



Paladin Pointers: Invoice (Store) Setup Tab Overview

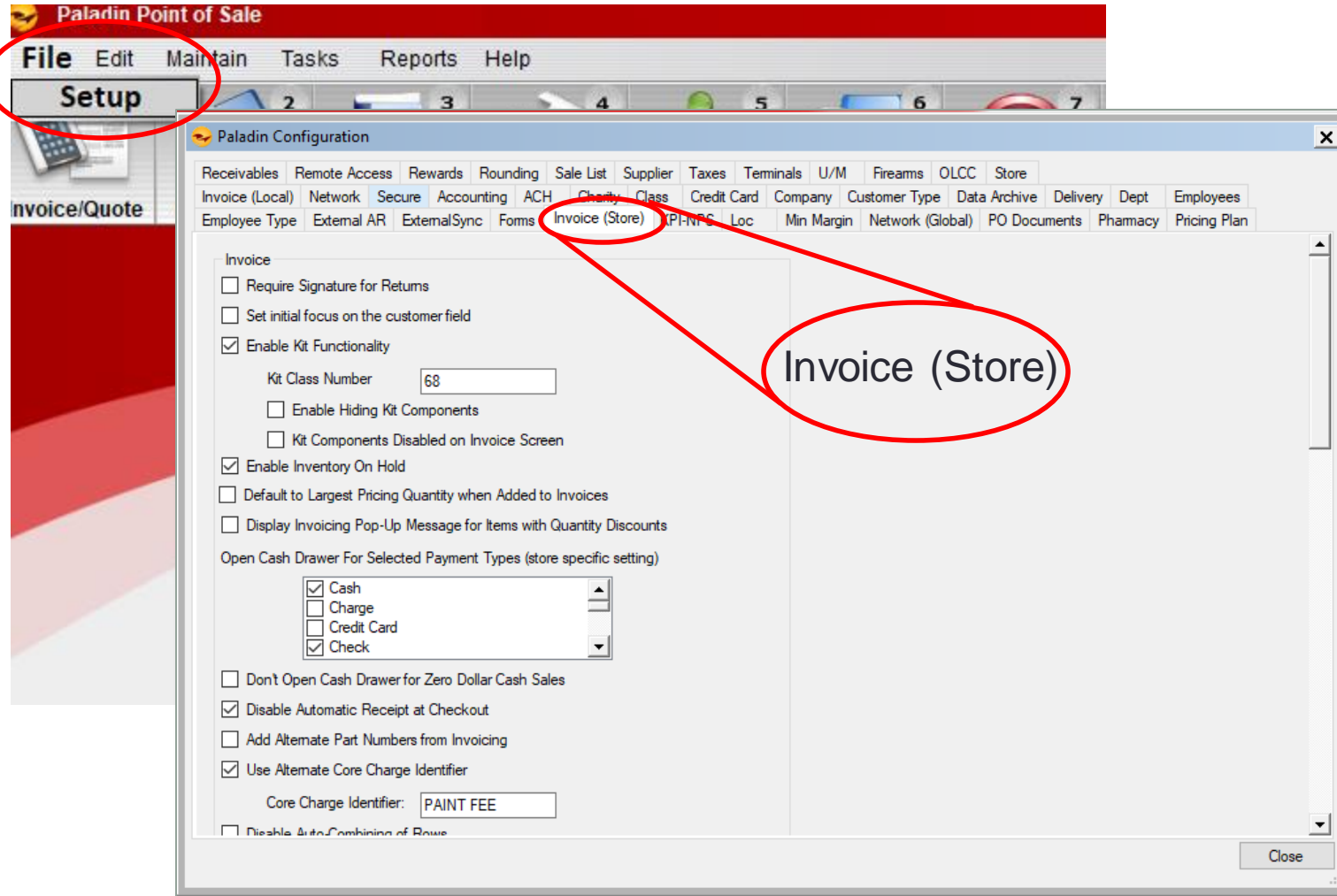
Charles Owen
Chief Experience Officer
March 15, 2022

WHAT YOU'LL LEARN

Highlights of Invoice (Store) Setup Tab:

- Review the various switches, levers, knobs and settings that influence the invoicing process.
- How to effect changes in Paladin invoicing to more closely respect your store's procedures and best practices.
- How to turn on and off cashier messages and prompts for reducing potential cashier mishaps during checkout.
- Learn about newer features in Paladin that may help you with your daily routines.

How to get to the Invoice (Store) Tab



- To access the Invoice (Store) Tab, click **File**, then **Setup** and choose the **Invoice (Store)** Tab.

Breaking down the Invoice (Store) list into four sections

Section 1

Invoice

- ☐ Require Signature for Returns
- ☐ Set initial focus on the customer
- ☒ Enable Kit Functionality
- Kit Class Number
- ☐ Enable Hiding Kit Components
- ☐ Kit Components Disabled
- ☒ Enable Inventory On Hold
- ☐ Default to Largest Pricing Quantity
- ☐ Display Invoicing Pop-Up Message

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

- ☒ Cash
- ☐ Charge
- ☐ Credit Card
- ☒ Check

☐ Don't Open Cash Drawer for Zero Dollar Transactions

☒ Disable Automatic Receipt at Check

☐ Add Alternate Part Numbers from Invoice

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Address

☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders

Section 3

- ☐ Use Receipt Printer for Invoice Reprint
- ☐ Hide Item Regular Retail On Invoice
- ☒ Invoice F4/Discount Respects Min Margin
- ☒ Invoice F4/Discount Applies to Manually Priced Items
- ☒ Capture Return Item Invoice Number
- ☒ Display Description 2 in Invoice/Quote
- ☐ Block Description 2 from Invoices and Receipts
- ☐ Disable Customer Stored Transaction Count
- ☐ Do Not Accept Checks From Non-Charge Customers

Deleted Part Behavior

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

- ☐ Enable EMV Receipts
- ☒ Disable EMV Receipts for Invoice Reprint
- ☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

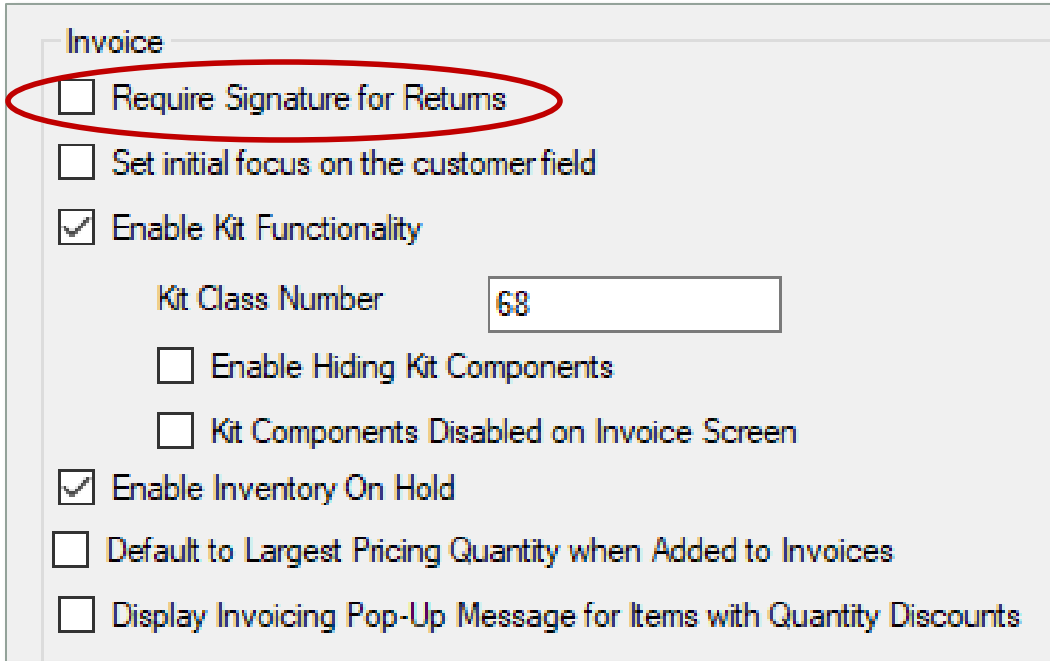
- ☐ Enable Async Loading
- ☐ Enable Quote Numbers
- ☐ Disable second receipt when signature is skipped
- ☒ Enable Tax Holiday
- ☐ Enable Oversold Warning
- ☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)

Review of Section 1.1


Section 1



Invoice

- ☐ Require Signature for Returns
- ☐ Set initial focus on the customer field
- ☒ Enable Kit Functionality
 - Kit Class Number
 - ☐ Enable Hiding Kit Components
 - ☐ Kit Components Disabled on Invoice Screen
- ☒ Enable Inventory On Hold
- ☐ Default to Largest Pricing Quantity when Added to Invoices
- ☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts

- Require Signature for Returns
 - Prompts for signature when returning items
 - Prompts for ID, Name, Phone, etc.



Additional Customer Info Required Cancel X

Returning Items Require Additional Customer Information

ID:

ID Type:

Issuing Agency:

* Name:

Phone #:

Address:

State:

Next >>

STEP 1 COMPLETE

Use 2-D scanner to scan back of driver's license for auto-filling this form.

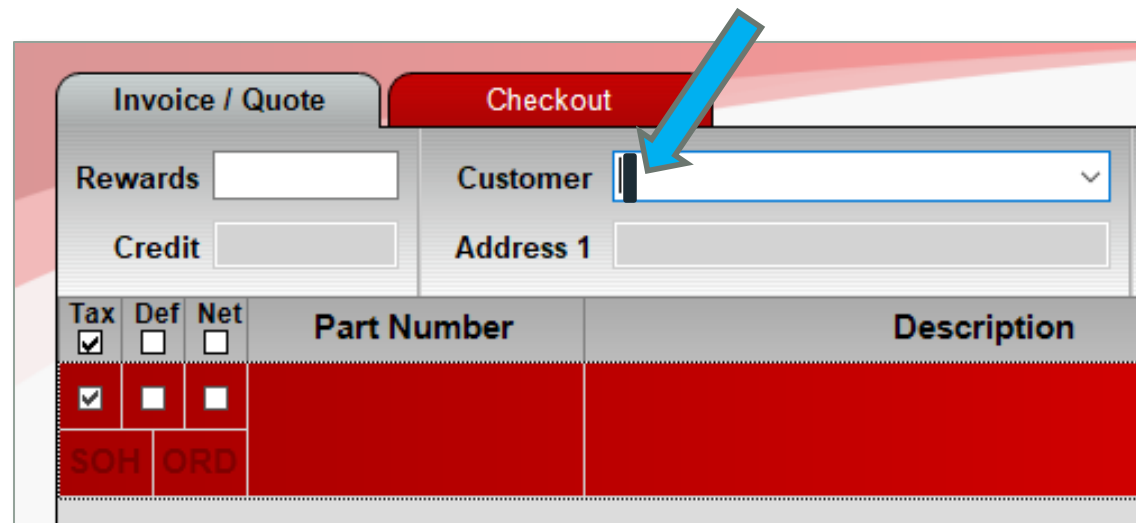
Review of Section 1.2

Section 1

Invoice

- ☐ Require Signature for Returns
- ☐ Set initial focus on the customer field
- ☒ Enable Kit Functionality
 - Kit Class Number
 - ☐ Enable Hiding Kit Components
 - ☐ Kit Components Disabled on Invoice Screen
- ☒ Enable Inventory On Hold
- ☐ Default to Largest Pricing Quantity when Added to Invoices
- ☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts

- Set initial focus on the Customer field
 - If this option is selected, when accessing the **Invoice/Quote** module the cursor will be immediately positioned on the **Customer** drop-down field, rather than the part number field.



Invoice / Quote Checkout

Rewards

Credit

Customer

Address 1

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
SOH	ORD			

Review of Section 1.3

Section 1

Invoice

☐ Require Signature for Returns

☐ Set initial focus on the customer field

☒ Enable Kit Functionality

Kit Class Number

- Enable Kit Functionality

- Check this box to use the Kit feature in Paladin.
- A kit Class ID Number must be assigned.
- This Class ID will be applied to the kit trigger.

Invoice / Quote **Checkout** 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

☐ Show for all customers

Name	Memo	Dynamic	Date	Emp #	Acct #
KIT2	POWER TOOLS AND ACCESSORIES		19-Apr-17 10:14	1	0
750161K	SPECIAL GRILL OFFER		19-Apr-17 10:06	1	0

Kit trigger items must have the kit class assigned in the inventory module under class 1,2, or 3.

Classes 1 Classes lock

Class:

Subclass:

Review of Section 1.4

Section 1

Invoice

☐ Require Signature for Returns
☐ Set initial focus on the customer field
☒ Enable Kit Functionality

Kit Class Number

☐ Enable Hiding Kit Components
☐ Kit Components Disabled on Invoice Screen

☒ Enable Inventory On Hold
☐ Default to Largest Pricing Qu
☐ Display Invoicing Pop-Up M

- Enable Hiding Kit Components
 - This setting allows you to hide kit components from appearing on the receipt.
- Kit Components Disabled on Invoice Screen
 - This setting prevents the cashier from modifying the kit components. Only the Kit trigger can be altered.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	KIT2	KIT- SPRING SPECIAL 2013	1	\$ 179.99	\$ 179.99
0	0		KIT2	0.00			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0014969	COUPLER SET 5PC SOLID BRASS	1	\$ 0.00	\$ 0.00
-2	1		0014969	8.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0016006	DW1808 LONG PILOT BIT REPLAC	1	\$ 0.00	\$ 0.00
-1	5		0016006	3.79			

- Enable Inventory On Hold

- This setting activates the On Hold function.
- This feature allows you to store customer quotes in the invoicing system and identify those items as on hold in the inventory.
- On Hold items are deducted from stock-on-hand (SOH).
- The suggested order report uses the updated SOH to order products accordingly.

Invoice

☐ Require Signature for Returns

☐ Set initial focus on the customer field

☒ Enable Kit Functionality

Kit Class Number

☐ Enable Hiding Kit Components

☐ Kit Components Disabled on Invoice Screen

☒ Enable Inventory On Hold

☐ Default to Largest Pricing Quantity when Added to Invoices

☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts

Inventory		Order Control		Pricing		General		Cancel	
Part #	10111	Desc 1	PAINTBRSH FOAM 2 JEN	On Order:	Defective:	On Hold:	Stock On Hand		
Alt #	082826000068	Desc 2		0	0	12	34		

Review of Section 1.6

Section 1

Invoice

☐ Require Signature for Returns

☐ Set initial focus on the customer field

☒ Enable Kit Functionality

Kit Class Number

☐ Enable Hiding Kit Components

☐ Kit Components Disabled on Invoice Screen

☒ Enable Inventory On Hold

☐ Default to Largest Pricing Quantity when Added to Invoices

☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts

- Default to Largest Pricing Quantity when Added to Invoices
 - When this setting is activated, inventory items that have multiple quantity discount breaks, automatically enter the largest quantity in the **Quantity** field on the invoice.
 - This can be very beneficial in potentially preventing full spools of wire to be sold for a 1-foot price.

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"/>	30238	WIRE 12/2-NMVG 250' FT	250	\$ 0.40	\$ 100.00
63	0		30238	0.50, 100.00/250			

Review of Section 1.7

Section 1

Invoice

☐ Require Signature for Returns

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☒ Enable Kit Functionality

Kit Class Number

☐ Enable Hiding Kit Components

☐ Kit Components Disabled on Invoice Screen


☒ Enable Inventory On Hold

☐ Default to Largest Pricing Quantity when Added to Invoices

☐ Display Invoicing Pop-Up Message for Items with Quantity Discounts

- Display Invoicing Pop-Up Message for Items with Quantity Discounts
 - This setting enables a pop-up box which alerts the cashier that the item has multiple quantity discount breaks.

Item Quantity Pricing Cancel X

 **This item has multiple pricing levels**

Verify that the quantity entered matches the quantity being sold.

OK [F8]

Review of Section 2.1

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

<input checked="" type="checkbox"/> Cash	▲
<input type="checkbox"/> Charge	▬
<input type="checkbox"/> Credit Card	▬
<input checked="" type="checkbox"/> Check	▼

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

☒ Disable Automatic Receipt at Checkout

☐ Add Alternate Part Numbers from Invoicing

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Account #

☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders

- Open Cash Drawer For Selected Payment Types (store specific setting)
 - This setting allows you to determine when the cash drawer opens based on the payment type.
 - Check the checkbox next to desired payment types.
- Don't Open Cash Drawer for Zero Dollar Cash Sales
 - This setting allows you disable the cash drawer from opening for cash transactions that have a zero balance.

Review of Section 2.2

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

<input checked="" type="checkbox"/> Cash
<input type="checkbox"/> Charge
<input type="checkbox"/> Credit Card
<input checked="" type="checkbox"/> Check

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

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Core Charge Identifier:

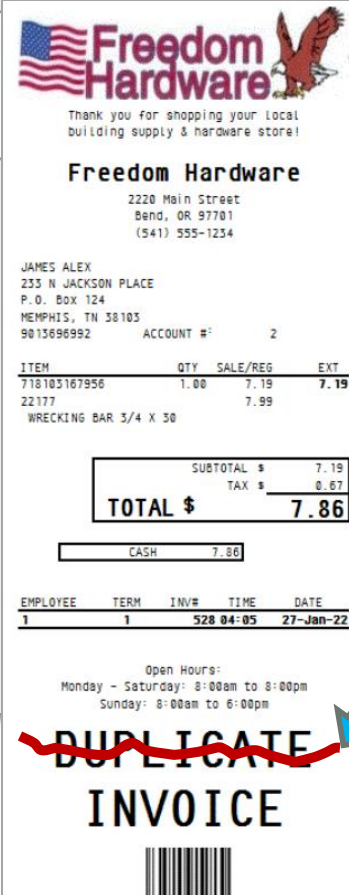
☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Account #

☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders



Freedom Hardware
Thank you for shopping your local building supply & hardware store!

Freedom Hardware
2220 Main Street
Bend, OR 97701
(541) 555-1234

JAMES ALEX
235 N JACKSON PLACE
P.O. Box 124
MEMPHIS, TN 38103
9013696992 ACCOUNT # 2

ITEM	QTY	SALE/REG	EXT
718103167956	1.00	7.19	7.19
22177		7.99	
WRECKING BAR 3/4 X 50			


SUBTOTAL \$	7.19
TAX \$	0.67
TOTAL \$	7.86

CASH 7.86

EMPLOYEE	TERM	INV#	TIME	DATE
1	1	528	04:05	27-Jan-22

Open Hours:
Monday - Saturday: 8:00am to 8:00pm
Sunday: 8:00am to 6:00pm

~~DUPLICATE~~
INVOICE



- Disable Automatic Receipt at Checkout
 - This setting allows you turn off the printing of all receipts at checkout.
 - Recently added -- Ability to remove the word "DUPLICATE" for first time reprint, if automatic receipt printing at checkout is disabled.

Review of Section 2.3

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

<input checked="" type="checkbox"/> Cash	▲
<input type="checkbox"/> Charge	▬
<input type="checkbox"/> Credit Card	▬
<input checked="" type="checkbox"/> Check	▼

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

☒ Disable Automatic Receipt at Checkout

☐ Add Alternate Part Numbers from Invoicing

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Account #

☒ Filter Yard Order Printing by Inventory Location


Location: to

☐ Auto Print Yard Orders

- Add Alternate Part Numbers from Invoicing
 - This setting prompts for a new alternate part number if the scanned item is not recognized during invoicing.
 - The RF Gun works much the same way if an item is not recognized when scanned.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1111				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

Part Number Not Found

 **PART NUMBER NOT FOUND**

The part number "1111" was not found.

Search for this part by an another part number?

Alternate Part Number:

OK [F8] Cancel

Note:

This setting will associate the alternate part number with the first item scanned.

Review of Section 2.4

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

<input checked="" type="checkbox"/> Cash
<input type="checkbox"/> Charge
<input type="checkbox"/> Credit Card
<input checked="" type="checkbox"/> Check

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

☒ Disable Automatic Receipt at Checkout

☐ Add Alternate Part Numbers from Invoicing

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Account #

☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders

- Use Alternate Core Charge Identifier
 - This setting enables you to change the name of the Core Charge Identifier in the Inventory module, on the **General** Tab.
 - The new name will appear on all invoices and reports that contain a core charge item.
 - A new core charge class-breakdown report is available.

2 ▼ Item Information Serial#: ☐ Ext Sync: ☐ Non-Inventory: ☐

Autotext:

Location:

Dept: Tax Code:

U/M: # Bintags: Print Later: ☐

Weight: Item Tag Required: ☐

C/U Qty: Label:

Review of Section 2.5

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

☒ Cash
☐ Charge
☐ Credit Card
☒ Check

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales
☒ Disable Automatic Receipt at Checkout
☐ Add Alternate Part Numbers from Invoicing
☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows
☒ Display Only Quotes that Match Account #
☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders

- Disable Auto-Combining of Rows
 - By selecting this option, items scanned more than once in the same invoice will remain on a separate line.
 - Cashiers still have the ability to increase the quantity field manually, as desired.

Invoice / Quote			Checkout		
Rewards	<input type="text"/>	Customer	<input type="text"/>	Address 2	
Credit	<input type="text"/>	Address 1	<input type="text"/>	City/State/Zip	
Tax	Def	Net	Part Number	Description	Quantity
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10111	PAINTBRSH FOAM 2 JEN	EACH
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10111	1.19, 4.99/5, 7.99/10	20
34	0		10111 - PAINTBRSH FOAM 2 JEN - Qty 10		
			Combined with line 1		NO

Review of Section 2.6

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

☒ Cash
☐ Charge
☐ Credit Card
☒ Check

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales
☒ Disable Automatic Receipt at Checkout
☐ Add Alternate Part Numbers from Invoicing
☒ Use Alternate Core Charge Identifier
 Core Charge Identifier:

☐ Disable Auto-Combining of Rows
☒ Display Only Quotes that Match Account #
☒ Filter Yard Order Printing by Inventory Location
 Location: to
☐ Auto Print Yard Orders

Recall Transaction

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

☒ Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
CHARLES OWEN	Quote # 1: THIS IS A SAMPLE STORED QU...			09-Mar-22 13:23	1	0
BIRCH HUNT	QUOTE FOR STUFF			25-Nov-19 10:44	1	3
DEBRA	Getting truck filled 9-20-18			21-Sep-18 12:54	1	4
BROGAN	ACE SHOW			17-Aug-18 14:39	1	1
DEBRA GILL - HOUSE ACCESS...	HOLD FOR PICK UP NEXT MONTH			17-May-13 07:39	1	4

- Basically, by unselecting the box, it will automatically default to “Show for all customers” option, when recalling quotes.

Review of Section 2.7

Section 2

Open Cash Drawer For Selected Payment Types (store specific setting)

<input checked="" type="checkbox"/> Cash	▲
<input type="checkbox"/> Charge	▬
<input type="checkbox"/> Credit Card	▬
<input checked="" type="checkbox"/> Check	▼

☐ Don't Open Cash Drawer for Zero Dollar Cash Sales

☒ Disable Automatic Receipt at Checkout

☐ Add Alternate Part Numbers from Invoicing

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

☐ Disable Auto-Combining of Rows

☒ Display Only Quotes that Match Account #

☒ Filter Yard Order Printing by Inventory Location

Location: to

☐ Auto Print Yard Orders

- Filter Yard Order Printing by Inventory Location
 - This option allows you to filter yard orders to only show items that are in the yard. It will exclude non-yard items or instore only items.
 - It uses the “Location” code range to determine which items are in the yard.
- Auto Print Yards Orders
 - When this option is selected, yard orders will print automatically when the invoice is completed.
 - Can print at checkout or on a printer in the yard

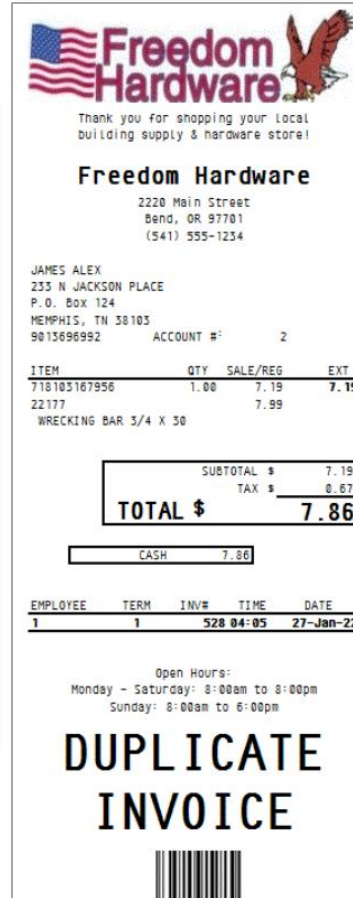
Review of Section 3.1

Section 3

- ☐ Use Receipt Printer for Invoice Reprint
- ☐ Hide Item Regular Retail On Invoice
- ☒ Invoice F4/Discount Respects Min Margin
- ☒ Invoice F4/Discount Applies to Manually Priced Items
- ☒ Capture Return Item Invoice Number
- ☒ Display Description 2 in Invoice/Quote
- ☐ Block Description 2 from Invoices and Reprints
- ☐ Disable Customer Stored Transaction Count Popup
- ☐ Do Not Accept Checks From Non-Charge Customer Accounts

Deleted Part Behavior

Auto Restore



Freedom Hardware
Thank you for shopping your local building supply & hardware store!

Freedom Hardware
2220 Main Street
Bend, OR 97701
(541) 555-1234

JAMES ALEX
233 N JACKSON PLACE
P.O. Box 124
MEMPHIS, TN 38103
9013698992 ACCOUNT # 2

ITEM	QTY	SALE/REG	EXT
718103167956	1.00	7.19	7.19
22177		7.99	
WRECKING BAR 3/4 X 30			


SUBTOTAL \$	7.19
TAX \$	0.67
TOTAL \$	7.86

CASH 7.86

EMPLOYEE	TERM	INV#	TIME	DATE
1	1	528 04 05		27-Jan-22

Open Hours:
Monday - Saturday: 8:00am to 8:00pm
Sunday: 8:00am to 6:00pm

DUPLICATE INVOICE



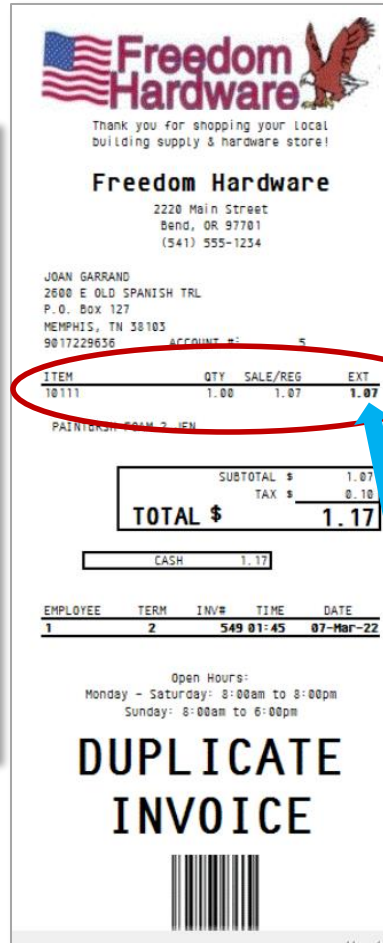
- Use Receipt Printer for Invoice Reprint
 - When recalling receipts and selecting the “Print” option, rather than printing to a PDF document, an original looking duplicate receipt will print to the actual receipt printer.

Review of Section 3.2

Section 3

- ☐ Use Receipt Printer for Invoice Reprint
- ☐ Hide Item Regular Retail On Invoice
- ☒ Invoice F4/Discount Respects Min Margin
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Deleted Part Behavior Auto Restore



Freedom Hardware
Thank you for shopping your local building supply & hardware store!

Freedom Hardware
2220 Main Street
Bend, OR 97701
(541) 555-1234

JOAN GARRAND
2600 E OLD SPANISH TRL
P.O. Box 127
MEMPHIS, TN 38103
9017229636 ACCOUNT # 5

ITEM	QTY	SALE/REG	EXT
10111	1.00	1.07	1.07

PAINTERS BOOM 2 JEN


SUBTOTAL \$ 1.07
TAX \$ 0.10
TOTAL \$ 1.17

CASH 1.17

EMPLOYEE	TERM	INV#	TIME	DATE
1	2	549 01:45		07-Mar-22

Open Hours:
Monday - Saturday: 8:00am to 8:00pm
Sunday: 8:00am to 6:00pm

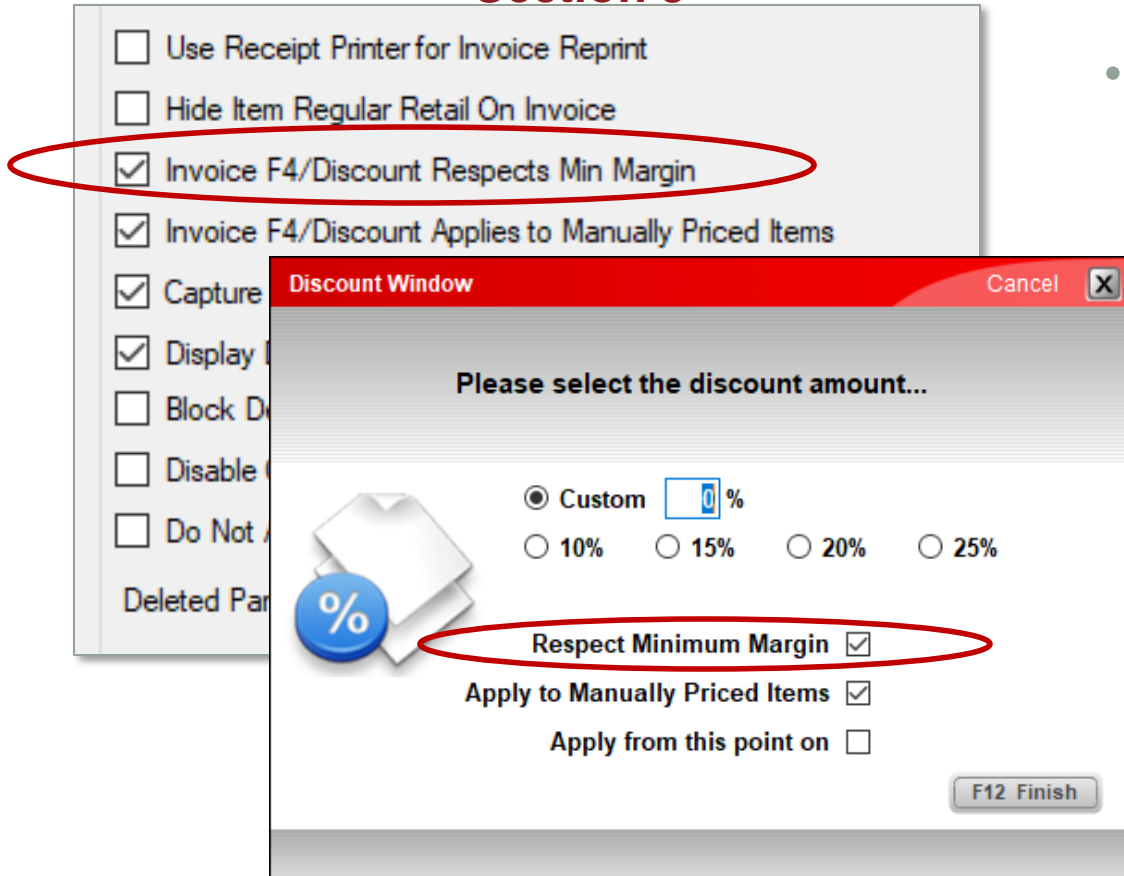
DUPLICATE INVOICE



- Hide Item Regular Retail On Invoice
 - This setting hides the regular price on the receipt and only displays the sale or discounted price.
 - The sales price will show as the regular price.
- If regular price = \$1.19
- And sale price = \$1.07
- The receipt will only show \$1.07

Review of Section 3.3

Section 3



☐ Use Receipt Printer for Invoice Reprint

☐ Hide Item Regular Retail On Invoice

☒ Invoice F4/Discount Respects Min Margin

☒ Invoice F4/Discount Applies to Manually Priced Items

☒ Capture

☒ Display

☐ Block D

☐ Disable

☐ Do Not

Deleted Par

Discount Window Cancel X

Please select the discount amount...

☒ Custom %

☐ 10% ☐ 15% ☐ 20% ☐ 25%

☒ Respect Minimum Margin

☒ Apply to Manually Priced Items

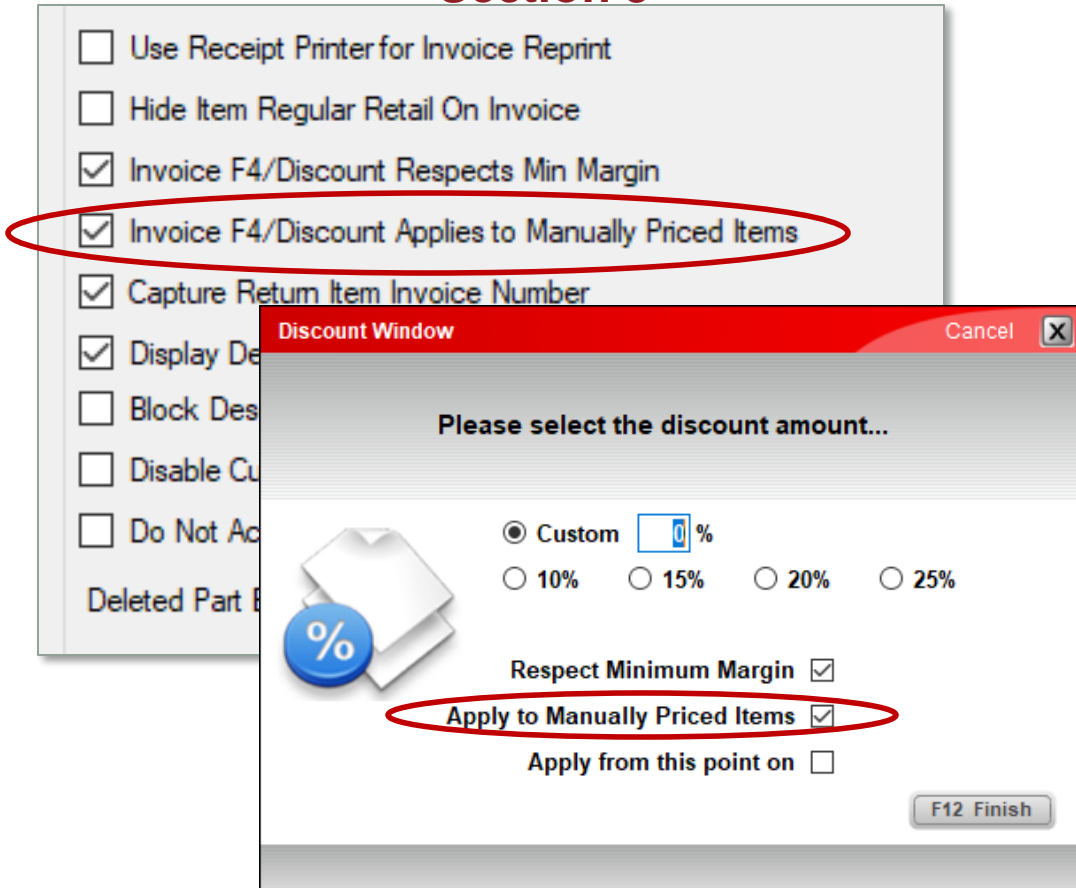
☐ Apply from this point on

F12 Finish

- Invoice F4/Discount Respects Min Margin
 - If selected, when using the **F4/Discount** command in the **Invoice/Quote** module, the Minimum Margin is always maintained unless a manager override is performed.
 - This choice can be modified at checkout using a manager override.

Review of Section 3.4

Section 3



The image shows two overlapping windows from a software application. The background window, titled 'Section 3', contains a list of settings. The option 'Invoice F4/Discount Applies to Manually Priced Items' is checked and circled in red. The foreground window, titled 'Discount Window', is a modal dialog for selecting a discount amount. It has a red title bar with 'Cancel' and a close button. The dialog asks 'Please select the discount amount...' and offers radio button options: 'Custom' (selected), '10%', '15%', '20%', and '25%'. Below these, there are three checkboxes: 'Respect Minimum Margin' (checked), 'Apply to Manually Priced Items' (checked and circled in red), and 'Apply from this point on' (unchecked). A blue percentage icon is on the left. At the bottom right is an 'F12 Finish' button.

☐ Use Receipt Printer for Invoice Reprint

☐ Hide Item Regular Retail On Invoice

☒ Invoice F4/Discount Respects Min Margin

☒ Invoice F4/Discount Applies to Manually Priced Items

☒ Capture Return Item Invoice Number

☒ Display De

☐ Block Des

☐ Disable Cu

☐ Do Not Ac


Deleted Part B

Discount Window Cancel X

Please select the discount amount...

☒ Custom %

☐ 10% ☐ 15% ☐ 20% ☐ 25%



Respect Minimum Margin ☒

☒ Apply to Manually Priced Items

Apply from this point on ☐

F12 Finish

- Invoice F4/Discount Applies to Manually Priced Items
 - If this option selected, dump SKU's being used during checkout are included in invoice F4/Discounting.
 - This choice can be modified at checkout using a manager override.

Review of Section 3.5

Section 3

- ☐ Use Receipt Printer for Invoice Reprint
- ☐ Hide Item Regular Retail On Invoice
- ☒ Invoice F4/Discount Respects Min Margin
- ☒ Invoice F4/Discount Applies to Manually Priced Items
- ☒ Capture Return Item Invoice Number
- ☒ Display Description 2 in Invoice/Quote
- ☐ Block Description
- ☐ Disable Customer
- ☐ Do Not Accept Deleted Part Behavior

Return Item Invoice Number [Cancel]

RETURN ITEM INVOICE NUMBER

Enter the original Invoice Number for this return item:

10111

Invoice Number:

OK [F8]

• Capture Return Item Invoice Number

- By activating this option, the system will prompt for the original invoice number when returning items at checkout.
- If no original invoice number is entered, it will show as “Skipped by Cashier”.
- This helps to enforce best practices when processing returns.

Tax	Def	Net	Part Number	Description	Quantity
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10111	PAINTBRSH FOAM 2 JEN	-1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10111	1.19, 4.99/5, 7.99/10	
27	27	0	Return Item: 10111 - Original Invoice # Skipped by cashier		NO

Review of Section 3.6

Section 3

- ☐ Use Receipt Printer for Invoice Reprint
- ☐ Hide Item Regular Retail On Invoice
- ☒ Invoice F4/Discount Respects Min Margin
- ☒ Invoice F4/Discount Applies to Manually Priced Items
- ☒ Capture Return Item Invoice Number
- ☒ Display Description 2 in Invoice/Quote
- ☐ Block Description 2 from Invoices and Reprints
- ☐ Disable Customer Stored Transaction Count Popup
- ☐ Do Not Accept Checks From Non-Charge Customer Accounts

Deleted Part Behavior

- Display Description 2 in Invoice/Quote
 - If selected, the product description 2 in the **Inventory** module, is displayed on the checkout screen.
- Block Description 2 from Invoices and Reprints
 - If selected, the product description 2 in the Inventory module, is not displayed on the receipt.

Invoice / Quote
Checkout
Cancel

Rewards
 Credit

Customer
 Address 1

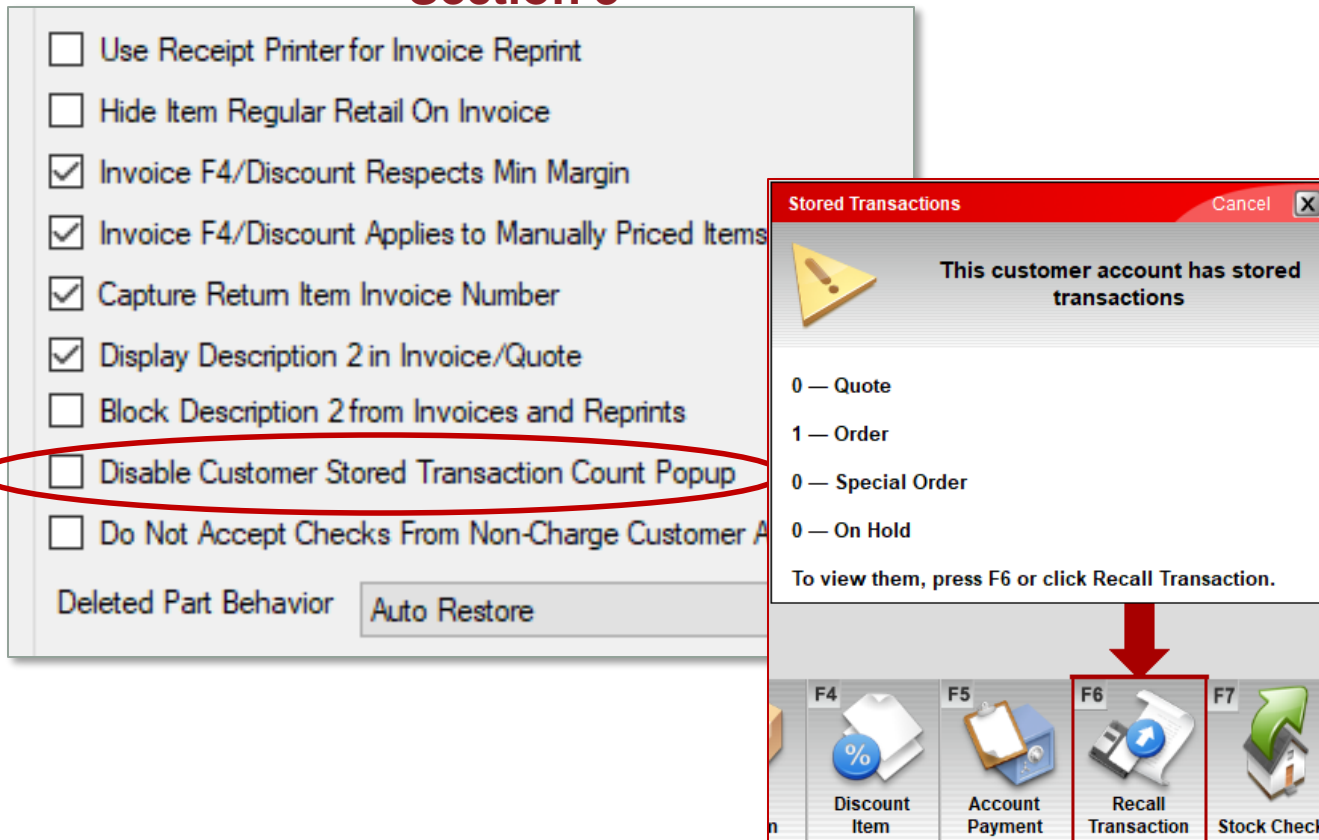
Address 2
 City/State/Zip

Phone
 Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10111	PAINTBRSH FOAM 2 JEN WASH WITH SOAP AND WATER	1	\$ 1.19	\$ 1.19
27	0		10111	1.19, 4.99/5, 7.99/10			

Review of Section 3.7

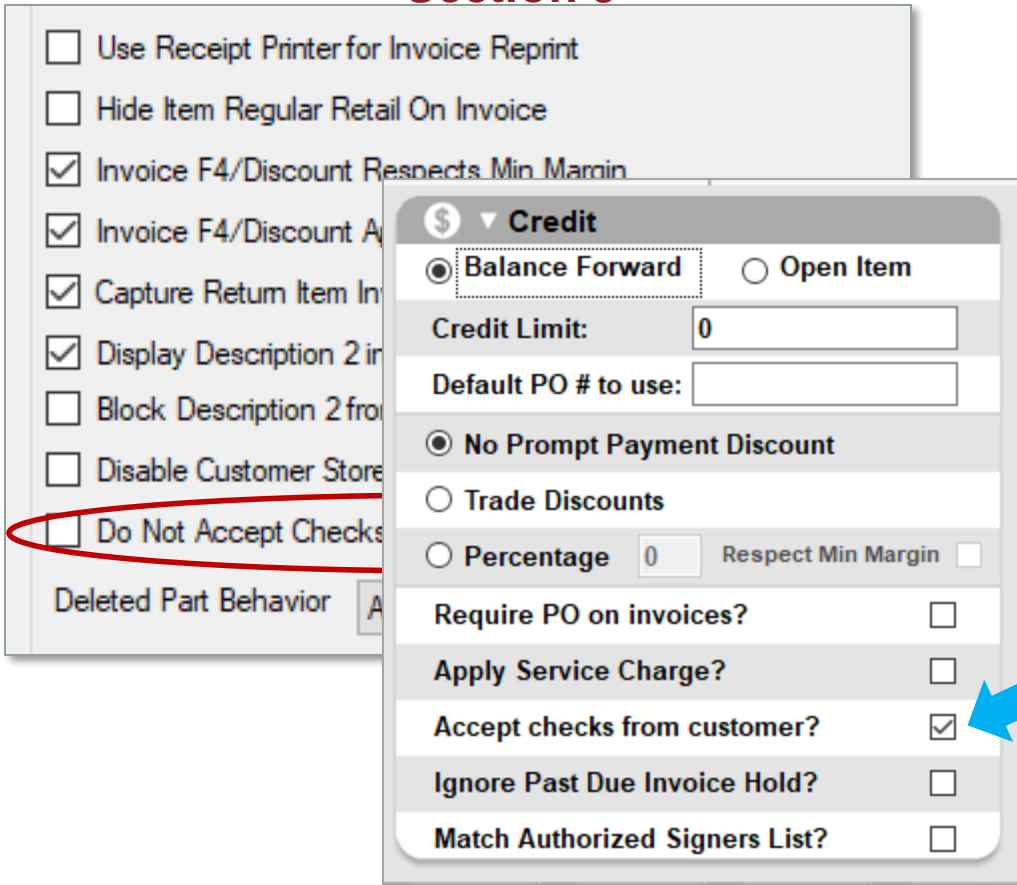
Section 3



- Disable Customer Stored Transaction Count Popup
 - Selecting this option will suppress the automatic popup box showing that the customers has active quotes, orders, special orders, or on-hold stored for the customer.
 - This is very helpful information, and it is recommended that this setting remain unselected.

Review of Section 3.8

Section 3



☐ Use Receipt Printer for Invoice Reprint

☐ Hide Item Regular Retail On Invoice

☒ Invoice F4/Discount Respects Min Margin

☒ Invoice F4/Discount A

☒ Capture Return Item In

☒ Display Description 2 in

☐ Block Description 2 from

☐ Disable Customer Store

☐ Do Not Accept Checks

Deleted Part Behavior A

Credit

☒ Balance Forward ☐ Open Item

Credit Limit: 0

Default PO # to use:

☒ No Prompt Payment Discount

☐ Trade Discounts

☐ Percentage 0 Respect Min Margin ☐

Require PO on invoices? ☐

Apply Service Charge? ☐

Accept checks from customer? ☒

Ignore Past Due Invoice Hold? ☐

Match Authorized Signers List? ☐

- Do Not Accept Checks From Non-Charge Customer Accounts
 - When this option is selected, by default all non-charge account customers will not have the ability to use checks as a payment during checkout.
 - Exceptions can be made for specific non-charge account customers by checking the “Accept checks from customer” checkbox in the **Customer** module, under the **Credit** tab.

Review of Section 3.9

Section 3

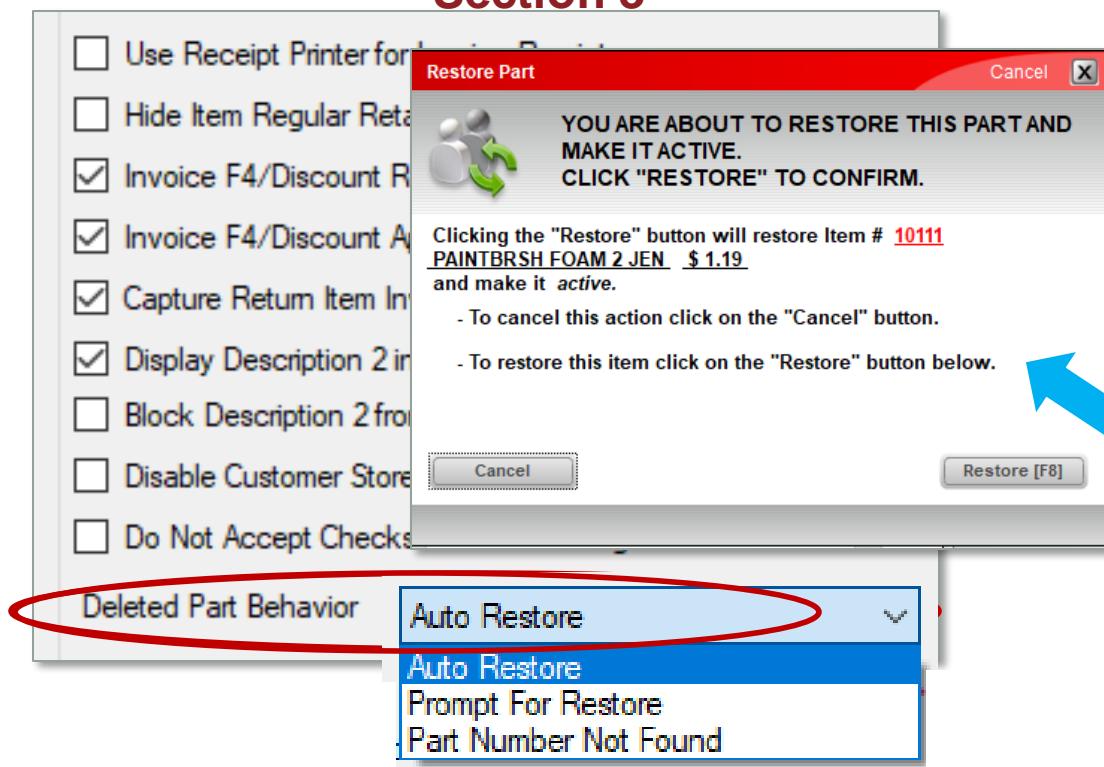
• Deleted Part Behavior

• This option gives you a choice on how to handle deleted inventory items when they are entered during the checkout/invoicing process.

- **Auto-Restore** – Automatically restores the previously deleted inventory item for an immediate sale without any interruption at checkout.

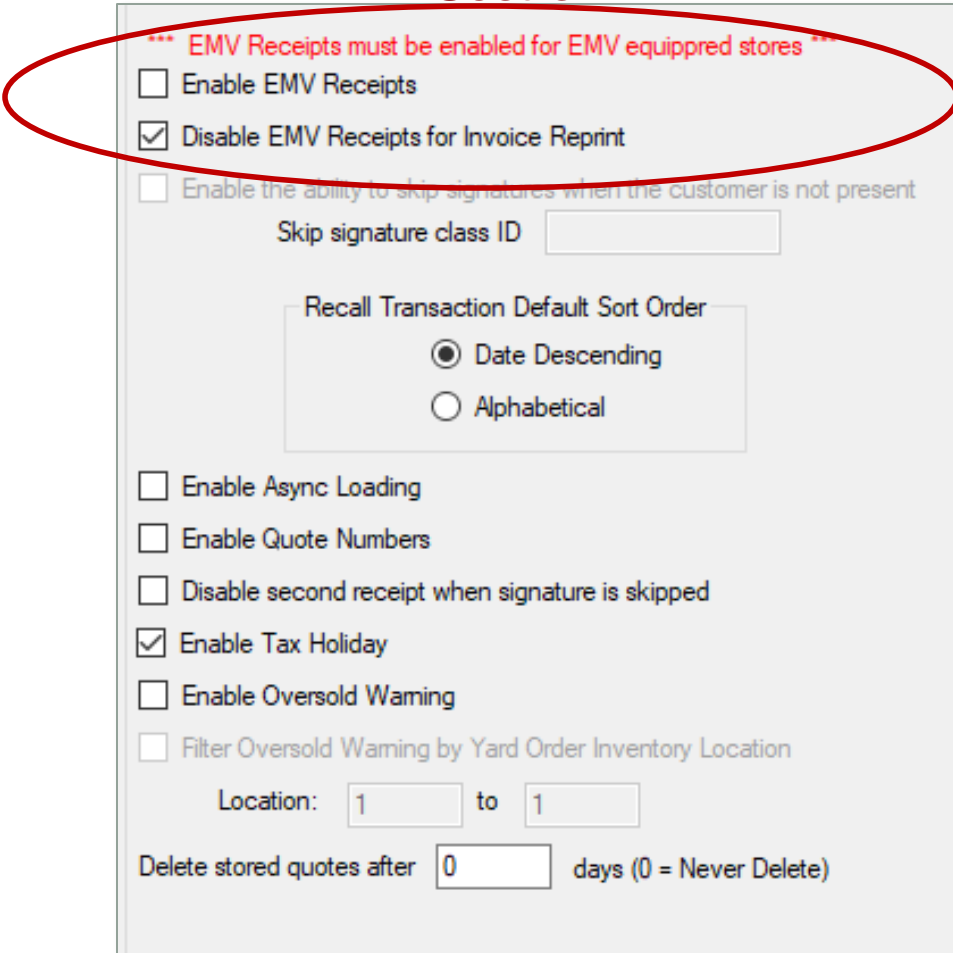
- **Prompt For Restore** – Will prompt the cashier if they wish to restore this previously deleted part number.

- **Part Number Not Found** – The message “Part Number Not Found” will appear, and the cashier will need a manager’s assistance to restore the previously deleted part number.



Review of Section 4.1

Section 4



*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)

- Enable EMV Receipts
 - This setting was added when EMV hit the scene back in 2015. At that time Visa/MC required EMV information to be printed on the receipts. Since that time, they have rescinded the requirement. In almost all cases this setting can be disabled.
- Disable EMV Receipts for Invoice Reprint
 - If the above option is selected, this enables the capability to print the EMV information on receipts that are reprinted any time after the original invoicing event.

Review of Section 4.2

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☒ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

☒ Enable Tax Holiday

☒ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)

- Enable the ability to skip signatures when the customer is not present
 - This setting was added specifically for pharmacies and is necessary for back-end pharmacies that have minimal to no foot traffic in the store.
 - This setting is grayed out for all stores except pharmacies.
- Skip signature class ID
 - A class ID must be added to match the Prescription Class ID in order to skip signatures.

Review of Section 4.3

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)



- Recall Transaction Default Sort Order
- This setting effects the default sort order when recalling transactions (stored quotes) in the Invoice/Quote module, Recall Transaction (F6).

Recall Transaction

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

Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
BIRCH HUNT	QUOTE FOR STUFF			20-Nov-19 10:44	1	3
DEBRA	Getting truck filled 9-20-18			21-Sep-18 12:54	1	4
BROGAN	ACE SHOW	✓		17-Aug-18 14:39	1	1
chas owen				11-Jun-18 09:59	1	0
SAVED QUOTE	FOR MAX			22-Aug-15 11:12	1	0
Josh	Fence job			12-Mar-15 15:24	1	0
12345				19-Feb-15 11:36	1	0

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

Review of Section 4.4

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)

- Enable Async Loading
 - This option is grayed-out for customers and is intended only for Paladin technicians.

Review of Section 4.5

Section 4

- Enable Quote Numbers

- When this setting is activated, quotes will automatically be assigned a quote number.
- The quote number is shown in the quote memo and presented as a note on the first line of the quote and can be used for recalling stored quotes.

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☒ Enable Quote Numbers

☐ Disable second receipt when s

☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Y

Location: to

Delete stored quotes after

Invoice / Quote Checkout

Recall Transaction

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

☐ Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
CHARLES OWEN	Quote # 1: THIS IS A SAMPLE STORED Q...			09-Mar-22 13:23	1	0

-30 0 10111 1.19, 4.99/5, 7.99/10

Review of Section 4.6

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

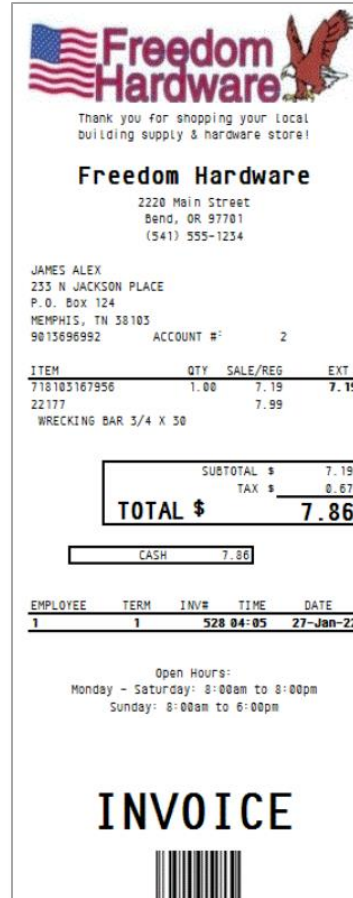
☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)



Freedom Hardware
Thank you for shopping your local building supply & hardware store!

Freedom Hardware
2220 Main Street
Bend, OR 97701
(541) 555-1234

JAMES ALEX
233 N JACKSON PLACE
P.O. Box 124
MEMPHIS, TN 38103
9013698992 ACCOUNT # 2

ITEM	QTY	SALE/REG	EXT
718103167956	1.00	7.19	7.19
22177		7.99	
WRECKING BAR 3/4 X 30			


SUBTOTAL \$ 7.19
TAX \$ 0.67
TOTAL \$ 7.86

CASH 7.86

EMPLOYEE	TERM	INV#	TIME	DATE
1	1	528 04 05		27-Jan-22

Open Hours:
Monday - Saturday: 8:00am to 8:00pm
Sunday: 8:00am to 6:00pm

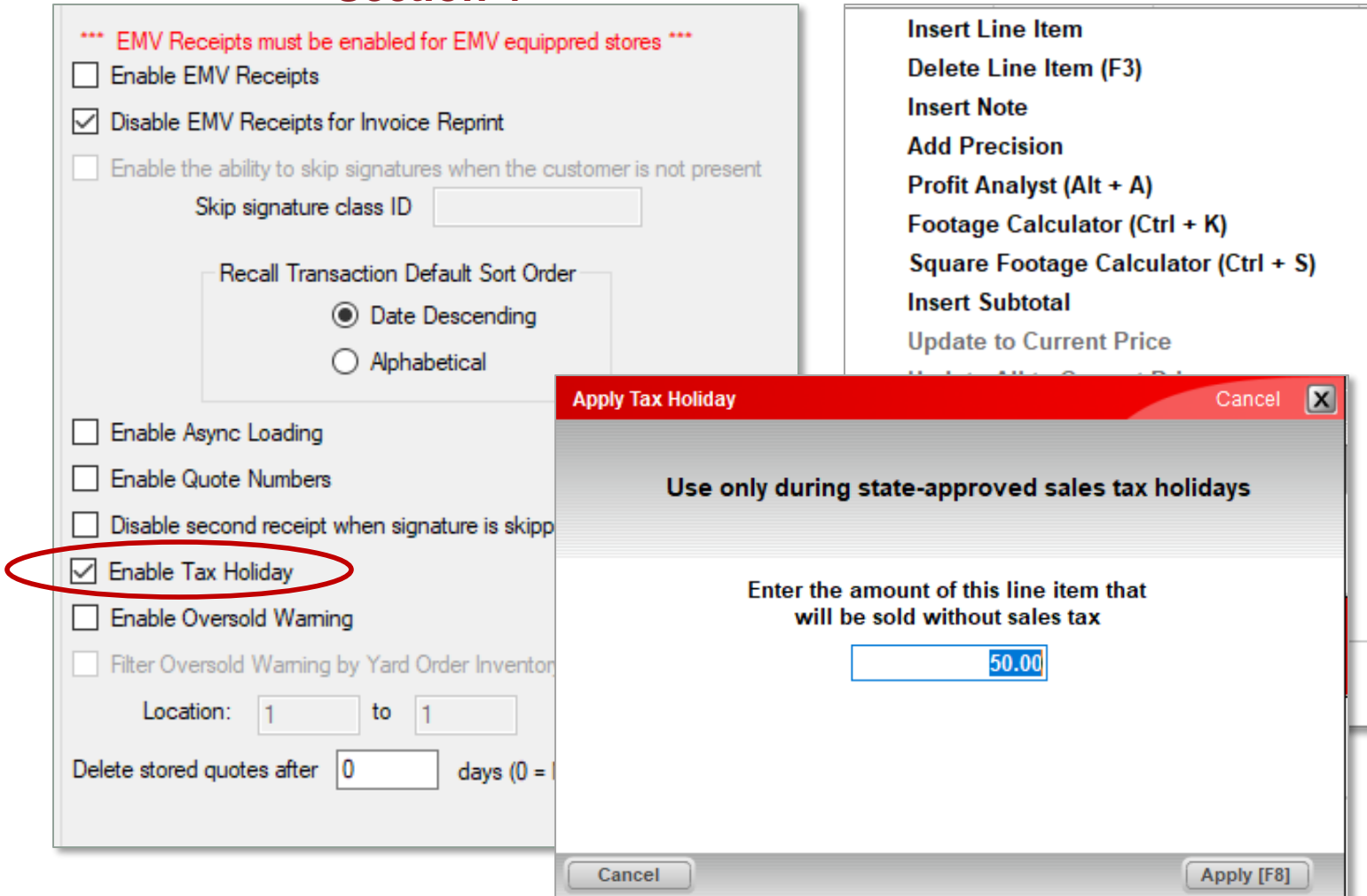
INVOICE



- Disable second receipt when signature is skipped
 - If this option is selected, when the signature is skipped during the checkout process, only one receipt will print at the conclusion of checkout.

Review of Section 4.7

Section 4



The image shows two overlapping windows from a software application. The background window is titled 'Section 4' and contains various settings. The foreground window is titled 'Apply Tax Holiday' and is used for applying a tax holiday to a specific line item.

Section 4 Settings:

- *** EMV Receipts must be enabled for EMV equipped stores ***
- ☐ Enable EMV Receipts
- ☒ Disable EMV Receipts for Invoice Reprint
- ☐ Enable the ability to skip signatures when the customer is not present
- Skip signature class ID:
- Recall Transaction Default Sort Order:
 - ☒ Date Descending
 - ☐ Alphabetical
- ☐ Enable Async Loading
- ☐ Enable Quote Numbers
- ☐ Disable second receipt when signature is skipped
- ☒ Enable Tax Holiday
- ☐ Enable Oversold Warning
- ☐ Filter Oversold Warning by Yard Order Inventory
- Location: to
- Delete stored quotes after days (0 = never)

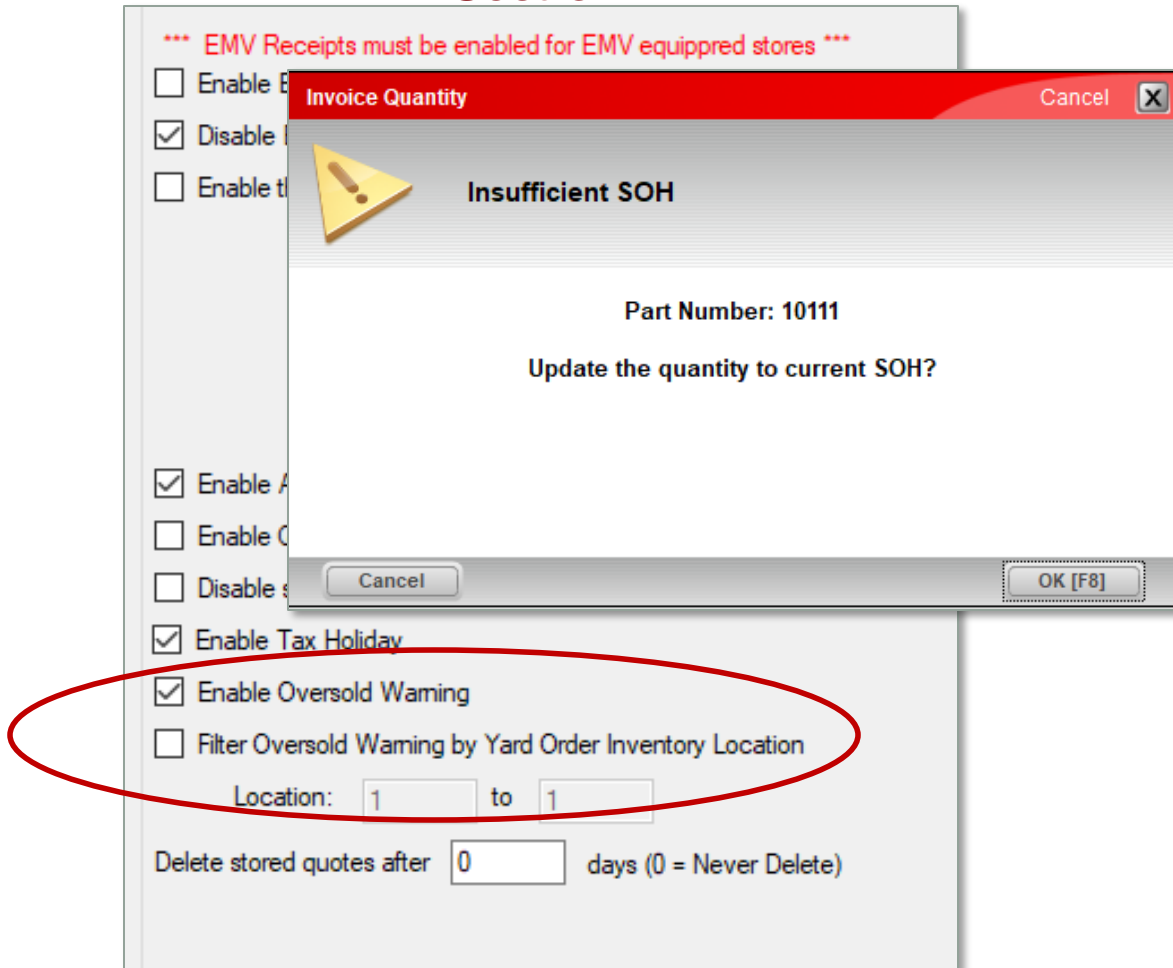
Apply Tax Holiday Dialog:

- Use only during state-approved sales tax holidays
- Enter the amount of this line item that will be sold without sales tax:
- Buttons: Cancel, Apply [F8]

- Enable Tax Holiday
 - If the above option is selected, the Tax Holiday (Ctrl+T) feature is activated.
 - This will enable your store to participate in the tax-free holiday program offered by some local & state agencies.
 - Right click and select Tax Holiday or press on Ctrl+T.
 - Then enter the tax-free amount. Paladin handles the rest.

Review of Section 4.8

Section 4




*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable B

☒ Disable

☐ Enable t

Invoice Quantity Cancel X

 **Insufficient SOH**

Part Number: 10111

Update the quantity to current SOH?

Cancel OK [F8]

☒ Enable A

☐ Enable C

☐ Disable s

☒ Enable Tax Holiday

☒ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: 1 to 1

Delete stored quotes after 0 days (0 = Never Delete)

- Enable Oversold Warning

- If enabled, the system will automatically display an “Oversold Warning” message when the selling quantity exceeds the stock-on-hand in the inventory.

- Filter Oversold Warning by Yard Order Inventory Location

- If you want to use this feature but feel it’s not always necessary to display the oversold warning message for all products, you can limit it to specific location range.

Review of Section 4.9

Section 4

*** EMV Receipts must be enabled for EMV equipped stores ***

☐ Enable EMV Receipts

☒ Disable EMV Receipts for Invoice Reprint

☐ Enable the ability to skip signatures when the customer is not present

Skip signature class ID

Recall Transaction Default Sort Order

☒ Date Descending

☐ Alphabetical

☐ Enable Async Loading

☐ Enable Quote Numbers

☐ Disable second receipt when signature is skipped

☒ Enable Tax Holiday

☐ Enable Oversold Warning

☐ Filter Oversold Warning by Yard Order Inventory Location

Location: to

Delete stored quotes after days (0 = Never Delete)

- Delete stored quotes after days (0 = Never Delete)
- If a number is entered in the open box, stored quotes will be permanently deleted from the system, automatically, every desired number of days.

Recall Transaction Cancel

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

☒ Show for all customers

Name	Memo	Order	Store	Date	Emp #	Acct #
CHARLES OWEN	Quote # 1: THIS IS A SAMPLE STORED QU...			09-Mar-22 13:23	1	0
BIRCH HUNT	QUOTE FOR STUFF			25-Nov-19 10:44	1	3
DEBRA	Getting truck filled 9-20-18			21-Sep-18 12:54	1	4
BROGAN	ACE SHOW		<input checked="" type="checkbox"/>	17-Aug-18 14:39	1	1
DEBRA GILL - HOUSE	CESS... HOLD FOR PICK UP NEXT MONTH			17-May-13 07:39	1	4

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

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April 5 at 9am PT

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