



Paladin Pointers: Advanced Sales – BOGOs and More

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WHAT YOU'LL LEARN

- Benefits of BOGO sales
- How does a BOGO sale work
- How to:
 - Set up a BOGO sale list
 - Set up a BOGO pricing plan
- Other sales and BOGO options



Benefits of BOGO sales

- Gets more people in your store.
- Provides upsell opportunities.
- Helps stimulate new customer acquisition.
- Often increases average ticket sale price.
- Gives your store a competitive edge.

“Everyone loves a bargain”

BOGO

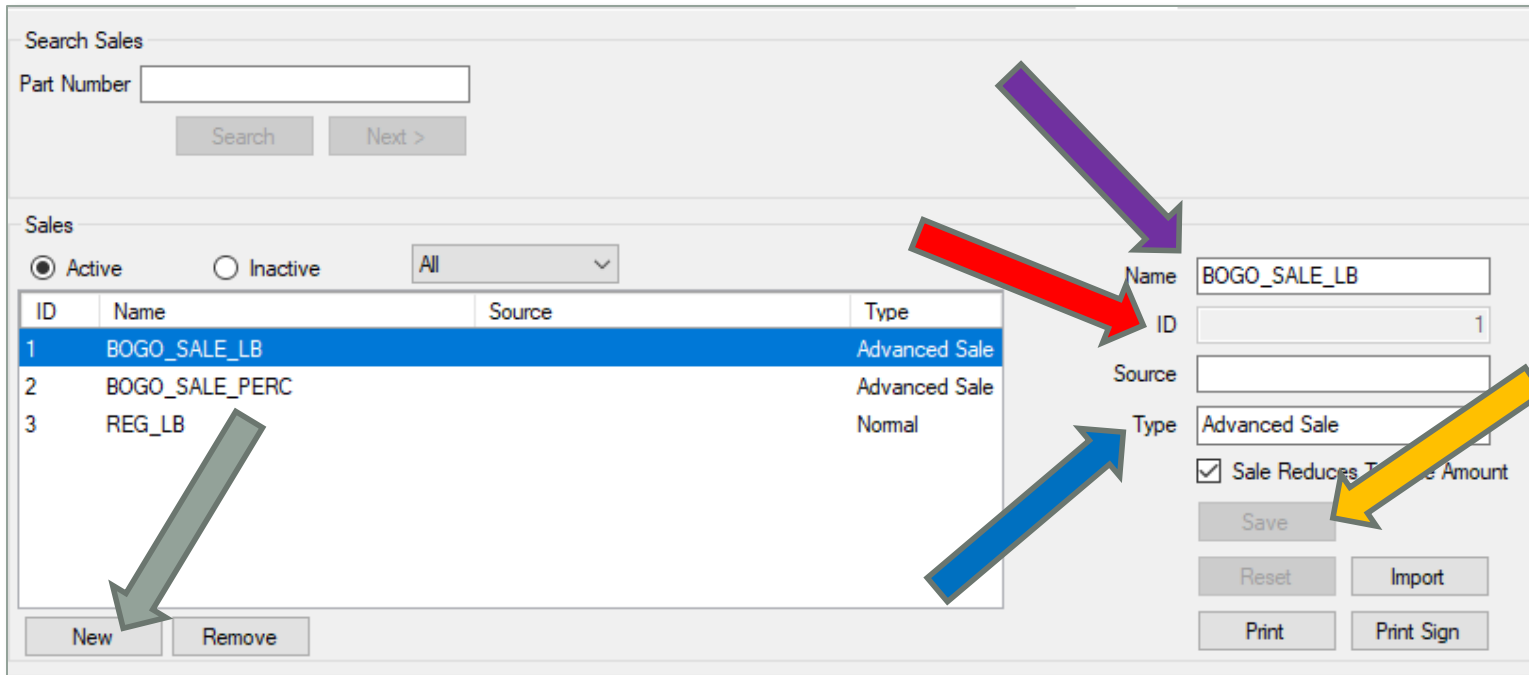
BUY ONE, GET ONE

1/2 OFF

How does a BOGO sale work?

- Offering your customers, a buy one item then get a second one at a percentage or dollar amount discount, can improve your profit margins by increasing the quantity sold.
- For example, a BOGO of Buy One, Get One at 50% offers you the ability to sell more products, which increases your GMROI by increasing your turns, plus customers often purchase blind items, which can increase your average sale price leading to higher profit margin.

How to set up a BOGO in Paladin – Sale List (Step 1)



The screenshot shows the 'Sales' setup window in Paladin. It includes a search bar at the top, a table of existing sales, and a form for creating a new one. Colored arrows point to the 'New' button, the 'Name' field, the 'ID' field, the 'Type' dropdown, and the 'Save' button.

Search Sales
Part Number
Search Next >

Sales
 Active Inactive All

ID	Name	Source	Type
1	BOGO_SALE_LB		Advanced Sale
2	BOGO_SALE_PERC		Advanced Sale
3	REG_LB		Normal

New Remove

Name: BOGO_SALE_LB
ID: 1
Source:
Type: Advanced Sale
 Sale Reduces Total Amount
Save Reset Import
Print Print Sign

Go to **File>Setup>Sale List**

Add new sale list: Click **New**

Enter sale list **Name**

Enter sale list **ID**

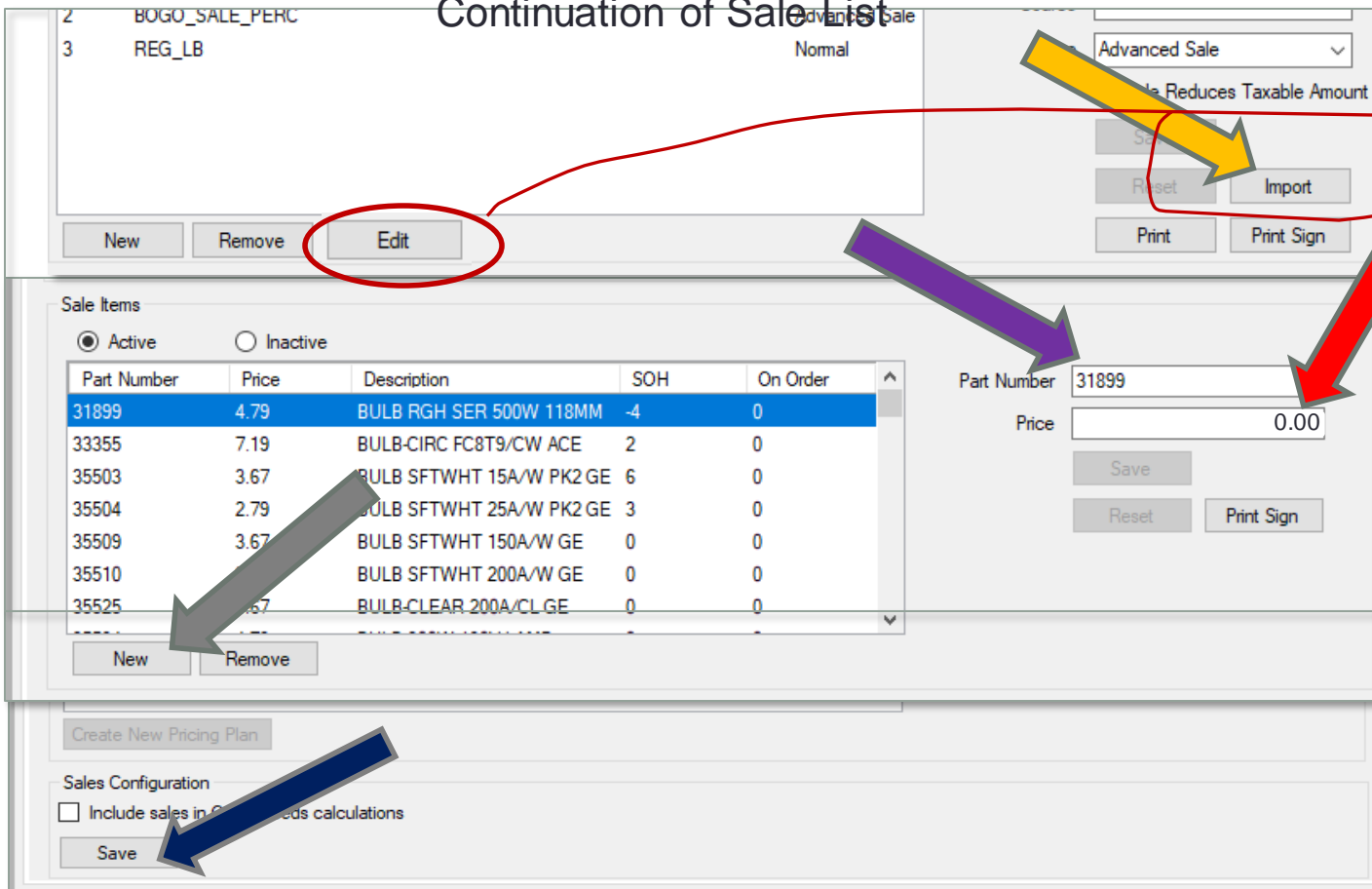
(Use autofill ID number or Pick any unused ID number)

Select **Advanced Sale** for **Type**

Click **Save**

How to set up a BOGO in Paladin – Sale List (Step 2)

Continuation of Sale List



Advanced Sale

Normal

Advanced Sale

Reduces Taxable Amount

Import

Print

Print Sign

New Remove **Edit**

Sale Items

Active Inactive

Part Number	Price	Description	SOH	On Order
31899	4.79	BULB RGH SER 500W 118MM	-4	0
33355	7.19	BULB-CIRC FC8T9/CW ACE	2	0
35503	3.67	BULB SFTWHT 15A/W PK2 GE	6	0
35504	2.79	BULB SFTWHT 25A/W PK2 GE	3	0
35509	3.67	BULB SFTWHT 150A/W GE	0	0
35510		BULB SFTWHT 200A/W GE	0	0
35525	6.67	BULB-CLEAR 200A/CL GE	0	0

Part Number 31899

Price 0.00

Save

Reset

Print Sign

New Remove

Create New Pricing Plan

Sales Configuration

Include sales in ... calculations

Save

Add your sale items using one of these two options:

- **Import**
Create a MS Excel file with two columns including **PartNumber** and **Price**. (Must press Edit to activate the Import feature)

- **One by one**

Add new sale item: Click **New**

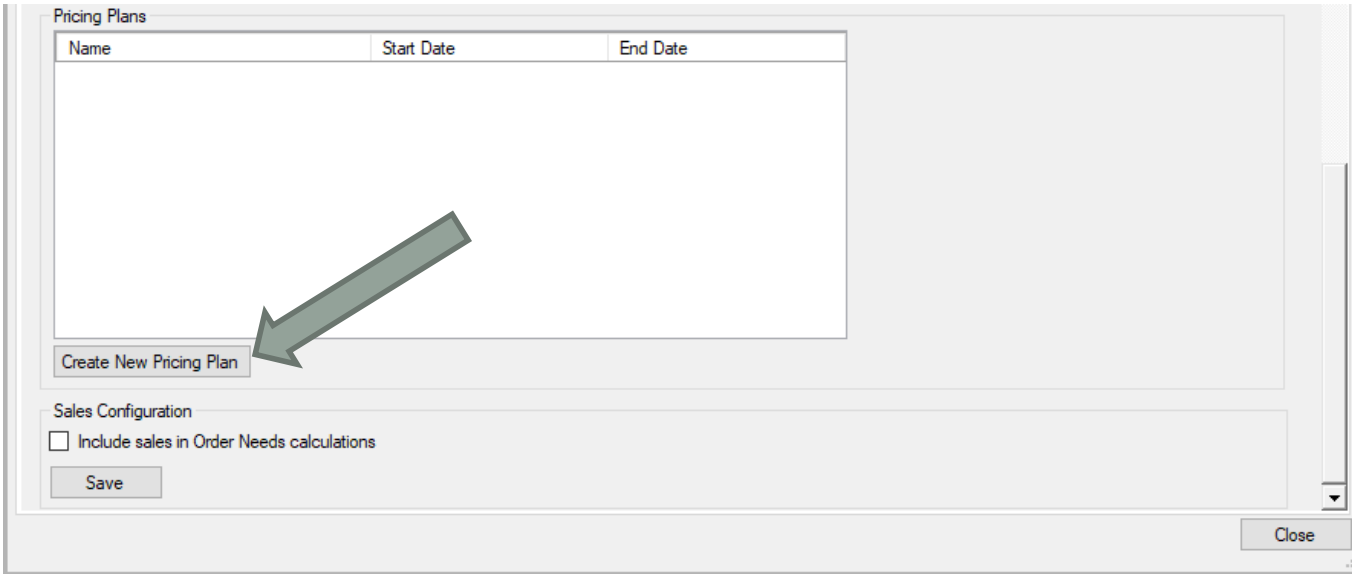
Enter **Part Number**

Enter **Price**

(For BOGO sales enter a price of zero "0")

Click **Save**

How to set up a BOGO in Paladin – Sale List (Step 3)



Pricing Plans

Name	Start Date	End Date
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Create New Pricing Plan

Sales Configuration

Include sales in Order Needs calculations

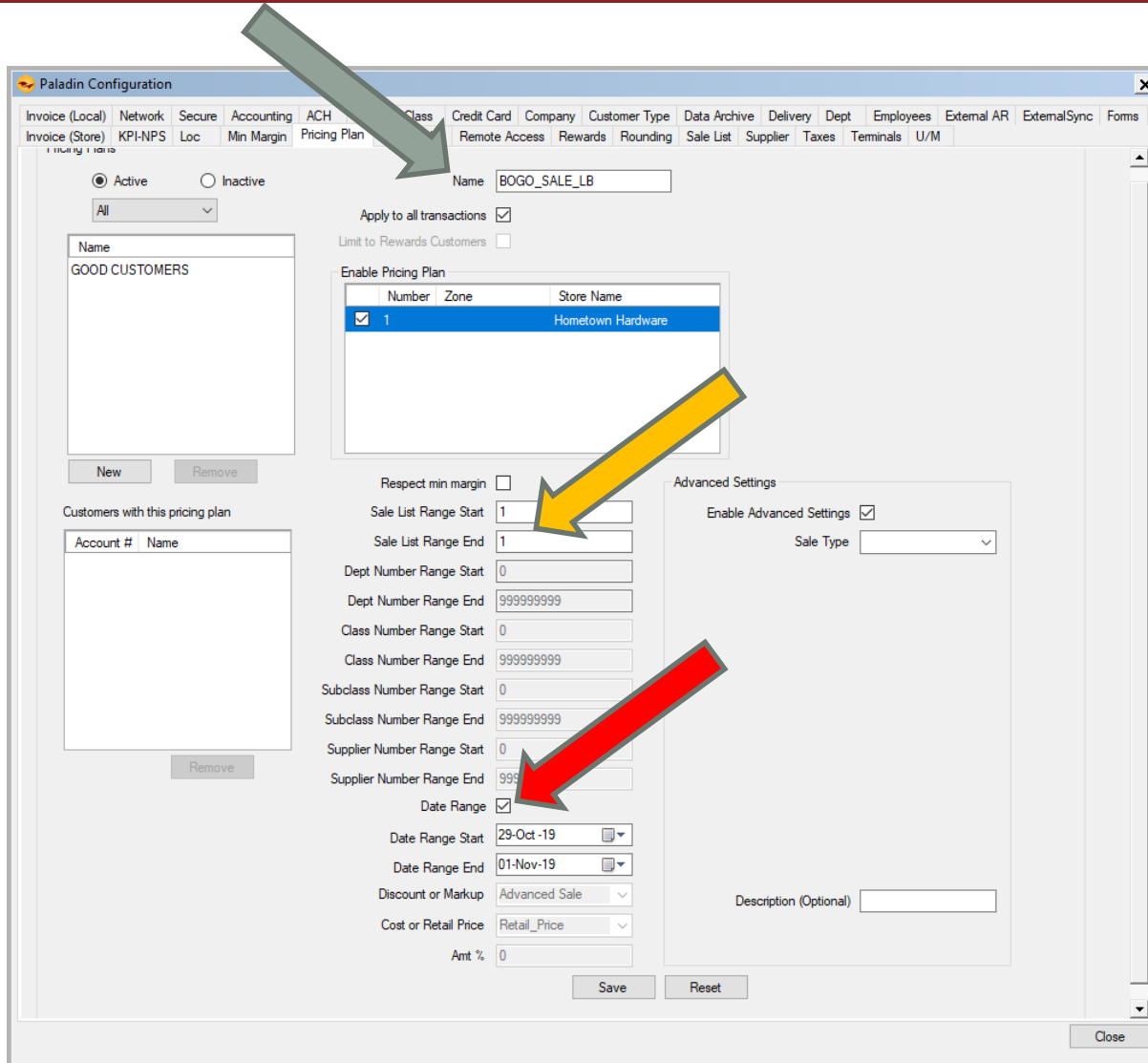
Save

Close

Proceed to the bottom of sale list

Click **Save**

Select **Create New Pricing Plan**



Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Class Credit Card Company Customer Type Data Archive Delivery Dept Employees External AR ExternalSync Foms
Invoice (Store) KPI-NPS Loc Min Margin Pricing Plan Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M

Active Inactive
All

Name: BOGO_SALE_LB

Apply to all transactions
Limit to Rewards Customers

Enable Pricing Plan

Number	Zone	Store Name
<input checked="" type="checkbox"/> 1		Hometown Hardware

Respect min margin

Sale List Range Start: 1
Sale List Range End: 1

Dept Number Range Start: 0
Dept Number Range End: 999999999

Class Number Range Start: 0
Class Number Range End: 999999999

Subclass Number Range Start: 0
Subclass Number Range End: 999999999

Supplier Number Range Start: 0
Supplier Number Range End: 999

Date Range
Date Range Start: 29-Oct-19
Date Range End: 01-Nov-19

Discount or Markup: Advanced Sale
Cost or Retail Price: Retail_Price
Amt %: 0

Advanced Settings
Enable Advanced Settings
Sale Type:
Description (Optional):

Save Reset Close

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

Enter Name.

Sale ID range will be added automatically.

(if not, Add Sale ID of the Sale List previously added)

Optional: Set **Date Range** of sale.
(beginning and ending dates)

How to set up a BOGO 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 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.

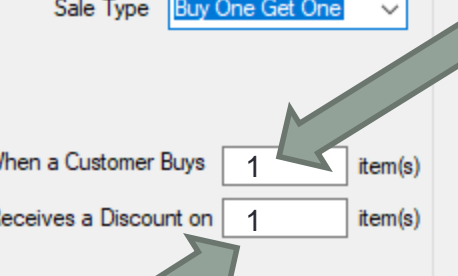
Advanced Settings

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 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**

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)

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

Select Max Qty of Items Discounted

How to set up a BOGO 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

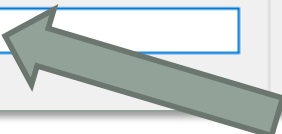
Sale Type

When a Customer Buys item(s)

The Customer Receives a Discount on item(s)

Discount Type

Sale Limitations

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 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)

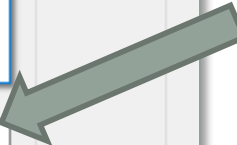
The Customer Receives a Discount on item(s)

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 NOV 2019 01 01-Nov-19

Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone
 Credit Address 1 City/State/Zip Fax

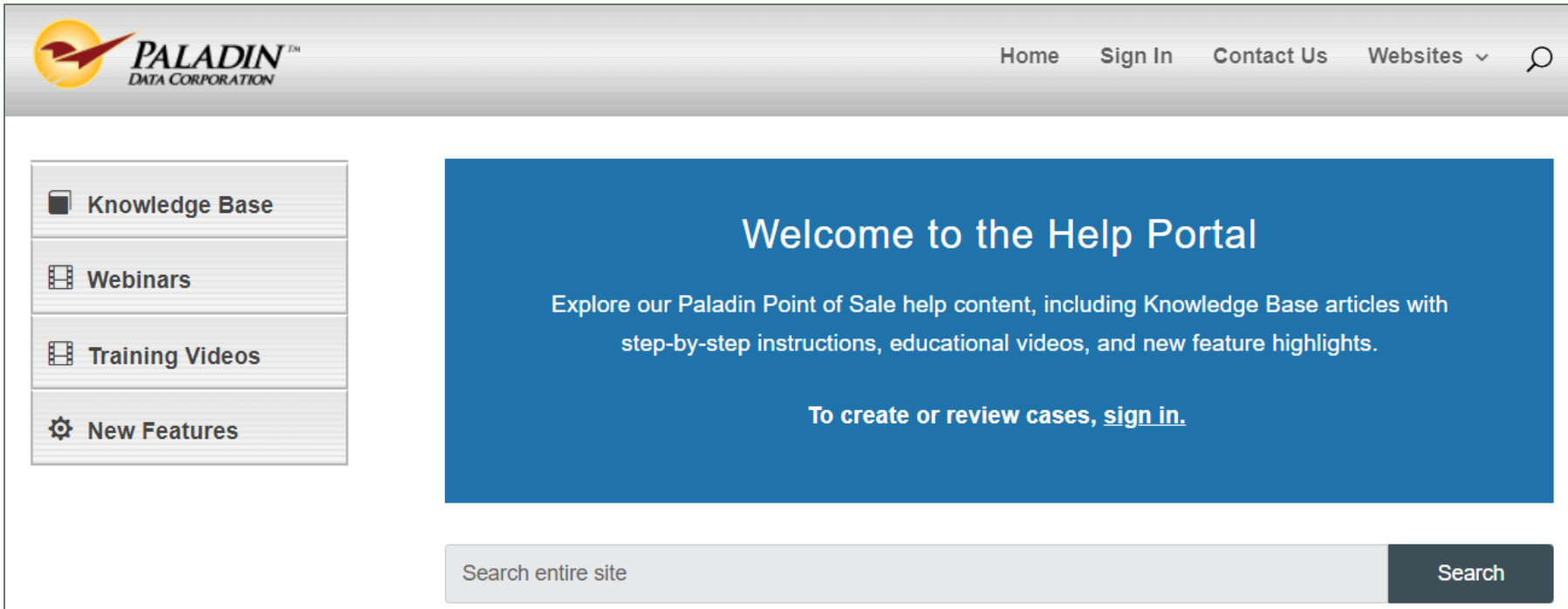
Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31899	BULB RGH SER 500W 118MM	2	\$ 5.99	\$ 11.98
			1				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31899	5.99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

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

Where to find more information

<http://portal.paladinpos.com>

- Detailed written instructions are available on the Paladin Knowledge Base.
 - Knowledge Base article (KBA) instructions
 - Webinar presentations



The screenshot shows the Paladin Knowledge Base Help Portal. The header features the Paladin Data Corporation logo on the left and navigation links for Home, Sign In, Contact Us, and Websites on the right. A search icon is also present. The main content area is divided into two sections. On the left, there is a vertical menu with four items: Knowledge Base (with a document icon), Webinars (with a filmstrip icon), Training Videos (with a filmstrip icon), and New Features (with a gear icon). The right section is a large blue banner with the text "Welcome to the Help Portal" and "Explore our Paladin Point of Sale help content, including Knowledge Base articles with step-by-step instructions, educational videos, and new feature highlights." Below this banner, there is a link that says "To create or review cases, [sign in.](#)". At the bottom of the page, there is a search bar with the placeholder text "Search entire site" and a "Search" button.



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