UNIVERSITY

Automating Sales, Promotions and Trade Discounts

Charles Owen
Chief Experience Officer
June 7, 2022

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

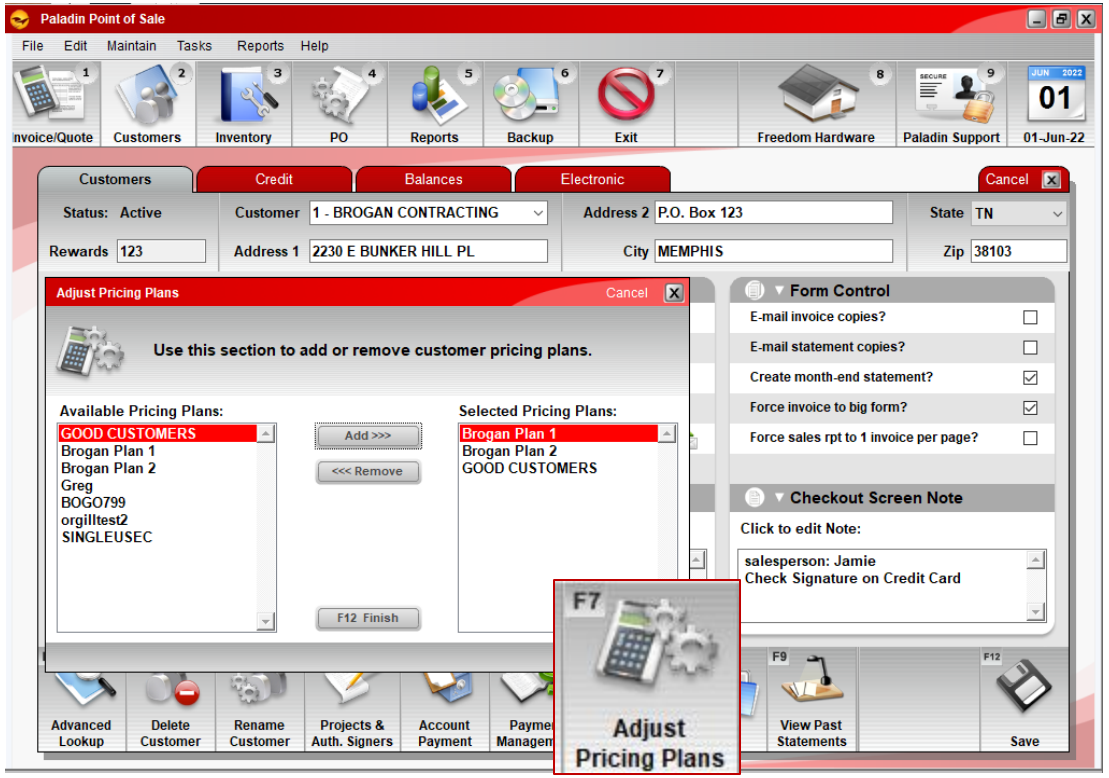
Discount Types

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

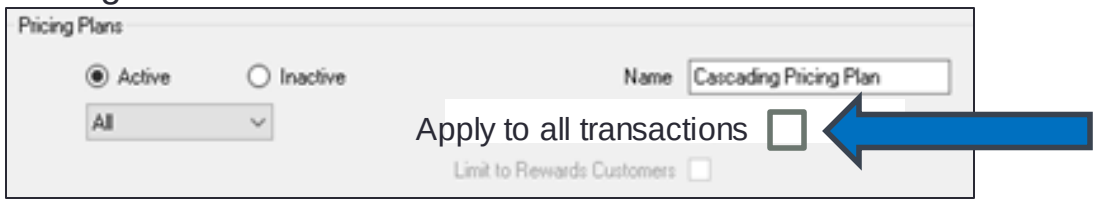
Cascading sales

- 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

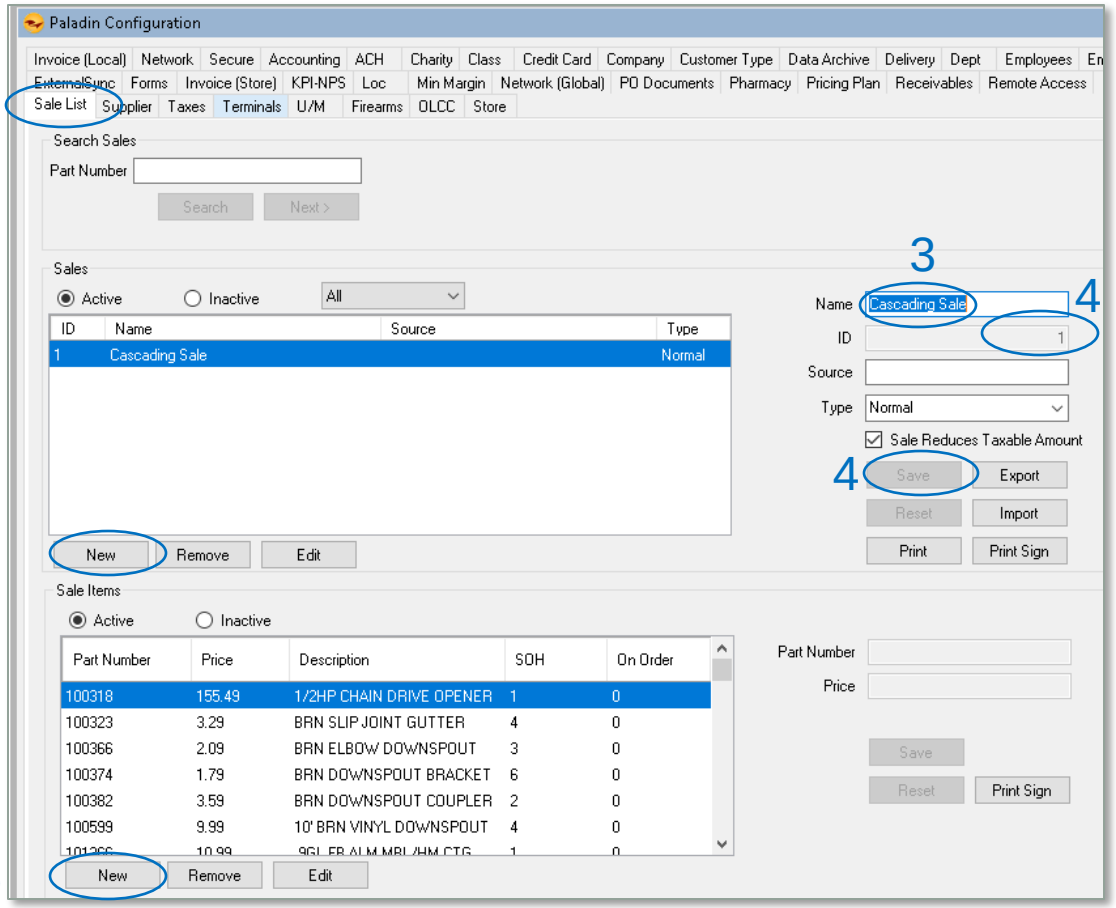
~ or ~

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

UNIVERSITY

How to setup and activate sales in Paladin
How to create a sale list

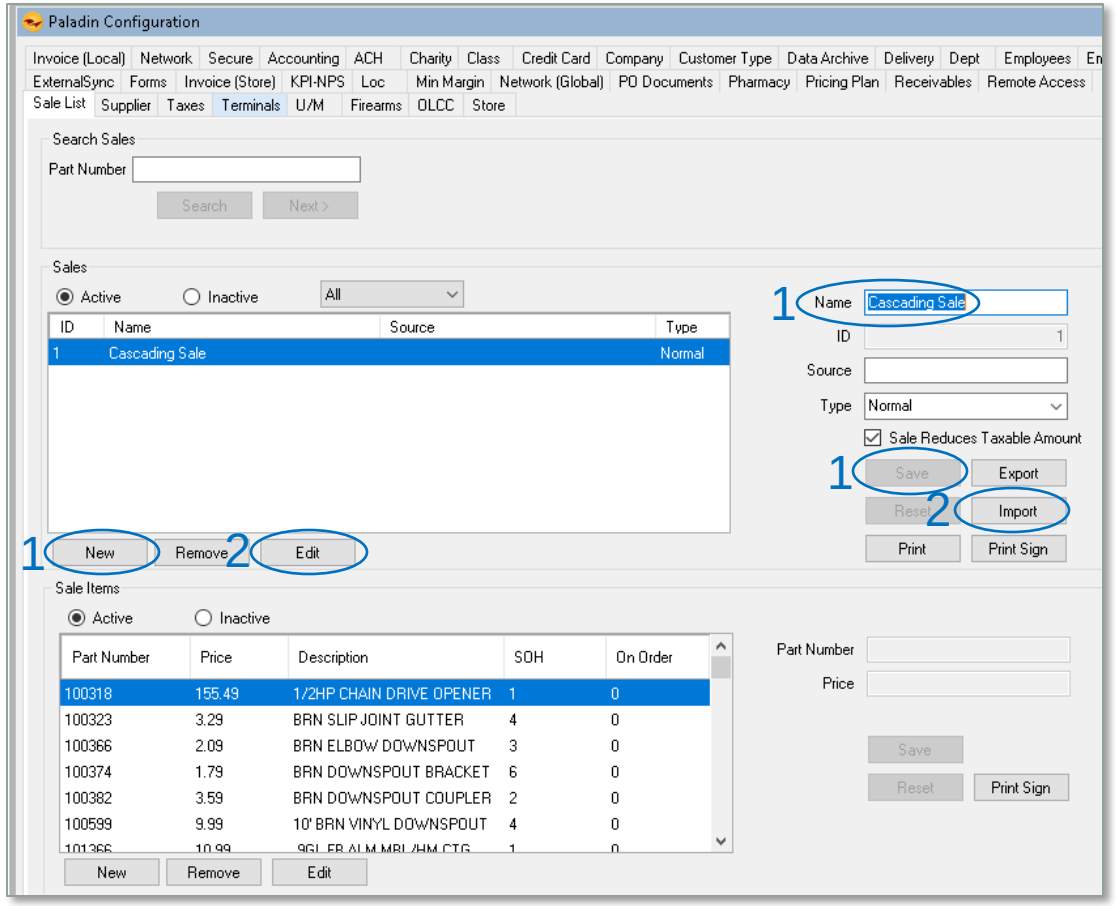


On the **File** menu in Paladin, click **Setup**.

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.

UNIVERSITY

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



- 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)

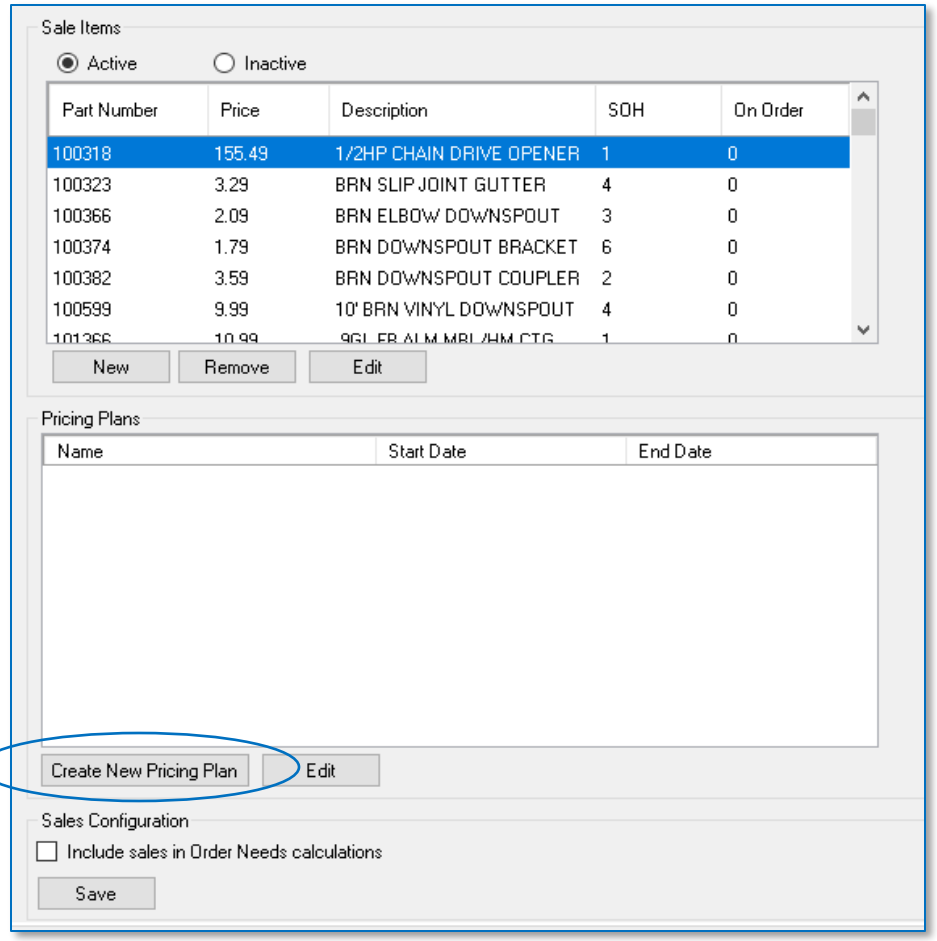
1. Recall a Sale list or in the **Sale List** box, click on **New**, enter sale Name and ID, then click **Save**.
2. Select the Sale and click **Edit,** then click **Import,** and choose the file containing the sale items.

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

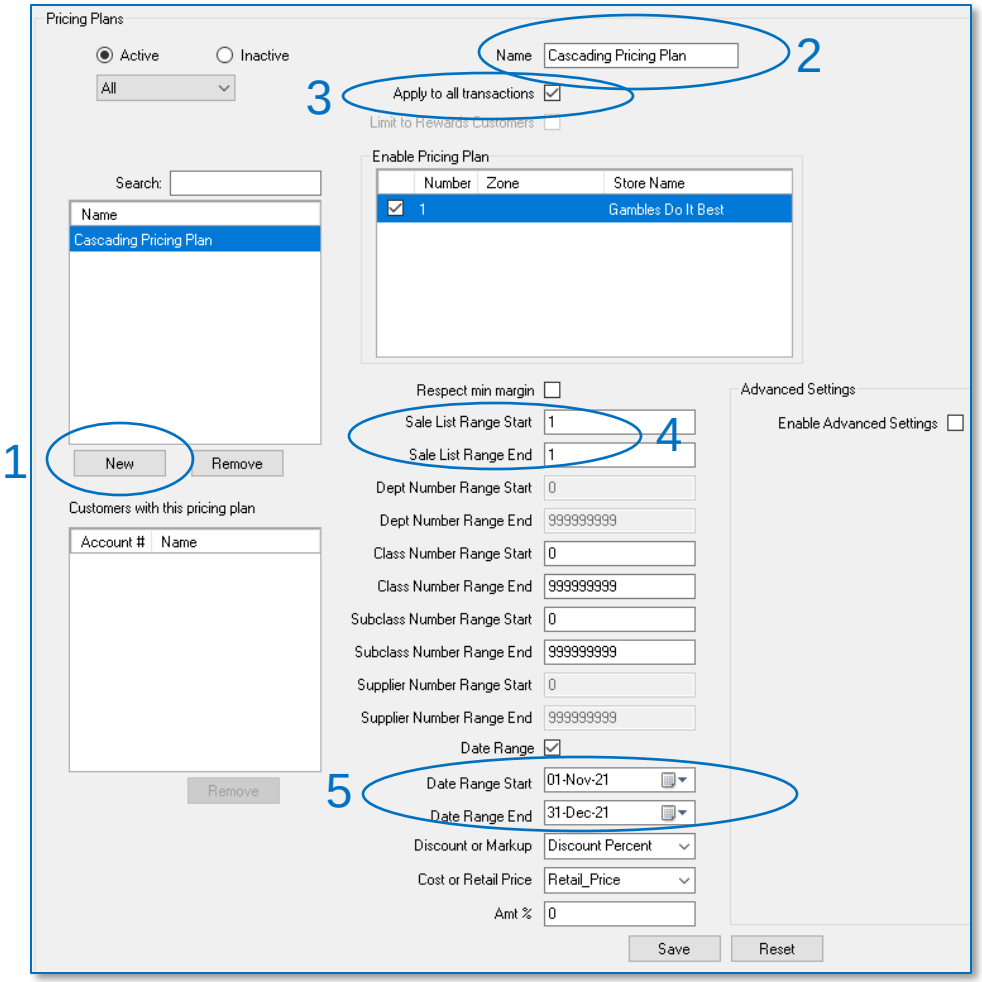


1. To create a pricing plan and activate the sale, from within the **Sale List** window, scroll to the **Pricing Plans** pane at the bottom and click **Create New Pricing Plan**.

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.

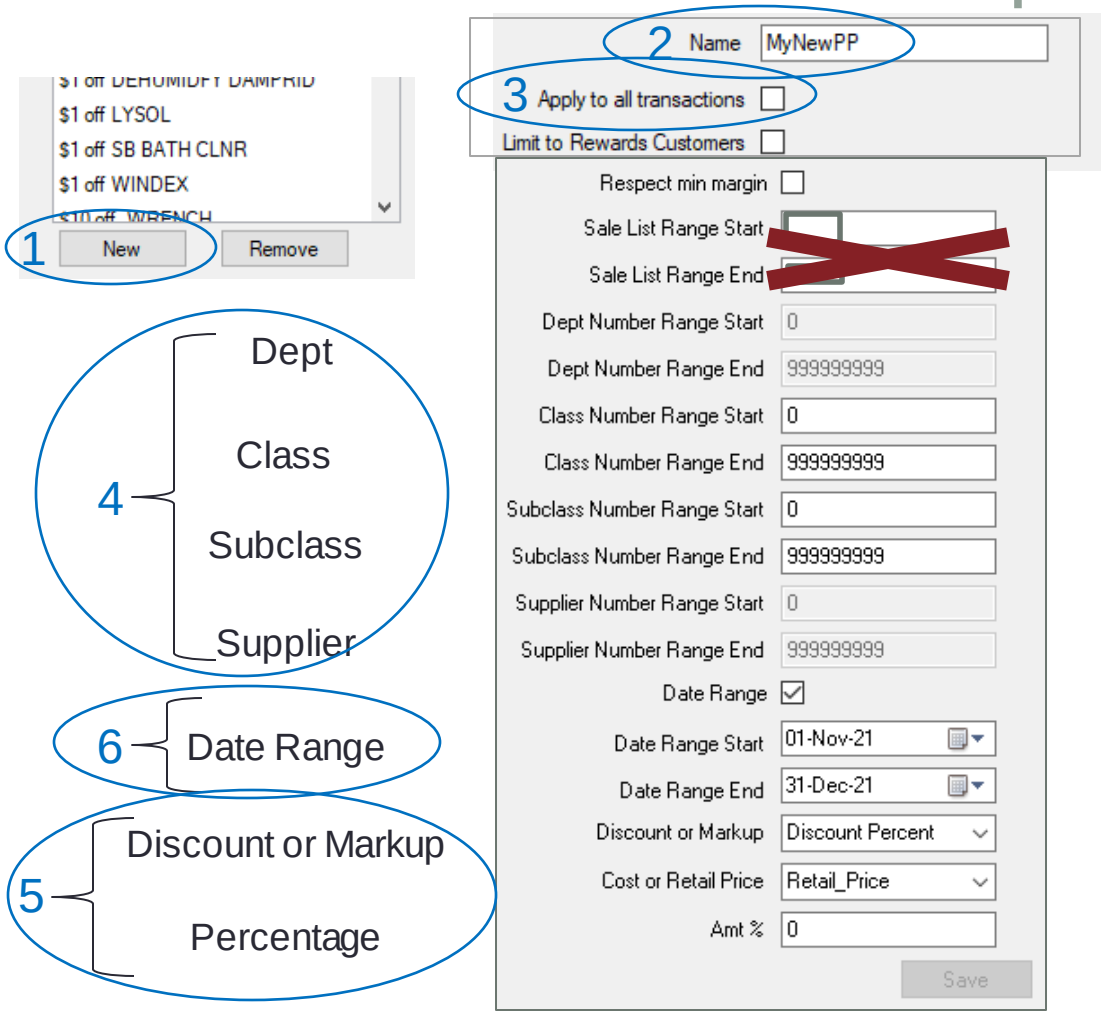
How to setup and activate sales in Paladin
How to create a pricing plan



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



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

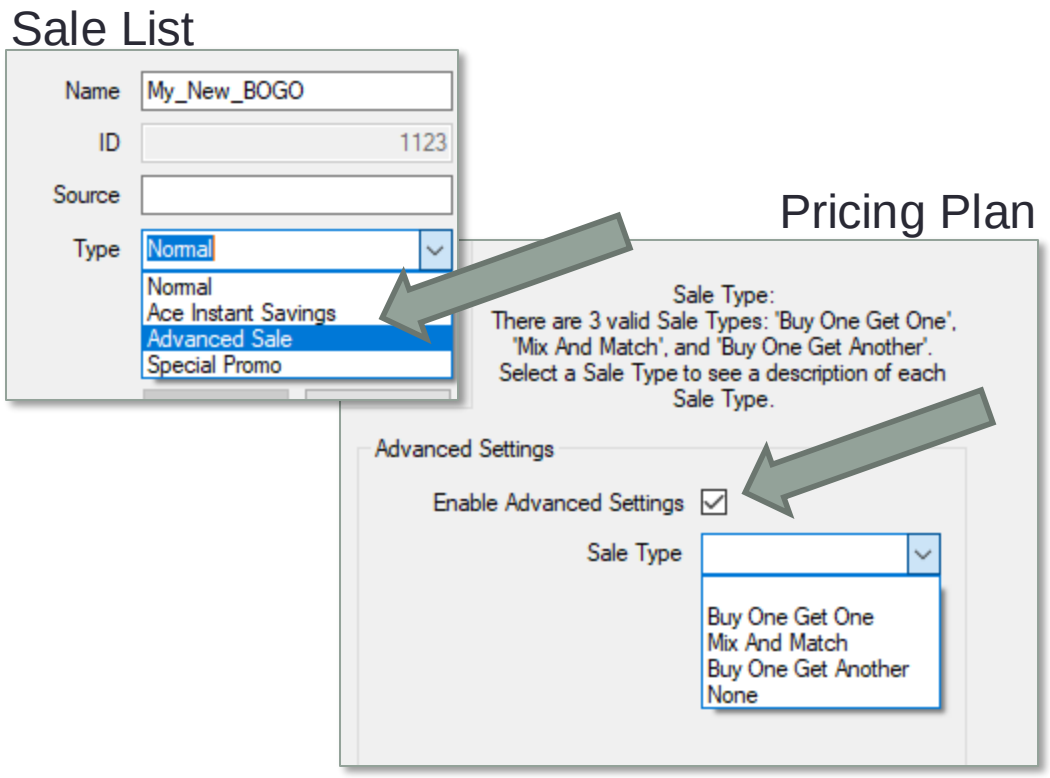
Department	In the **Dept Number Range Start** and **End** boxes, enter the supplier number ID range.
Class	In the **Class Number Range Start** and **End** boxes, enter the class number ID range.
Subclass	In the **Subclass Number Range Start** and **End** boxes, enter the subclass number ID range.
Supplier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

BOGO – Buy one, Get One Sales

BOGO's are an effective marketing tool

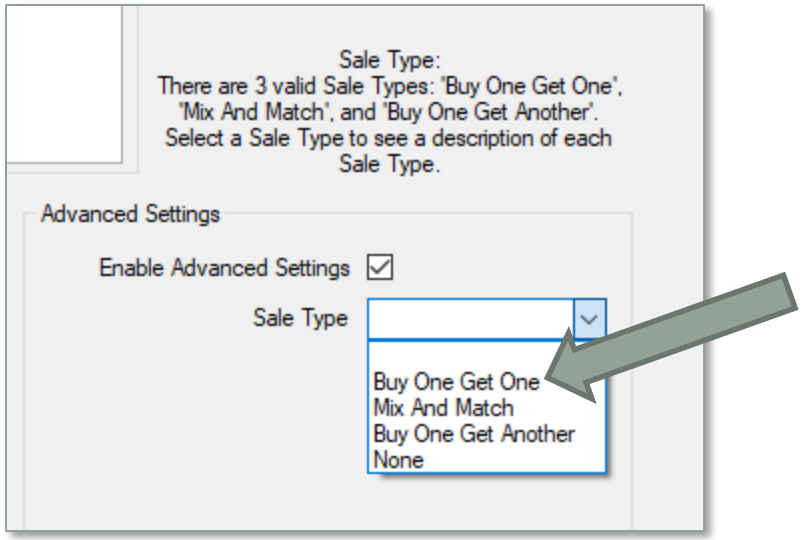
- It drives traffic to your store and provides upsell opportunities.
- Offering your customers BOGO's will improve your profit margins by increasing the quantity sold and average ticket amount.
- A BOGO of 50% offers you the ability to sell more products, which increases your GMROI by increasing your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

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



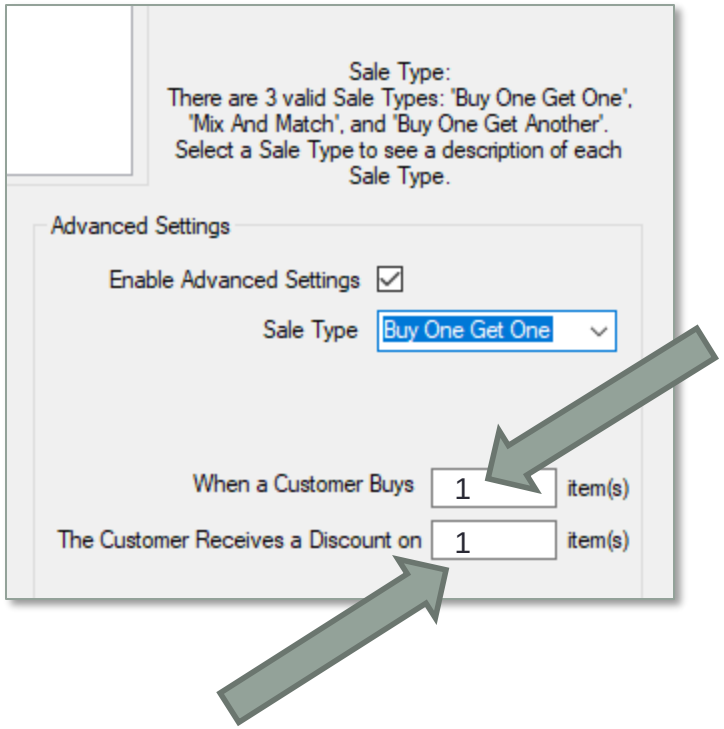
- Create a **Sale List** of the BOGO sale item(s) and set them with a **price** of **zero**.
- Change the sale Type from Normal to **Advanced** Sale.
- Create a Pricing Plan and check the box **Enable Advanced Settings**
- This opens the BOGO wizard.

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



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

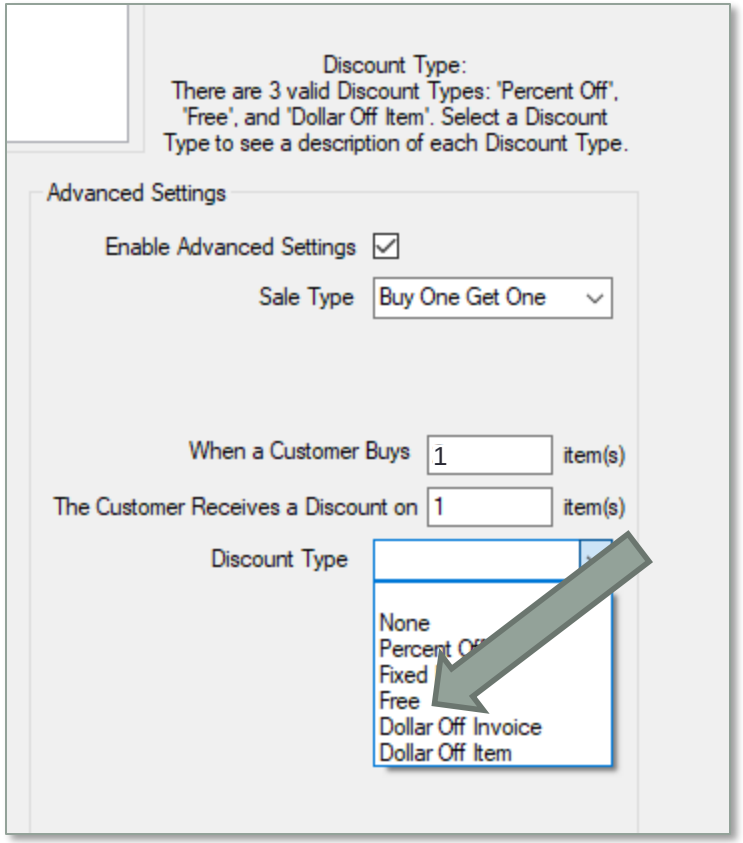
How to set up a BOGO in Paladin – Pricing Plan (Step 3)



Enter 1 for buy one item

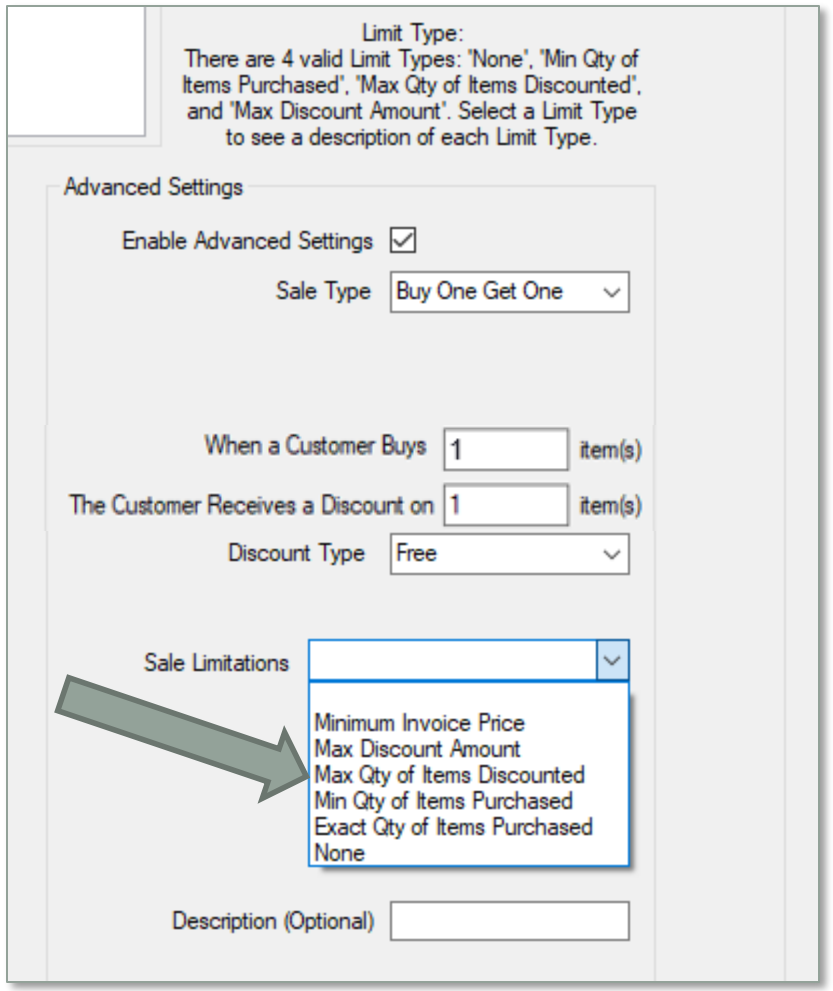
Enter 1 for receive a discount on the next item

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



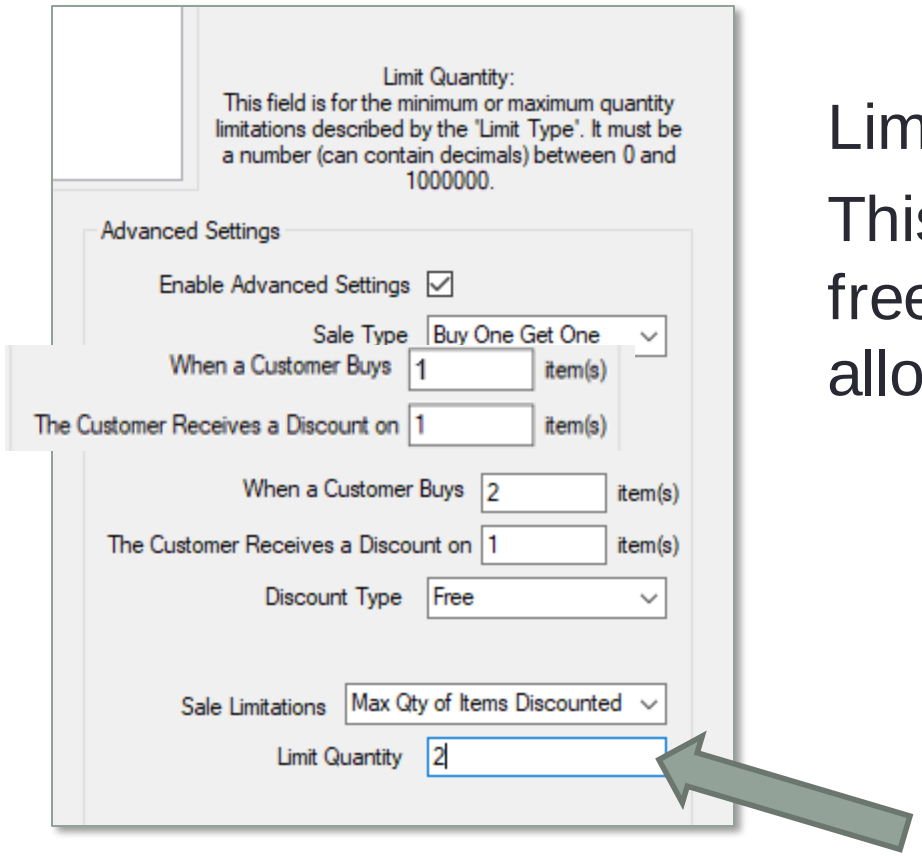
Select **Discount Type**: **Free**

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



Select **Max Qty of Items Discounted**

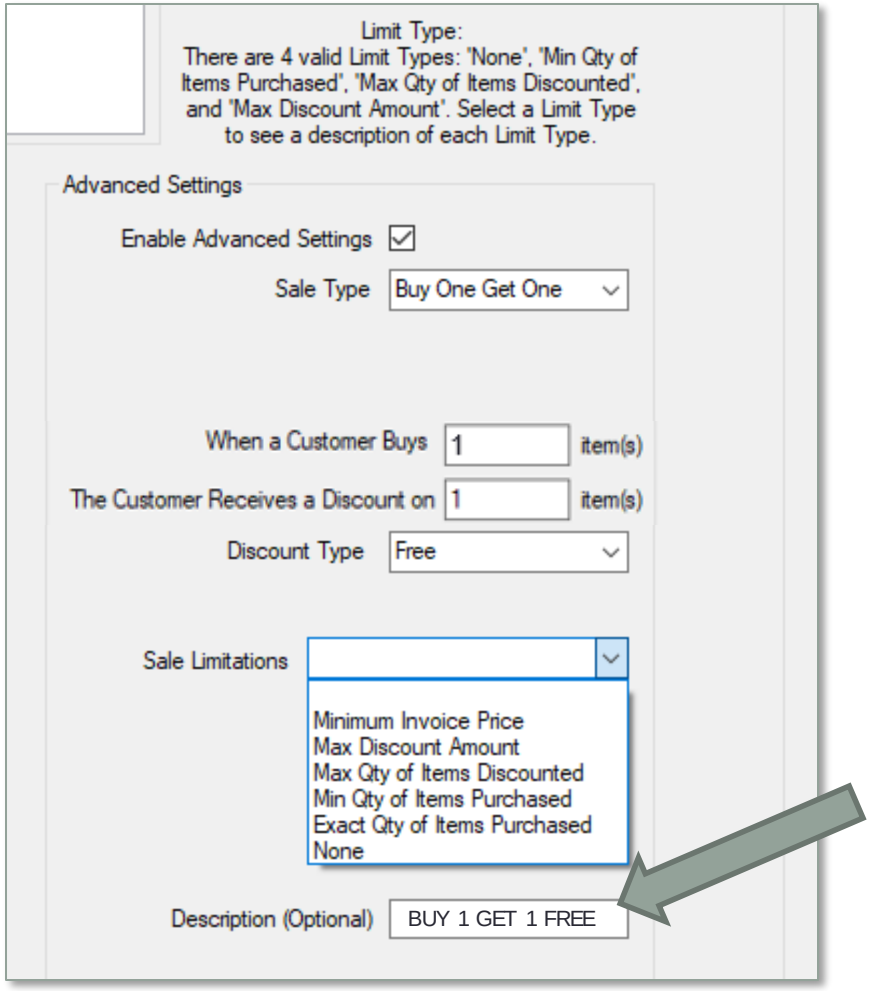
How to set up a BOGO in Paladin – Pricing Plan (Step 6)



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)

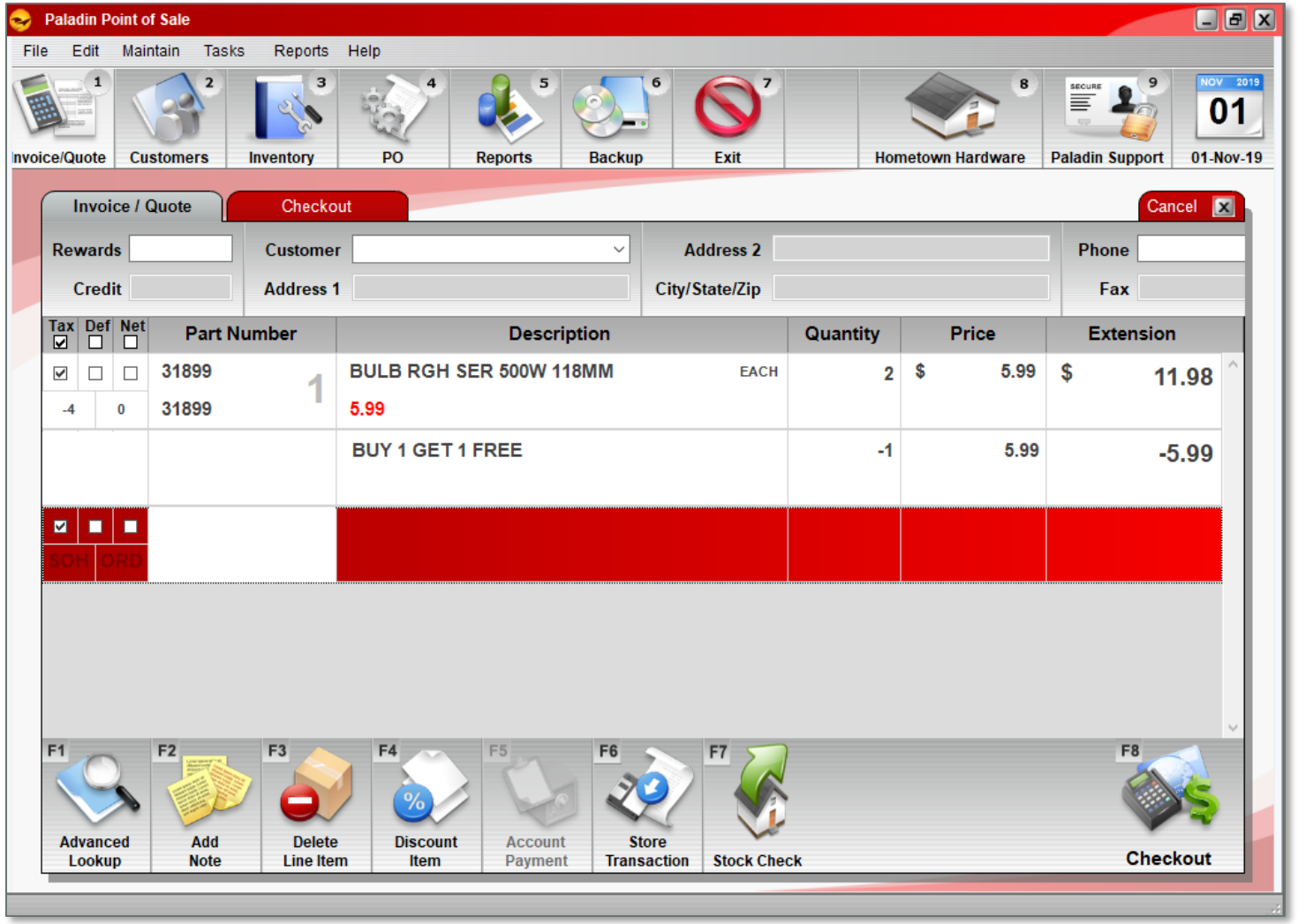


Enter a desired **Description** here:

Example: BUY 1 GET 1 FREE

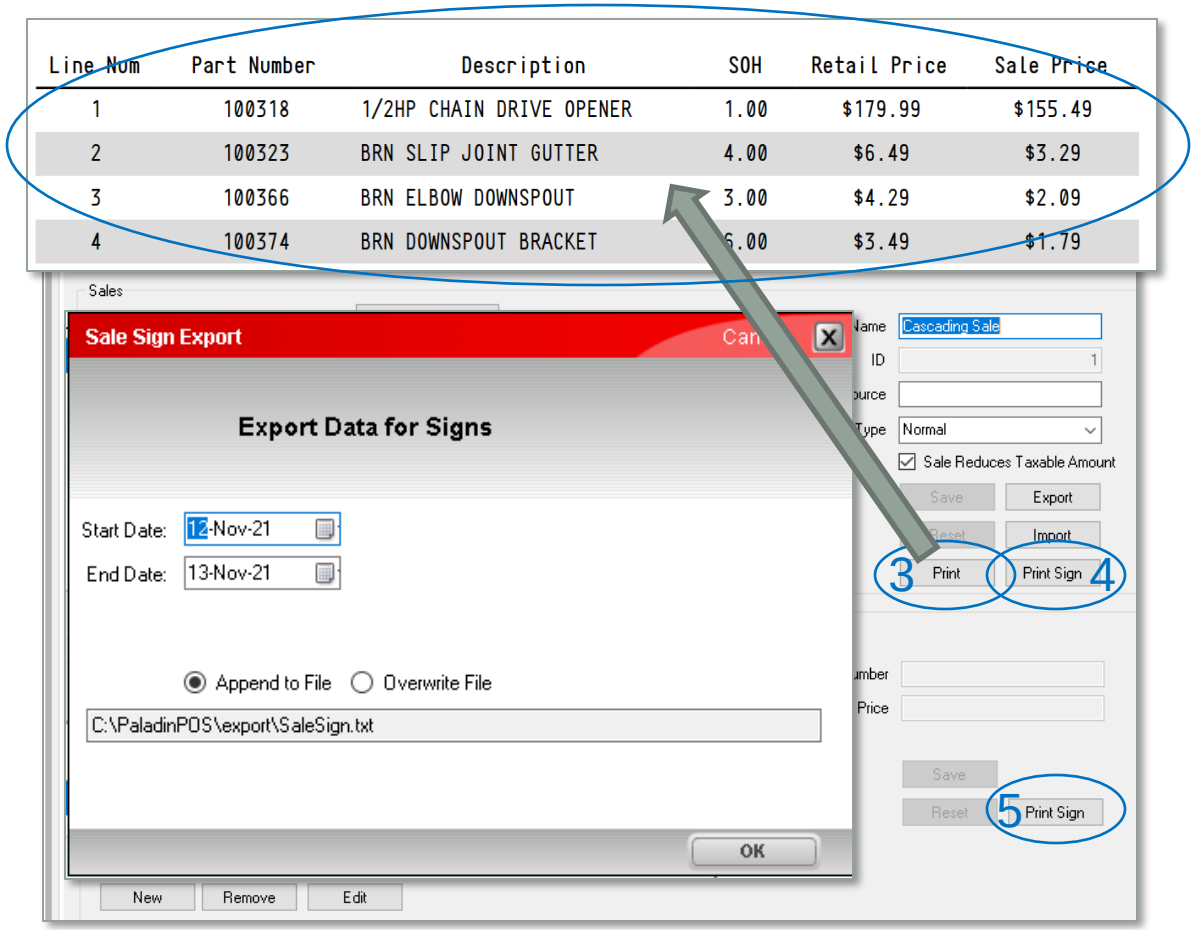
This description will display under the item on the invoice.

Example BOGO item description on invoice

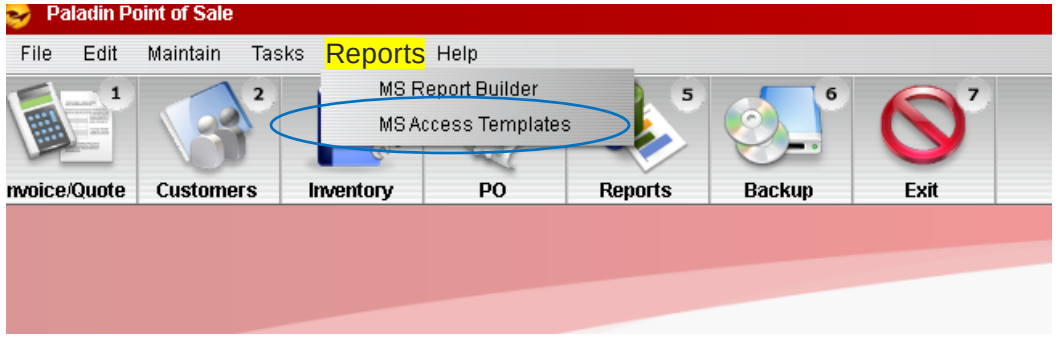


Bonus Material
Printing Sale Signs

How to print a sales report and export data for signs



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:

Paladin Makes Processing Statements Easy

June 28 at 9am PT

Register: portal.paladinpos.com/webinars

UNIVERSITY

Check out our **Spring 2019 Release Guide** on the Help Portal.

Expand your Paladin Knowledge:

Stay relevant in retail:
paladinpointofsale.com/retailscience

Webinars available at:
portal.paladinpos.com/webinars

Self help at:
portal.paladinpos.com

Follow us for Paladin news and updates: