



Paladin Spring Cleaning Will Improve Business Performance

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WHAT YOU'LL LEARN

Paladin Spring Cleaning

- Why do it and what are the potential benefits?
- Clearing out digital clutter
- Operational alterations
- Computer maintenance
- Reinvest for greater returns
- How can we help:
 - Swifter™ -- Cleans up and thins out the database for major performance improvements
 - ManagedUpdates™ -- Paladin manages computer updates so you don't have to.

Why do it?



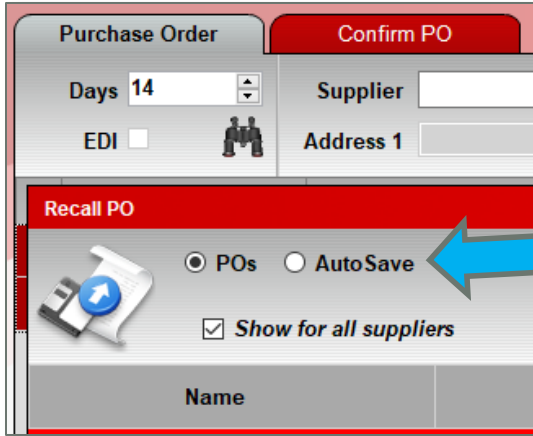
- Before the digital revolution, spring cleaning your business meant cleaning out your paper files and filling trash cans.
- Even though most of those documents are now stored on computer files, the National Federation of Independent Business (NFIB) says it's still a good idea to ditch those old items.

What are the potential benefits?



- Performance improvements
- Added security and privacy
- Backup file and recovery protection
- Reduced clutter on the hard drive
- Keep up-to-date with current software
- Help to maintain PCI compliancy
- Better organization and efficiency

Clearing out digital clutter




Purchase Order Confirm PO

Days 14 Supplier

EDI Address 1

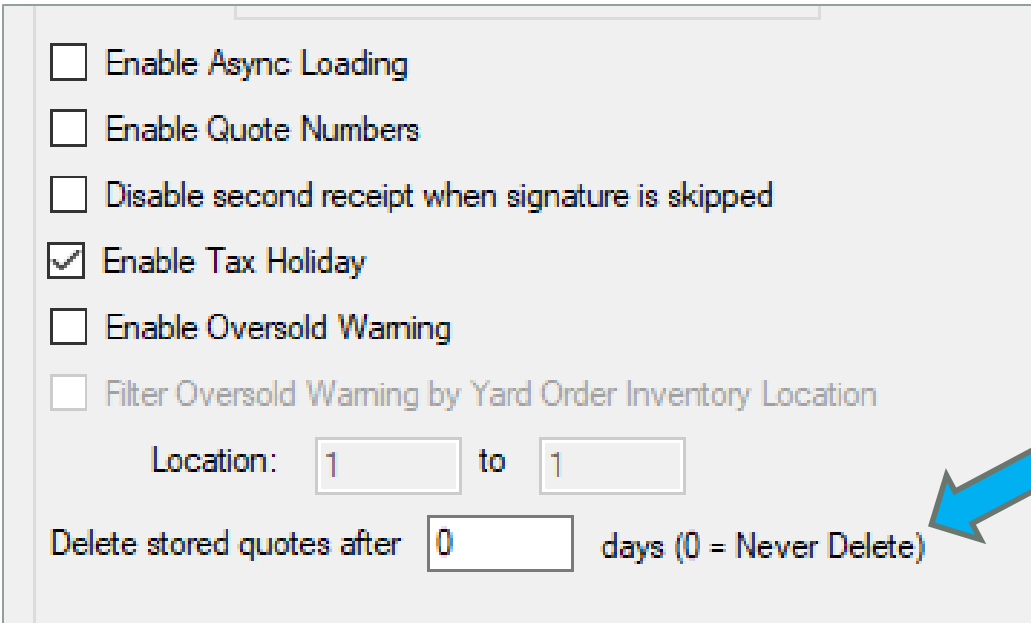
Recall PO

 POs AutoSave

Show for all suppliers

Name

File->Setup->Invoice(Store) tab



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: 1 to 1

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

- Deleting outdated stored purchase orders. (include auto-saved PO's as well)
- Cancelling outdated sent and open purchase orders.
- Thinning out electronic communications – emails and texts.
- Clearing out all old TEMP/TMP files.
- Deleting expired stored quotes, on-holds, and special orders. (activate auto-delete for quotes)

Clearing out digital clutter...(continued)



- Remove old backups – (Save backups from both ending and beginning months – 1st & 31st). Click on the Paladin Backups icon on your desktop or go to:
<C:\PaladinPOS\Backups>

Spring is the perfect time to clear out that old stuff and make room for the new fiscal year.

Operational alterations

small changes
can have
a big
impact

<http://dotyinc.com/small-changes>

- Re-evaluate your goals and objectives for the current year. (*See [Paladin Retail Science- Retailer's Toolbox-One Page Business Plan](#)*)
- Re-instate cycle counting 4-foot sections daily.
- Use Suggested Ordering (SOR) if not using it.
- Get your receivables in order – Print the Accounting Summary Report and start a campaign to get your customers current.
- Run Slow-Movers Report and begin replacing slow movers with items that turn. (*See [Webinar: Tips & Tricks: Cascading Sales Can Brighten Your Holidays](#)*)

One Page Annual Business Plan

Profitable Project Worksheet

Name of Project:

Is your project promoted in the following places?

In-store Your website Facebook Twitter

One Page Annual Business Plan

What is your business's name and overview?

How does your business positively impact your community?

What is your business specialty or niche market?

How is your business different than your top 3 competitors?

What are your business's top 3 goals for the next year?

How will you meet the goals above?

What challenges do you currently face, and what challenges do you foresee?

How will you measure your success, and how will you celebrate it?

- Paladin Retail Science - Retailer's Toolbox-
- <https://paladinpointofsale.com/retailscience/home/retailers-toolbox/>

One-Page Business Plan

- A simple outline to help you achieve your goals.

Profitable Project Worksheet

- A project outline to line your project up for success.

Computer maintenance



- Verify Dell drivers are up to date
- Verify Windows 10 or 11 OS is up to date
- Verify Paladin software is up to date
 - Current Build is: 2.2204.4963.4

Reinvest for greater returns



- Invest in your technology – Implement a plan to upgrade your computer devices over the next 12 months. Start with failing devices and slow performers.
- Invest in advanced training and consulting. Leverage the self-help tools in the Paladin help portal or contact Paladin for training.
- Invest time in learning more how the Paladin solution can help give you your life back.

Swifter™



- Paladin Swifter™ prevents old data from slowing your system down.
- Obsolete information can cause your POS system to run slowly.
- Paladin Swifter™ removes the clutter to make your store run faster and more efficiently.
 - Faster searches
 - Faster backups
 - Faster reports
 - Faster ordering

Swifter™ ...Continued



Single Store Only
\$499

Your original data is safe and secure

1. A backup of your original data is created and verified.
2. A copy of the original data is placed on your business network.
3. A second copy is optimized by our technicians.
4. The new, optimized data is installed on your system.

ManagedUpdates™

ManagedUpdates™ Paladin manages Windows updates so you don't have to.

- Test and verify. Pending updates are tested to ensure their performance on your computers.
- Security updates. Windows® updates protect computers from cyberattacks.
- PCI compliance. Installing the latest security patches keeps computer software updated and secure as required in PCI compliance.



Next webinar:

Paladin Pointers: Automating Sales, Promotions and Trade Discounts

June 7 at 9am PT

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