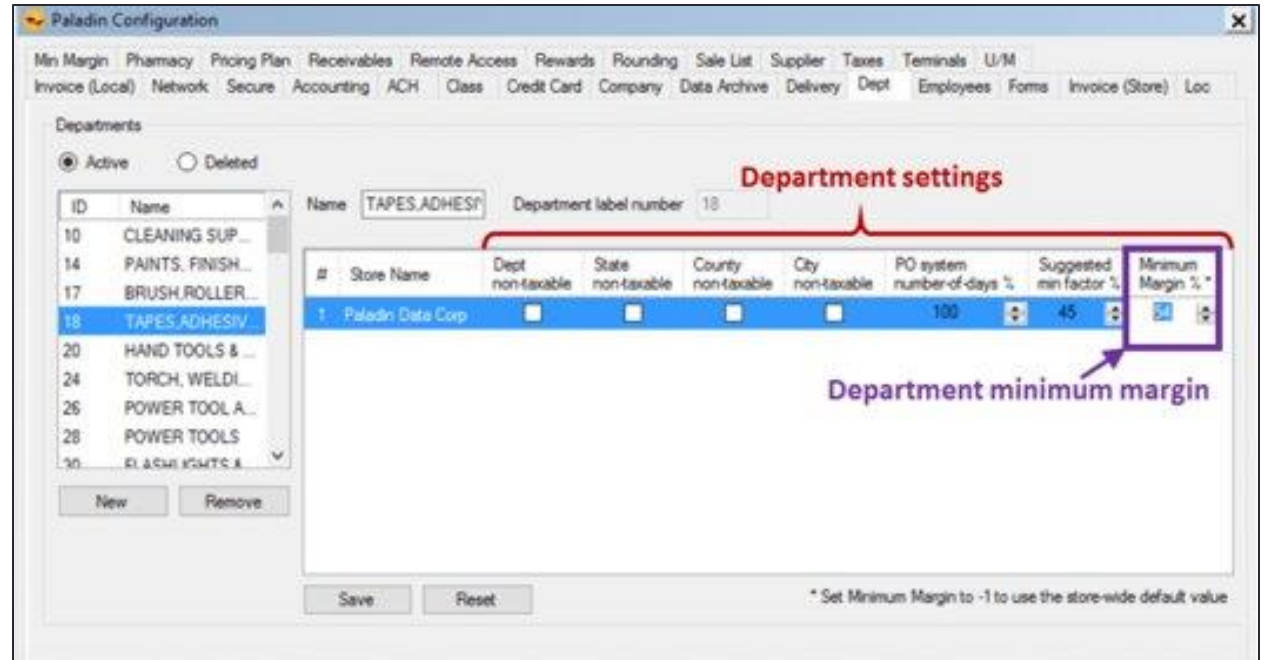



Custom %
 10% | 15% | 20% | 25%
 Respect Minimum Margin
 Apply to Manually Priced Items
 Apply from this point on

How to set a minimum margin by Department

1. Go to **File > Setup > Dept** tab.
2. Select a department, enter the **Min Margin %**.
3. Click **Save**.

Note: When you see a (-1) in the Minimum Margin field, it means it is blank (null) and has not yet been set.



Paladin Configuration

Min Margin Pharmacy Pricing Plan Receivables Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M
 Invoice (Local) Network Secure Accounting ACH Class Credit Card Company Data Archive Delivery Dept Employees Forms Invoice (Store) Loc

Departments

Active Deleted

Department settings

Name: TAPES.ADHESIV Department label number: 18

#	Store Name	Dept non-taxable	State non-taxable	County non-taxable	City non-taxable	PO system number-of-days %	Suggested min factor %	Minimum Margin % *
1	Paladin Data Corp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	45	

Department minimum margin

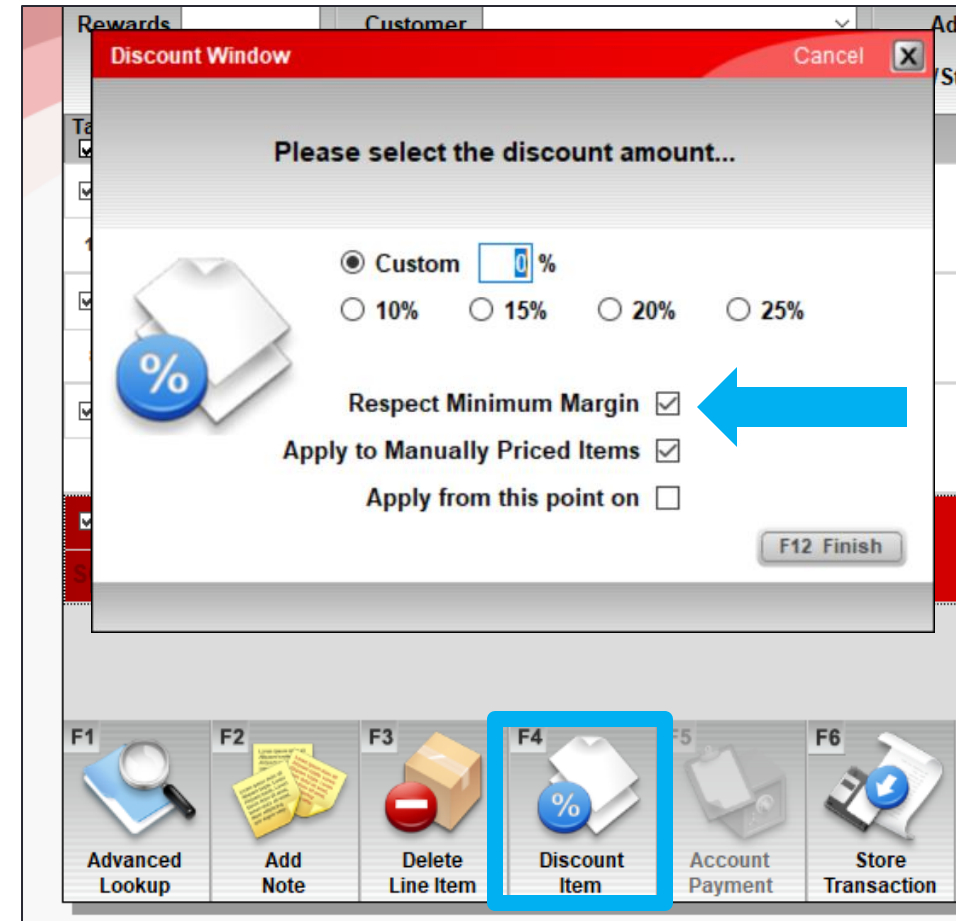
Save Reset

* Set Minimum Margin to -1 to use the store-wide default value

No. 10 – Invoice F4 discount
respects minimum margin

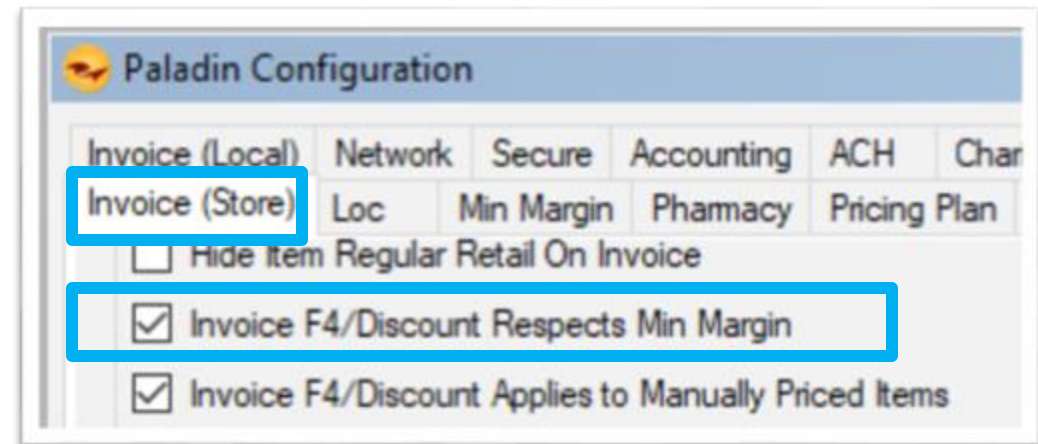
F4 discount respects minimum margin

- F4 discounts at checkout can automatically respect your store's minimum margin.
- Manager approval will be required to override this protection.



How to require F4 discounts to respect minimum margin

1. Go to **File > Setup > Invoice (Store)** tab.
2. In the Invoice pane, select **Invoice/F4 Discount Respects Min Margin**.
3. Click **Save**.



Learn more

- Paladin Help Portal (<http://portal.paladinpos.com>)
 - [Webinar: Track Inventory with Our New Serialization Feature](#)
 - [Webinar: Protect Your Profits with Paladin](#)
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Q+A

Next Webinar:
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