



# Automating Sales, Promotions and Trade Discounts

Charles Owen

*Chief Experience Officer*

June 7, 2022

## **WHAT YOU'LL LEARN**

### Automating sales and promotions

- Various types of promotions
- Discount types
- Cascading sales
- Trade discounts
  - How trade discounts differ from promotional sales
- Benefits of sales, promotions, and trade discounts
- How to setup and activate sales in Paladin
  - Basic structure of a sale
  - How to create a sale list
  - How to create a pricing plan
- BOGOs
  - Set up a BOGO sales list
  - Set up a BOGO pricing plan

## Various types of promotions



- Individual product discounts
- Blanket sale discounts -- by department, class, subclass, or supplier
- Customer trade incentive discounts
- Customer loyalty only discounts
- Store brand promotions and loyalty programs
- Auto-activated promotions by date range
- BOGO (Buy one get one) and BOGA (Buy one get any) Sales

## Discount Types



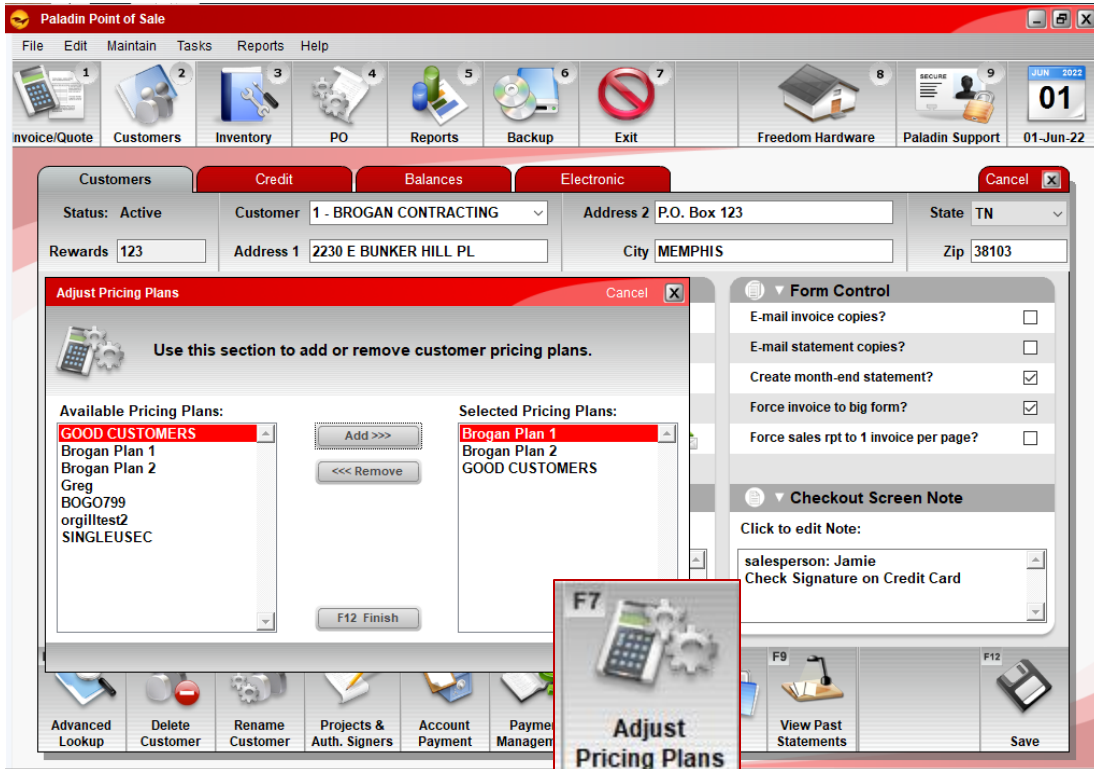
- Fixed Sale Price
- Retail with discount percentage
- Cost with markup percentage
- Quantity Discount Breaks
- Manual price changes at checkout
- Coupons

## Cascading sales

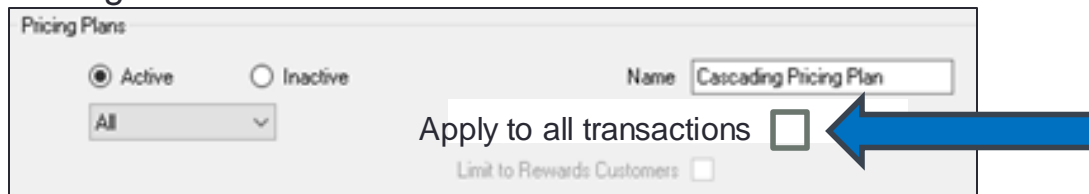


- A cascading sale offers progressive discounts on close-out items.
- Example:
  - Items start out at a 20% discount.
  - After two weeks, discount increases to 30%.
  - After two more weeks, discount increases to 50%.

# Trade discounts



## Pricing Plans



How trade discounts differ from promotional sales

- Trade discounts are no different than any other promotion or sale except that they are reserved and may be assigned to specific customers in the **Customers** module.
- This is accomplished by not checking the box **“Apply to all transactions”** within the **Pricing Plan** configuration and setup window.

## Benefits of sales, promotions and trade discounts



*“Everyone loves a bargain”*

- Provides upsell opportunities.
- Helps to stimulate new customer acquisition.
- Incentivizes local businesses and loyal customers to shop more often.
- Increases average ticket sale price contributing to higher profits.
- Helps to build a deeper connection with customers.
- Gives your store a competitive edge.

## How to setup and activate sales in Paladin

### Basic structure of a sale

Individual sale items  
may be contained in a  
“Sale List” and subject  
to rules set forth in the  
“Pricing Plan”

**Sale List + Pricing Plan ≡ Discount**

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~ or ~

A “Pricing Plan” can be used  
independently from a “Sale  
List” and include blanket  
sales by department, class,  
supplier, date range, etc.

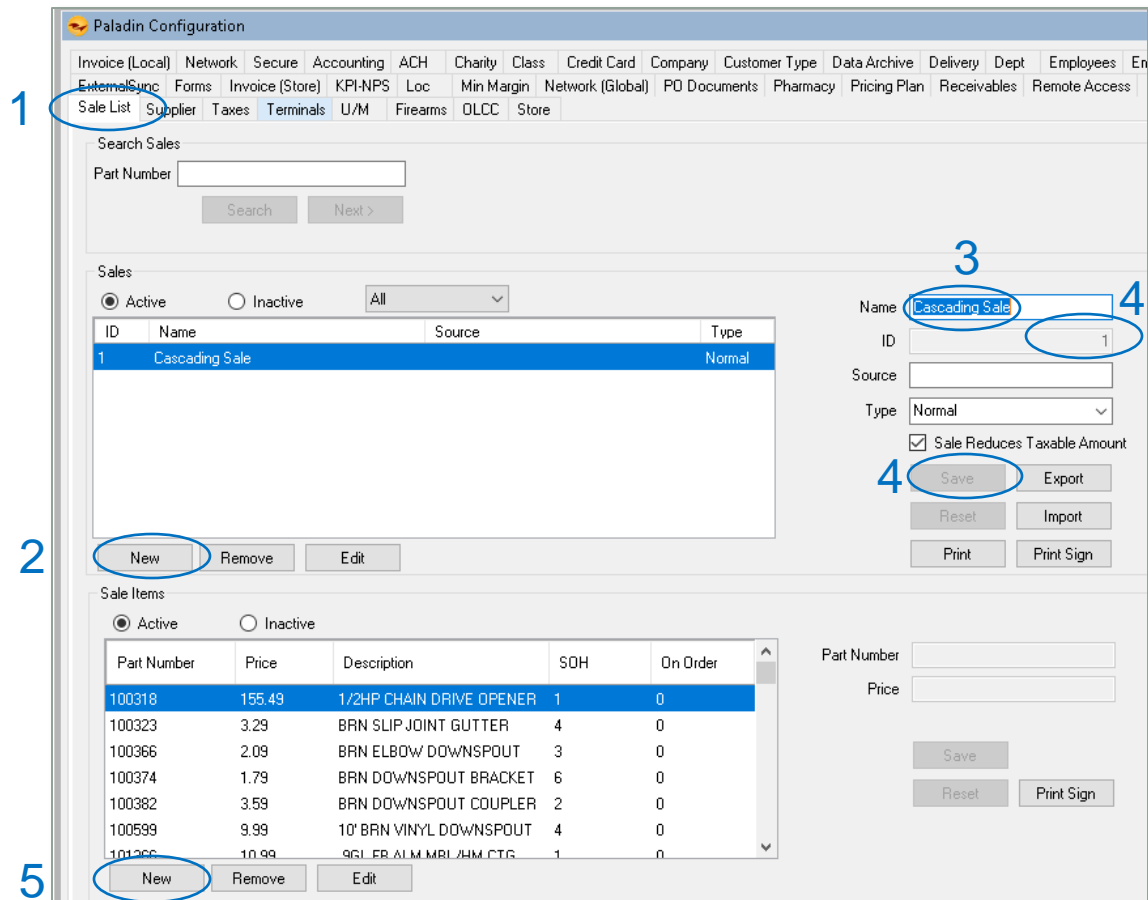
**Pricing Plan ≡ Discount**

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# How to setup and activate sales in Paladin

## How to create a sale list



Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees En  
External Sync Forms Invoice (Store) KPI-NPS Loc Min Margin Network (Global) PO Documents Pharmacy Pricing Plan Receivables Remote Access  
Sale List Supplier Taxes Terminals U/M Firearms DLCC Store

Search Sales  
Part Number   
Search Next >

Sales  
 Active  Inactive All

ID	Name	Source	Type
1	Cascading Sale		Normal

Sale Items  
 Active  Inactive

Part Number	Price	Description	SOH	On Order
100318	155.49	1/2HP CHAIN DRIVE OPENER	1	0
100323	3.29	BRN SLIP JOINT GUTTER	4	0
100366	2.09	BRN ELBOW DOWNSPOUT	3	0
100374	1.79	BRN DOWNSPOUT BRACKET	6	0
100382	3.59	BRN DOWNSPOUT COUPLER	2	0
100599	9.99	10' BRN VINYL DOWNSPOUT	4	0
101266	10.99	9GL BR ALUM MRL JHM CTG	1	0

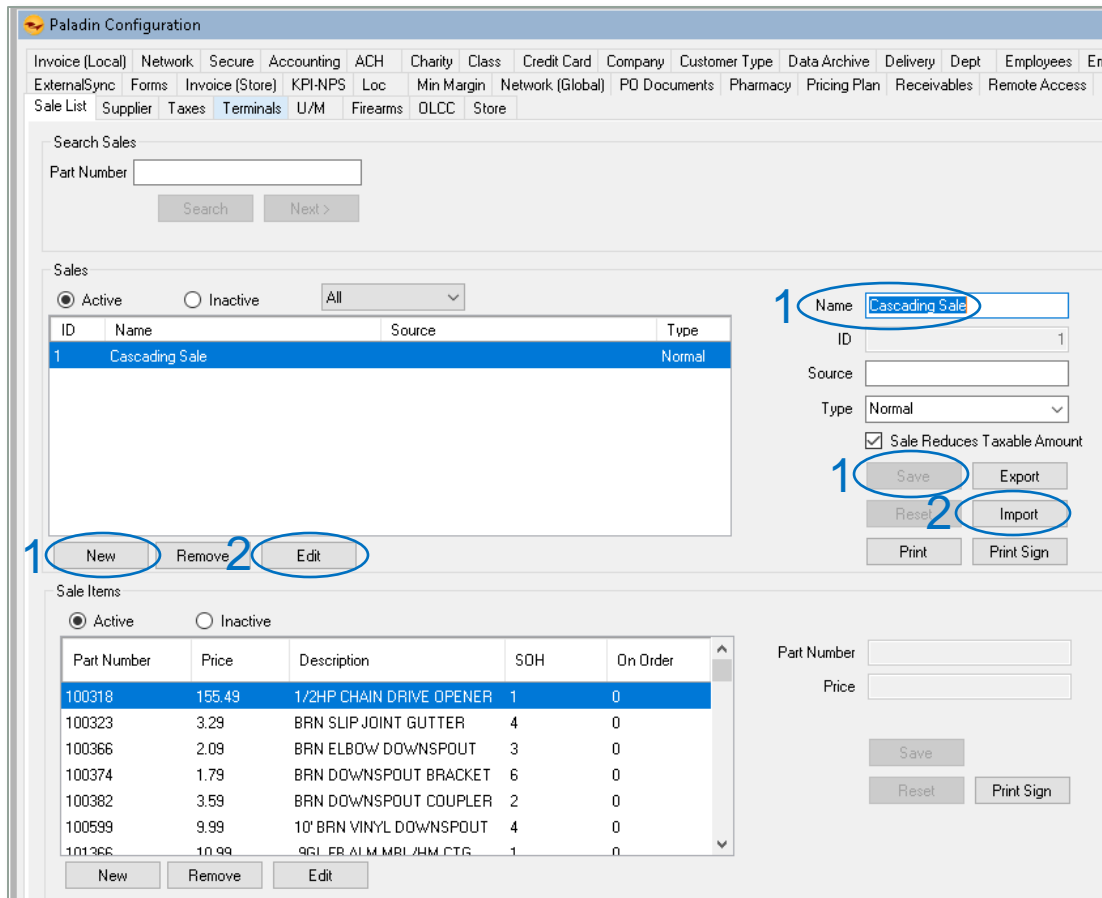
Name Cascading Sale  
ID 1  
Source  
Type Normal  
 Sale Reduces Taxable Amount

Part Number   
Price

On the **File** menu in Paladin, click **Setup**.

1. In the **Paladin Configuration** window, click the **Sale List** tab.
2. In the **Sales** section, click **New**.
3. In the **Name** box, enter a name for the sale.
4. In the **ID** box, enter a unique ID number and click **Save**.
5. Next, add sale items, click **New** under the **Sale Items** pane below and enter Part Number and Sale Price, clicking **Save** between each item entered.

# How to quickly and easily import sale items into a sale list



The screenshot shows the 'Paladin Configuration' window with the 'Sales' section active. The 'Sales' table has one entry: ID 1, Name 'Cascading Sale', Source, and Type 'Normal'. The 'Sale Items' table below lists various parts with their prices and descriptions. Red circles and numbers highlight the 'New' button (1), the 'Name' field (1), the 'Save' button (1), and the 'Edit' button (2).

ID	Name	Source	Type
1	Cascading Sale		Normal

Part Number	Price	Description	SDH	On Order
100318	155.49	1/2HP CHAIN DRIVE OPENER	1	0
100323	3.29	BRN SLIP JOINT GUTTER	4	0
100366	2.09	BRN ELBOW DOWNSPOUT	3	0
100374	1.79	BRN DOWNSPOUT BRACKET	6	0
100382	3.59	BRN DOWNSPOUT COUPLER	2	0
100599	9.99	10' BRN VINYL DOWNSPOUT	4	0
101366	10.99	9GLER ALUM MRL/HM CTG	1	0

- To create a sale import list, use Excel or Notepad.
  - Create two columns with a header for each column like; “PartNumber” and “SalePrice” and enter each product part number and sale price.
  - Save as a text file (.txt)
- Recall a Sale list or in the **Sale List** box, click on **New**, enter sale Name and ID, then click **Save**.
  - Select the Sale and click **Edit**, then click **Import**, and choose the file containing the sale items.

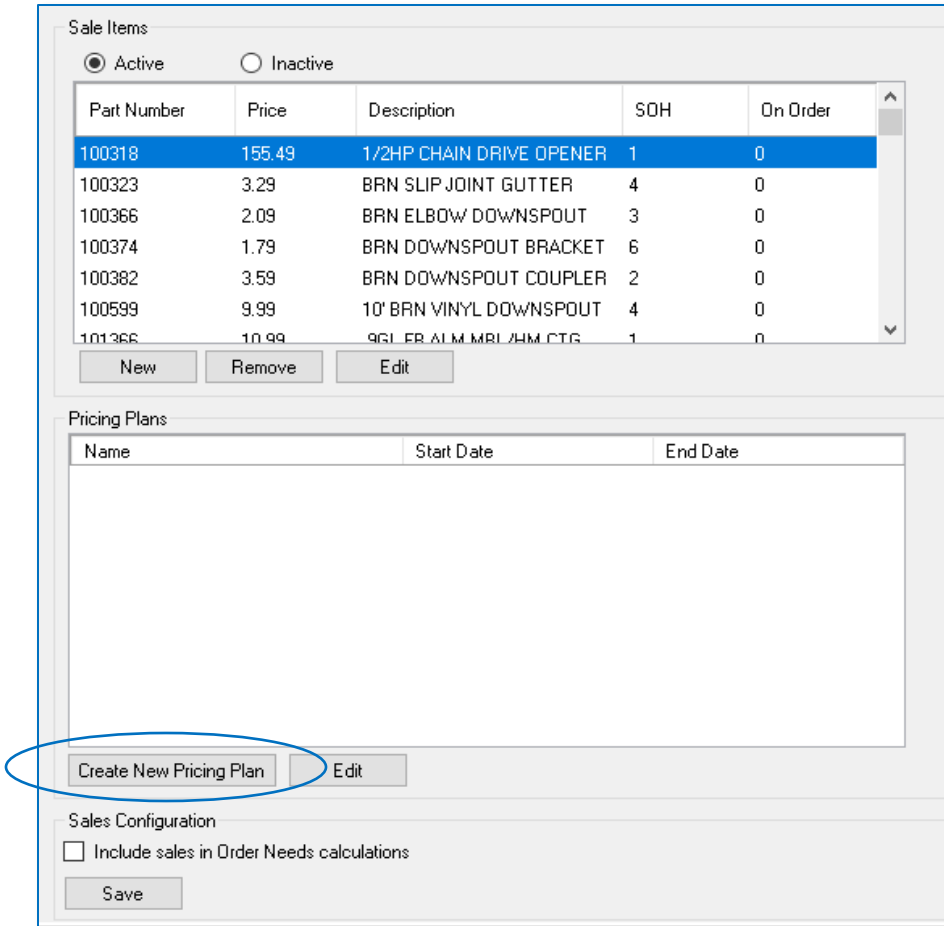
*This is a fast and easy method for creating a sale list. You may use the RF Gun to add items to your import file; see KBA ID: 21045: [How to use the RF unit to import a sale list and activate a sale](#)*

The Sale List alone does not initiate the sale.  
The sale list must be activated using a Pricing Plan.

Sale List + Pricing Plan = Discount

# How to setup and activate sales in Paladin

## How to create a pricing plan from the sale list setup window



Sale Items

Active  Inactive

Part Number	Price	Description	SOH	On Order
100318	155.49	1/2HP CHAIN DRIVE OPENER	1	0
100323	3.29	BRN SLIP JOINT GUTTER	4	0
100366	2.09	BRN ELBOW DOWNSPOUT	3	0
100374	1.79	BRN DOWNSPOUT BRACKET	6	0
100382	3.59	BRN DOWNSPOUT COUPLER	2	0
100599	9.99	10' BRN VINYL DOWNSPOUT	4	0
101366	10.99	9GL ER ALM MBL /HM CTG	1	0

New Remove Edit

Pricing Plans

Name	Start Date	End Date
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Create New Pricing Plan Edit

Sales Configuration

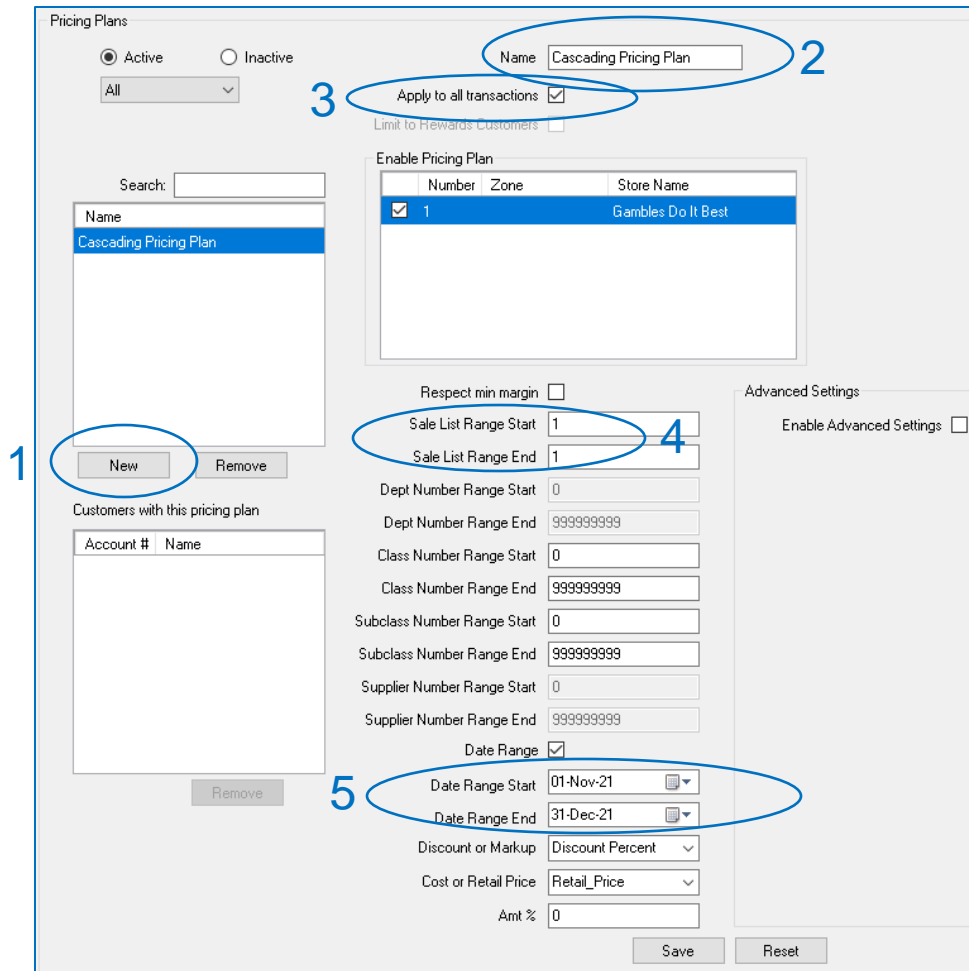
Include sales in Order Needs calculations

Save

1. To create a pricing plan and activate the sale, from within the **Sale List** window, scroll to the **Pricing Plans** pane at the bottom and click **Create New Pricing Plan**.
2. You will be taken to the **Pricing Plan** tab.
3. Otherwise, from the **Paladin Configuration** (File->Setup) window, click the **Pricing Plan** tab; see next slide.

# How to setup and activate sales in Paladin

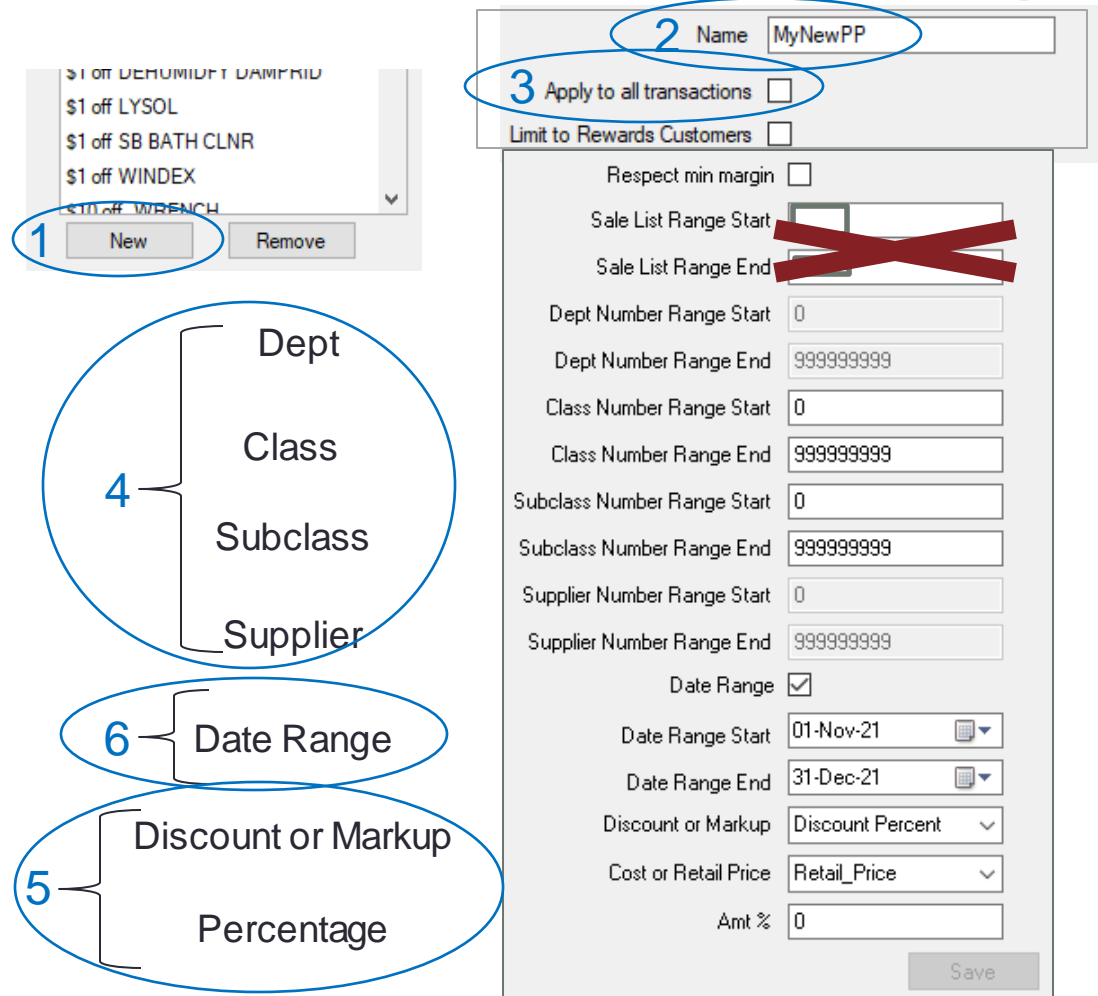
## How to create a pricing plan



1. Under **File->Setup**, select **Pricing Plans** tab and click **New**.
2. In the **Name** box, enter a name for the pricing plan (maximum of 30 characters).
3. For general sales check the box to “**Apply to all transactions**”. For private trade discounts, keep the box unchecked.
4. When pressing the **Create** new pricing plan from the **Sale List**, the Sale List Range Starting and Ending ID will be added automatically. Otherwise enter a Sale List starting and ending **ID**, matching the desired Sale List ID.
5. Optionally, you can set a date range.

## How to setup and activate sales in Paladin

### How to create a blanket pricing plan not associated with a sale list



The screenshot shows the 'New' pricing plan form. Annotations include:

- 1**: 'New' button in the top left.
- 2**: 'Name' field containing 'MyNewPP'.
- 3**: 'Apply to all transactions' checkbox, which is checked.
- 4**: A bracket grouping 'Dept', 'Class', 'Subclass', and 'Supplier' fields.
- 5**: A bracket grouping 'Discount or Markup' and 'Percentage' fields.
- 6**: 'Date Range' checkbox, which is checked.

The 'Sale List Range Start' and 'Sale List Range End' fields are crossed out with a red X. The 'Save' button is at the bottom right.

1. In the **Pricing Plans** section, click **New**.
2. In the **Name** box, enter a name for the pricing plan.
3. For general sales check the box to “**Apply to all transactions.**” For private trade discounts to be assigned to selected customers, keep the box unchecked.
4. Ignore Sale list range and choose either Department, Class, Subclass, or Supplier, ID range.
5. Set your desired Discount or Markup, Cost or Retail Price, then choose the percentage amount.
6. Optionally, you can set a beginning and ending date.

## How to setup and activate sales in Paladin

### Choices for setting up a pricing plan without a sale list

Department	In the <b>Dept Number Range Start</b> and <b>End</b> boxes, enter the supplier number ID range.
Class	In the <b>Class Number Range Start</b> and <b>End</b> boxes, enter the class number ID range.
Subclass	In the <b>Subclass Number Range Start</b> and <b>End</b> boxes, enter the subclass number ID range.
Supplier	In the <b>Supplier Number Range Start</b> and <b>End</b> boxes, enter the supplier number ID range.
Date	In the <b>Date Range Start</b> and <b>End</b> fields, check the <b>Date Range</b> box and select the beginning and ending dates.
Discount or Markup Cost or Price	In the <b>Discount or Markup</b> list, select one. In the <b>Cost</b> or <b>Retail Price</b> list, select the type of cost or retail price.
Percentage	In the <b>Amt%</b> box, enter the desired percentage amount.

## BOGO – Buy one, Get One Sales

**BOGO**

**BUY ONE, GET ONE**

**1/2 OFF**

### **BOGO's are an effective marketing tool**

- It drives traffic to your store and provides upsell opportunities.
- Offering your customers BOGO's will improve your profit margins by increasing the quantity sold and average ticket amount.
- A BOGO of 50% offers you the ability to sell more products, which increases your GMROI by increasing your turns and increasing your customers' average ticket price.



## How to set up a BOGO in Paladin – Pricing Plan (Step 1)

### Sale List

Name	My_New_BOGO
ID	1123
Source	
Type	Normal
	Normal
	Ace Instant Savings
	<b>Advanced Sale</b>
	Special Promo

### Pricing Plan

Sale Type:  
There are 3 valid Sale Types: 'Buy One Get One',  
'Mix And Match', and 'Buy One Get Another'.  
Select a Sale Type to see a description of each  
Sale Type.

Advanced Settings

Enable Advanced Settings

Sale Type

Buy One Get One
Mix And Match
Buy One Get Another
None

- Create a **Sale List** of the BOGO sale item(s) and set them with a **price of zero**.
- Change the sale Type from Normal to **Advanced Sale**.
- Create a Pricing Plan and check the box **Enable Advanced Settings**
- This opens the BOGO wizard.

## How to set up a BOGO in Paladin – Pricing Plan (Step 2)

Select **Sale Type: Buy One Get One**


Sale Type:  
There are 3 valid Sale Types: 'Buy One Get One',  
'Mix And Match', and 'Buy One Get Another'.  
Select a Sale Type to see a description of each  
Sale Type.

Advanced Settings

Enable Advanced Settings

Sale Type

- Buy One Get One
- Mix And Match
- Buy One Get Another
- None



## How to set up a BOGO in Paladin – Pricing Plan (Step 3)

Sale Type:  
There are 3 valid Sale Types: 'Buy One Get One',  
'Mix And Match', and 'Buy One Get Another'.  
Select a Sale Type to see a description of each  
Sale Type.

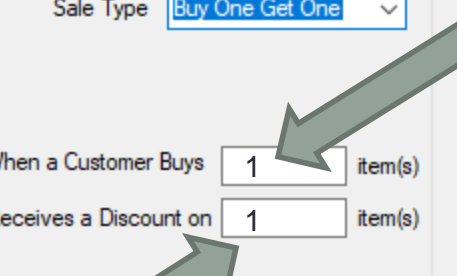
Advanced Settings

Enable Advanced Settings

Sale Type

When a Customer Buys  item(s)

The Customer Receives a Discount on  item(s)



Enter 1 for buy one item

Enter 1 for receive a discount on the next item

## How to set up a BOGO in Paladin – Pricing Plan (Step 4)

Discount Type:  
There are 3 valid Discount Types: 'Percent Off', 'Free', and 'Dollar Off Item'. Select a Discount Type to see a description of each Discount Type.

Advanced Settings

Enable Advanced Settings

Sale Type

When a Customer Buys  item(s)

The Customer Receives a Discount on  item(s)

Discount Type

- None
- Percent Off
- Fixed
- Free
- Dollar Off Invoice
- Dollar Off Item

Select **Discount Type: Free**

## How to set up a BOGO in Paladin – Pricing Plan (Step 5)

Limit Type:  
There are 4 valid Limit Types: 'None', 'Min Qty of Items Purchased', 'Max Qty of Items Discounted', and 'Max Discount Amount'. Select a Limit Type to see a description of each Limit Type.

Advanced Settings

Enable Advanced Settings

Sale Type

When a Customer Buys  item(s)

The Customer Receives a Discount on  item(s)

Discount Type

Sale Limitations

- Minimum Invoice Price
- Max Discount Amount
- Max Qty of Items Discounted
- Min Qty of Items Purchased
- Exact Qty of Items Purchased
- None

Description (Optional)

Select Max Qty of Items Discounted

## How to set up a BOGO in Paladin – Pricing Plan (Step 6)

Limit Quantity:  
This field is for the minimum or maximum quantity limitations described by the 'Limit Type'. It must be a number (can contain decimals) between 0 and 1000000.

Advanced Settings

Enable Advanced Settings

Sale Type Buy One Get One  item(s)

When a Customer Buys 1

The Customer Receives a Discount on 1 item(s)


When a Customer Buys 2 item(s)

The Customer Receives a Discount on 1 item(s)

Discount Type Free

Sale Limitations Max Qty of Items Discounted

Limit Quantity



### Limit Quantity: 2

This enables you to limit the number of free or discounted items that you wish to allow. We are using 2 for this example.

## How to set up a BOGO in Paladin – Pricing Plan (Step 7)

Limit Type:  
There are 4 valid Limit Types: 'None', 'Min Qty of Items Purchased', 'Max Qty of Items Discounted', and 'Max Discount Amount'. Select a Limit Type to see a description of each Limit Type.

Advanced Settings

Enable Advanced Settings

Sale Type

When a Customer Buys  item(s)


The Customer Receives a Discount on  item(s)

Discount Type

Sale Limitations

- Minimum Invoice Price
- Max Discount Amount
- Max Qty of Items Discounted
- Min Qty of Items Purchased
- Exact Qty of Items Purchased
- None

Description (Optional)



Enter a desired **Description** here:  
Example: BUY 1 GET 1 FREE

This description will display under the item on the invoice.

# Example BOGO item description on invoice

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Hometown Hardware 9 Paladin Support 01 NOV 2019 01 01-Nov-19

Invoice / Quote Checkout Cancel

Rewards  Customer  Address 2  Phone

Credit  Address 1  City/State/Zip  Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31899	BULB RGH SER 500W 118MM	2	\$ 5.99	\$ 11.98
			1				
			31899	5.99			
				BUY 1 GET 1 FREE	-1	5.99	-5.99
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

F1 Advanced Lookup F2 Add Note F3 Delete Line Item F4 Discount Item F5 Account Payment F6 Store Transaction F7 Stock Check F8 Checkout



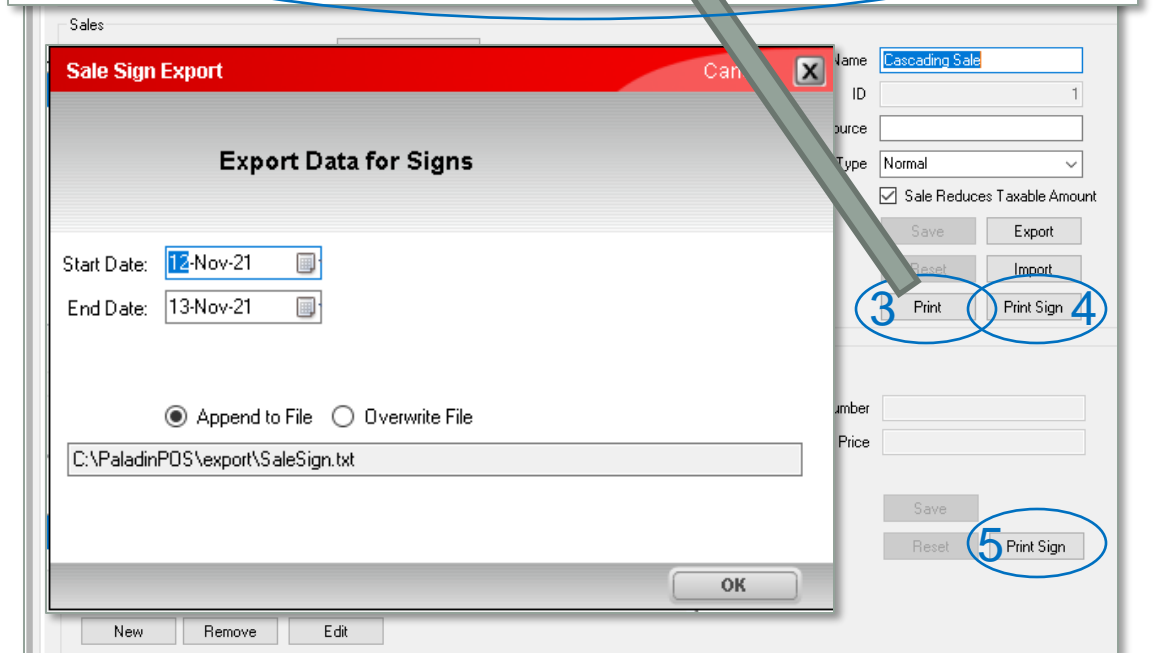


Bonus Material  
Printing Sale Signs

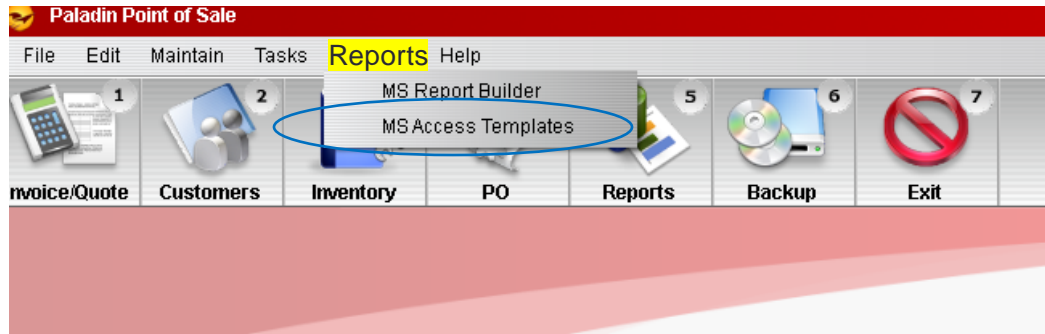


## How to print a sales report and export data for signs

Line Num	Part Number	Description	SOH	Retail Price	Sale Price
1	100318	1/2HP CHAIN DRIVE OPENER	1.00	\$179.99	\$155.49
2	100323	BRN SLIP JOINT GUTTER	4.00	\$6.49	\$3.29
3	100366	BRN ELBOW DOWNSPOUT	3.00	\$4.29	\$2.09
4	100374	BRN DOWNSPOUT BRACKET	5.00	\$3.49	\$1.79

1. On the **File** menu, click **Setup**.
2. In **Paladin Configuration**, click the **Sale List** tab, then select a print option:
3. To print a report listing all sale items: Click **Print** in the **Sales** pane.
4. For a sale sign for a selected sale including all items, in the **Sales** pane click **Print Sign**.
5. To print a sale sign for the selected item: In the **Sale Items** pane, click **Print Sign**.
6. Enter date range of the sale.
7. Click **OK** – A file is created.



## How to print sale signs

1. Click **Reports** on the menu bar in Paladin.
2. Select **MS Access Templates**.
3. Select **Sales Signs**.
4. Select desired sale sign size and type.  
**Note:** See the LTSR Catalog in Paladin knowledgebase to view all sign types.
5. Click **Print**
6. Click **Close**

Next webinar:

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June 28 at 9am PT

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Check out our [Spring 2019 Release Guide](#)  
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