



Getting to Know Your Business Better with our Comparative Revenue Report

Charles Owen

Chief Experience Officer

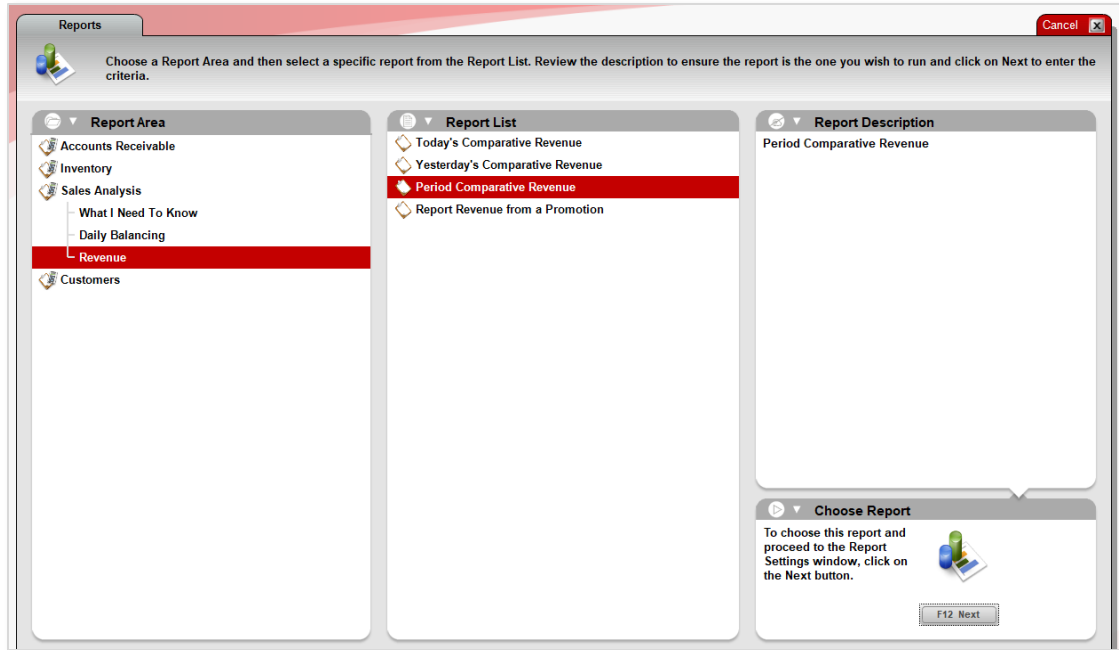
April 4, 2023

WHAT YOU'LL LEARN

- Generating a comparative revenue report.
- Comparative revenue report overview and breakdown.
- Producing comparative revenue results by detail.
- Revenue tax reporting.
- Mapping comparative revenue report to the general ledger summary.
- Comparative revenue report Excel export option.
- Grouping departments on comparative revenue report – Excel option.

Generating a comparative revenue report

Generating the comparative revenue report

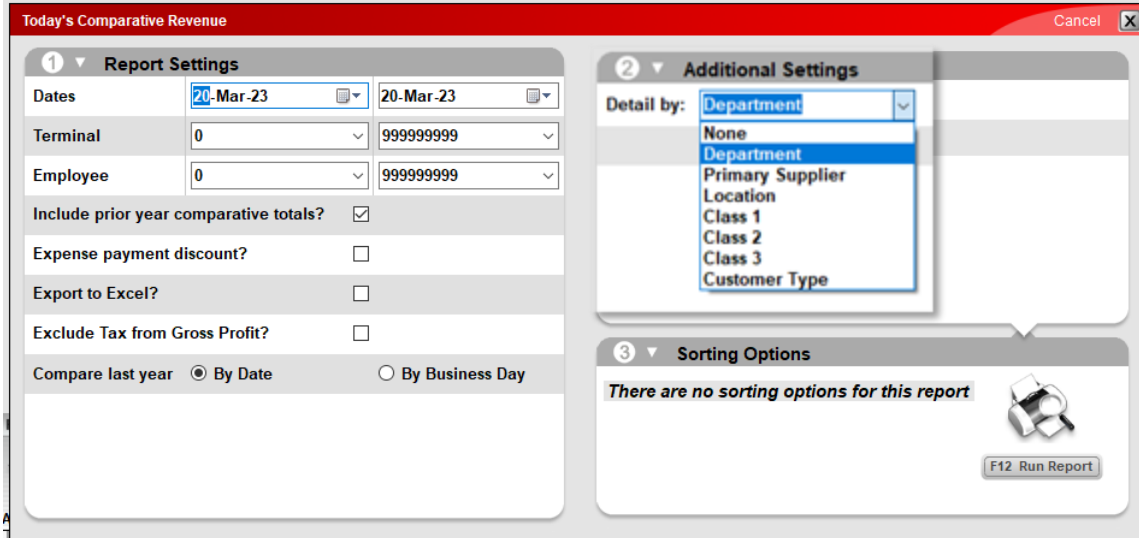


1. In Paladin, on the top ribbon, select the **Reports** module.
2. In the **Report Area** pane, select **Sales Analysis > Revenue**.
3. In the **Report List** pane, click **Period Comparative Revenue**.

Report options:

- **Today's Comparative Revenue**
 - **Yesterday's Comparative Revenue**
 - **Report Revenue from a Promotion**
4. In the **Choose Report** pane, click **F12 Next**.

Generating a comparative revenue report (cont'd)



The screenshot shows the 'Today's Comparative Revenue' window with the following settings:

- Report Settings:**
 - Dates: 20-Mar-23 to 20-Mar-23
 - Terminal: 0 to 999999999
 - Employee: 0 to 999999999
 - Include prior year comparative totals? ☒
 - Expense payment discount? ☐
 - Export to Excel? ☐
 - Exclude Tax from Gross Profit? ☐
 - Compare last year: ☒ By Date, ☐ By Business Day
- Additional Settings:**
 - Detail by: Department (dropdown menu is open showing options: None, Department, Primary Supplier, Location, Class 1, Class 2, Class 3, Customer Type)
- Sorting Options:**
 - There are no sorting options for this report

Buttons: Cancel, F12 Run Report

5. In the **Period Comparative Revenue** window, in the **Report Settings** pane, enter the criteria: By **Date**, **Terminal**, or **Employee** range.
6. Other report settings:
 - ☐ Include prior year comparison totals
 - ☐ Expense payment discount
 - ☐ Export to Excel
 - ☐ Exclude Tax from Gross Profit
 - ☐ Compare last year by Date or Business Day?
7. In the **Additional Settings** pane, in the **Detail by** list, select an option from the dropdown.
 - Department (default)
 - Primary Supplier
 - Location
 - Class (1,2, or 3)
 - Customer type
8. To generate the report, select **F12 Run Report**.

Comparative revenue report overview

Store Name

PERIOD COMPARATIVE REVENUE

PAGE 1

SELECTION

REVENUE

AMOUNT

EMPLOYEE

0

00000000

TERMINAL

0

00000000

THIS PERIOD

SEARCH BEGIN

Sunday 01-Jan-23

SEARCH END

Monday 02-Jan-23

LAST YEAR

SEARCH BEGIN

Saturday 01-Jan-22

SEARCH END

Sunday 02-Jan-22

BTLR STOP

RAN ON

27-Mar-23

AT

12:10

UNPP 1

SHOW PRIOR YEAR COMPARATIVE TOTALS?

X

DETAIL BY DEPARTMENT?

X

REVENUE SOURCES

	THIS PERIOD				LAST YEAR			
SOURCE	REVENUE	% OF	# OF		REVENUE	% OF	# OF	
	AMOUNT	SALES	INV		AMOUNT	SALES	INV	
CASH	776.66	19.1%	128		795.35	23.8%	95	
CHARGE	724.57	17.8%	15		93.10	2.8%	7	
CHG CARD	2558.50	63.0%	100		2454.41	73.4%	85	
CHECK	0.00	0.0%	0		0.00	0.0%	0	
NET \$	4059.73	100%			3342.86	100%		
GROSS \$	+4199.31				+3362.73			
CUSTOMER COUNT			195				146	

CASH SOURCES

	THIS PERIOD				LAST YEAR			
SOURCE	CASH	% OF			CASH	% OF		
	AMOUNT	CASH			AMOUNT	CASH		
CASH	776.66	23.3%			795.35	23.2%		
CHG CARD	2558.50	76.7%			2625.53	76.8%		
CHECK	0.00	0.0%			0.00	0.0%		
PAID OUT	0.00				0.00			
CASHDROP	0.00				0.00			
TOTAL	3335.16	100%			3420.88	100%		
RDA	0.00				0.00			

	THIS PERIOD				LAST YEAR					
LINE #	DEPT ID	DEPT NAME	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN
1	10	HAND TOOLS	3	17.13	34.95	51.0%	3	8.56	19.47	56.0%
2	14	PAINT AND PAINT	35	158.64	313.75	49.4%	28	98.11	182.89	46.4%
3	15	POWER TOOLS & AC	6	78.51	113.49	30.8%	3	327.78	441.19	25.7%
4	20	FASTENERS	15	105.77	194.99	45.8%	5	22.88	41.33	44.6%
5	25	HARDWARE	4	25.69	43.96	41.6%	1	6.24	15.96	60.9%
6	30	PAINT & SUNDRIES	5	35.07	73.69	52.4%	8	34.87	83.50	58.2%
7	34	ELECTRICAL SUPPL	17	72.56	144.28	49.7%	19	53.27	112.92	52.8%
8	35	ELECTRICAL	1	0.80	1.99	59.8%	3	9.30	21.74	57.2%
9	40	PLUMBING	90	593.66	908.66	34.7%	43	311.28	750.63	58.5%
10	46	HEATING AND COOL	7	42.38	78.23	45.8%	5	26.29	51.53	49.0%

Store Name

PERIOD COMPARATIVE REVENUE

27-Mar-23 12:10 BY UNPP 1

PAGE 2

	THIS PERIOD				LAST YEAR					
LINE #	DEPT ID	DEPT NAME	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN
11	50	HOUSEWARES	40	284.21	548.74	48.2%	16	91.64	170.32	46.2%
12	55	LAWN & GARDEN	1	0.17	1.00	83.0%	4	9.39	18.94	50.4%
13	56	FASTENERS	15	160.08	319.32	49.9%	6	59.22	116.59	49.2%
14	58	PET & WILD BIRD	4	106.98	174.76	38.8%	0	0.00	0.00	0.0%
15	60	APPLIANCES AND H	1	8.76	14.99	41.6%	0	0.00	0.00	0.0%
16	64	HOUSEWARES AND G	6	24.49	44.96	45.5%	5	158.02	287.74	45.1%
17	68	OUTDOOR LIVING &	0	0.00	0.00	0.0%	1	10.00	16.99	41.1%
18	70	SPORTING GOODS	15	117.41	192.64	39.1%	16	72.73	147.43	50.7%
19	76	DOLLAR CENTRAL	3	17.64	31.57	44.1%	0	0.00	0.00	0.0%
20	80	SPORTING GOODS	7	141.93	218.91	35.2%	6	144.72	199.42	27.4%
21	84	AUTOMOTIVE	6	16.16	34.00	52.5%	3	8.83	18.47	52.2%
22	88	MISC SALES	1	0.76	1.99	61.8%	1	3.13	4.99	37.3%
23	90	STATIONARY SUPPL	2	5.89	8.09	27.2%	0	0.00	0.00	0.0%
24	94	NOTIONS AND MISC	3	5.47	7.90	30.8%	4	16.30	23.54	30.8%
25	95	Propane	1	73.79	170.14	56.6%	1	176.00	307.14	42.7%
26		TAX			382.73				310.13	
TOTALS			288	2093.94	4059.73	43.1%	181	1648.55	3342.86	45.6%
GROSS PROFIT					1965.79				1694.31	

SALES TAX DETAIL

	THIS PERIOD	THIS PERIOD	THIS PERIOD
	TAX APPLIED	TAXABLE SALES	EXEMPT SALES
STATE 1	State Tax	382.73	3663.13
	Total State Tax	382.73	3663.13
	TOTAL SALES TAX	382.73	

Comparative revenue report overview and breakdown

Store Name

PERIOD COMPARATIVE REVENUE

PAGE 1

SELECTION	BEGINNING	ENDING
EMPLOYEE	0	999999999
TERMINAL	0	999999999
SHOW PRIOR YEAR COMPARATIVE TOTALS? X		
DETAIL BY DEPARTMENT? X		

THIS PERIOD	
SEARCH BETWN	
Sunday	01-Jan-23
Saturday	07-Jan-23

LAST YEAR	
SEARCH BETWN	
Saturday	01-Jan-22
Friday	07-Jan-22

DATE STAMP
RAN ON 22-Mar-23
AT 07:25
EMP# 1

REVENUE SOURCES

SOURCE	THIS PERIOD			LAST YEAR		
	REVENUE AMOUNT	% OF SALES	# OF INV	REVENUE AMOUNT	% OF SALES	# OF INV
CASH	4949.07	17.7%	593	4684.05	20.0%	532
CHARGE	6673.38	23.9%	129	5133.19	21.9%	133
CHG CARD	16283.53	58.4%	526	13634.41	58.1%	459
CHECK	0.00	0.0%	0	0.00	0.0%	0
NET \$	27905.98	100%		23451.65	100%	
GROSS \$	+28186.19	-280.21		+23594.18	-142.53	
CUSTOMER COUNT	1030			931		

CASH SOURCES

SOURCE	THIS PERIOD		LAST YEAR	
	CASH AMOUNT	% OF CASH	CASH AMOUNT	% OF CASH
CASH	4955.69	22.5%	5025.37	22.0%
CHG CARD	16639.36	75.6%	16697.33	73.0%
CHECK	412.75	1.9%	1147.63	5.0%
PAID OUT	0.00		0.00	
CASHDROP	0.00		0.00	
TOTAL	22007.80	100%	22870.33	100%
ROA	775.20	DSCNT	0.00	

Revenue sources breakdown

REVENUE SOURCES						
SOURCE	THIS PERIOD			LAST YEAR		
	REVENUE AMOUNT	% OF SALES	# OF INV	REVENUE AMOUNT	% OF SALES	# OF INV
CASH	4949.07	17.7%	593	4684.05	20.0%	532
CHARGE	6673.38	23.9%	129	5133.19	21.9%	133
CHG CARD	16283.53	58.4%	526	13634.41	58.1%	459
CHECK	0.00	0.0%	0	0.00	0.0%	0
NET \$	27905.98	100%		23451.65	100%	
GROSS \$	+28186.19		-280.21	+23594.18		-142.53
CUSTOMER COUNT		1030			931	

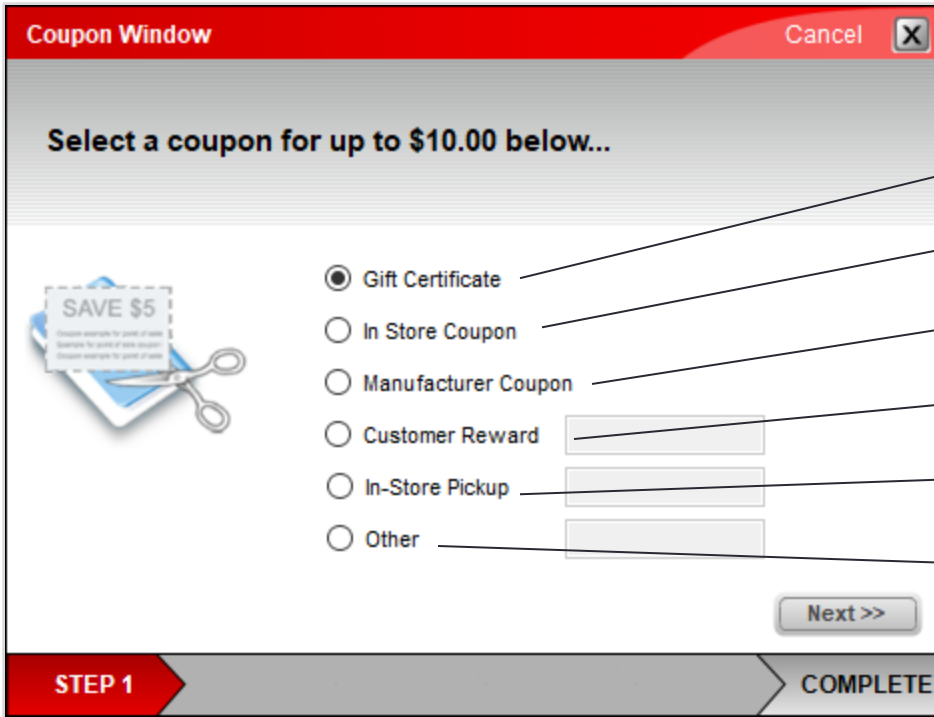
Revenue sources include:

- CASH: Includes cash collected for all products and services, excluding ROA's.
- CHARGE: Includes account charges for all products and services, excluding ROA's.
- CHG CARD: Includes debit and credit cards as well as gift card transactions.
- CHECK: Includes checks received for all products and services, excluding ROA's.

Net = Gross – Returns

Customer Count = # of Completed Transactions

Coupon revenue sources breakdown



Other revenue sources include:

- GIFT CPN: Gift Certificate
- STOR CPN: In Store Coupon
- MFG CPN: Manufacturer Coupon
- RICH RWD: Rich Rewards Coupon
- WEBSTORE: In-Store Pickup
- OTHR CPN: Other Coupons
- IMPORT: Imported Invoices

Cash sources breakdown

CASH SOURCES				
SOURCE	THIS PERIOD		LAST YEAR	
	CASH AMOUNT	% OF CASH	CASH AMOUNT	% OF CASH
CASH	4955.69	22.5%	5025.37	22.0%
CHG CARD	16639.36	75.6%	16697.33	73.0%
CHECK	412.75	1.9%	1147.63	5.0%
PAID OUT	0.00		0.00	
CASHDROP	0.00		0.00	
TOTAL	22007.80	100%	22870.33	100%
ROA	775.20	DSCNT	0.00	

Cash sources include:

- CASH: Includes all cash collected, including ROA's.
- CHG CARD: Includes debit and credit cards as well as gift card transactions.
- CHECK: Includes all check amounts received, including ROA's.
- PAID OUT: Includes the total of paid-in and paid-out transactions made to/from the cash drawer(s).
- CASHDROP: Includes the total of cash drops made from the cash drawer(s).
- ROA/DSCNT: Includes the total ROA's and ROA discounts applied to payments.

Comparative revenue detail breakdown

2 Additional Settings

Detail by: Department

- None
- Department**
- Primary Supplier
- Location
- Class 1
- Class 2
- Class 3
- Customer Type

LINE #	DEPT ID	DEPT NAME	THIS PERIOD				LAST YEAR			
			NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN	NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN
1	10	HAND TOOLS	27	153.69	272.41	43.6%	27	133.93	262.05	48.9%
2	14	PAINT AND PAINT	164	1216.76	2272.34	46.5%	151	1119.94	2004.06	44.1%
3	15	POWER TOOLS & AC	25	1560.49	2070.56	24.6%	19	1147.09	1544.92	25.8%
4	20	FASTENERS	109	779.30	1513.50	48.5%	94	631.85	1238.51	49.0%
5	25	HARDWARE	11	155.69	275.57	43.5%	4	26.63	47.84	44.3%
6	28	POWER TOOLS	3	64.40	100.97	36.2%	6	92.44	151.94	39.2%
	30	PAINT & SUNDRIES	47	601.67	1093.04	45.0%	42	311.99	633.80	50.8%
	34	ELECTRICAL SUPPL	109	662.79	1279.03	48.2%	91	406.41	784.70	48.2%
	35	ELECTRICAL	6	1.46	26.27	94.4%	5	13.70	35.17	61.0%
	40	PLUMBING	315	2049.72	3697.73	44.6%	242	1402.63	2885.20	51.4%
	46	HEATING AND COOL	27	457.63	782.70	41.5%	25	263.93	471.84	44.1%
	50	HOUSEWARES	149	1435.35	2616.65	45.1%	137	1078.61	2092.49	48.5%
	55	LAWN & GARDEN	17	195.54	345.52	43.4%	18	518.45	733.16	29.3%
	56	FASTENERS	45	624.52	1242.40	49.7%	40	435.46	871.71	50.0%
	58	PET & WILD BIRD	7	261.98	414.47	36.8%	5	216.66	337.98	35.9%
	60	APPLIANCES AND H	2	37.75	60.98	38.1%	4	17.10	38.02	55.0%
	62	FARM & RANCH	4	93.47	121.95	23.4%	5	148.69	202.78	26.7%
	64	HOUSEWARES AND G	24	387.03	656.66	41.1%	18	340.47	609.05	44.1%
	68	OUTDOOR LIVING &	0	0.00	0.00	0.0%	2	17.46	33.98	48.6%
	70	SPORTING GOODS	110	1927.09	2959.78	34.9%	74	1265.96	2012.44	37.1%
	76	DOLLAR CENTRAL	9	213.30	360.95	40.9%	13	249.05	441.16	43.5%
22	80	SPORTING GOODS	15	520.55	809.09	35.7%	13	938.57	1306.28	28.1%
23	84	AUTOMOTIVE	25	111.18	204.07	45.5%	27	229.39	399.77	42.6%
24	88	MISC SALES	6	78.21	138.90	43.7%	3	33.14	56.95	41.8%
25	90	STATIONARY SUPPL	4	15.00	24.16	37.9%	3	32.57	53.87	39.5%
26	94	NOTIONS AND MISC	31	129.08	204.82	37.0%	10	128.96	184.43	30.1%
27	95	Propane	1	696.61	1593.95	56.3%	1	1064.00	1856.76	42.7%
28	998	Labor	2	70.05	268.40	73.9%	1	15.00	15.00	0.0%
29		TAX			2499.11				2145.79	
TOTALS			1294	14500.31	27905.98	42.9%	1080	12280.05	23451.65	42.4%
GROSS PROFIT				13405.67				11171.60		

Comparative revenue report tax breakdown

		SALES TAX DETAIL		
STATE		THIS PERIOD	THIS PERIOD	THIS PERIOD
		TAX APPLIED	TAXABLE SALES	EXEMPT SALES
1	Tax exempt Accounts	0.00	0.00	710.18
2	State Tax	2499.11	23917.50	709.21
3	resale	0.00	0.00	30.98
4	INVOICE NON-TAXED	0.00	0.00	39.00
	Total State Tax	2499.11	23917.50	1489.37
	TOTAL SALES TAX	2499.11		

Comparative revenue report tax breakdown (cont'd)

- To calculate the taxable amount, refer to the TAX APPLIED section.
- If the **tax applied** amount is X, and the **sales tax** percentage is Y, the taxable amount will be X divided by Y.
- Example: \$11,401.44 (tax applied) divided by 0.1045 (sales tax percentage) equals \$109,100.47 (taxable amount).
- **Note:** Item rounding may cause slight variances

STATE		SALES TAX DETAIL		
		THIS PERIOD	THIS PERIOD	THIS PERIOD
		TAX APPLIED	TAXABLE SALES	EXEMPT SALES
1	Tax exempt Accounts	0.00	0.00	2318.25
2	State Tax	11401.44	109116.09	2877.93

Paladin POS Data Viewer

IME | Instant Savings | Inventory | Invoices | Invoice Import | InvoiceItem Taxes | ISPU | KPI | Log | Margin Master | Market Data | Mobile Utils

PricingPlan Merge | Purchase Orders | Rewards | Sales Hist | Settings | Tools

AceAPI | Ace Sales Tester | ACH Processing | ACH Review | Customer A/R | Customers | Customer Merge | Data Archive | Discounts | EDI | GL Summary

Date Range: Wednesday, March 1, 2023 to: Tuesday, March 28, 2023

Get Data

☐ Show by Department
☐ Include \$0 Amounts in Export
☐ Include Details

Export

Tab Delimited

Totals Balance

GL_AccountNumber	AccountDescription	DR	CR
	Cash	8,410.74	
	Charge Card	26,777.69	
	Check	1,207.01	
	External Charge		
	Paid Out		5.00
	Coupons Redeemed	178.36	
	Paid Out Exp Act	5.00	
	Revenue		48,542.99
	Accounts Receivable	12,762.47	
	Accounts Receivable		793.28
	COGS Inventory	26,543.01	
	Inventory Asset		26,543.01
	Tax Expense Act	4,519.06	
	Tax A/P Liability Act		4,519.06
	ROA Discounts - Expense	4.50	
	ROA Discounts - Asset		4.50
	Inventory Asset - Received	9,825.84	
	Inventory Purchased		9,825.84
	Inventory Shrinkage		10,292.44
	Inventory Asset - Shrinkage	10,292.44	
	Inventory Defective	15.18	
	Inventory Asset - Defective		15.18
	Coupons Issued - Expense	105.00	
	Coupons Issued - Asset		105.00
	Total	100,646.30	100,646.30

OK

Generating general ledger data

To generate the GL Summary report:

1. In Paladin, on the top ribbon, select the **Maintain -> Data Viewer -> GL Summary** module.
2. Set the report date starting and ending period and click on the **Get Data** button.

Paladin General Ledger Export File				Period Comparative Revenue Report			
GL Summary tab of the Paladin Configuration window				THIS PERIOD			
		REVENUE SOURCES		CASH SOURCES			
GL AccountNumber	AccountDescription	DR	CR	Source	Revenue Amount	Source	Cash Amount
sample#123-44444	Cash	42,547.86		CASH	40905.74	CASH	42547.86
sample#123-44444	Charge Card	85,425.10		CHARGE	16645.27	CHARGE	85425.10
sample#123-44444	Check	17,781.84		CHG CARD	84651.46	CHECK	17781.84
sample#123-44444	External Charge			CHECK	3949.51	EXT CHRG	0.00
sample#123-44445	Paid Out		382.94	EXT CHRG	0.00	PAID OUT	382.94
sample#123-44446	Coupons Redeemed	354.00		INST SAV	60.00	CASHDROP	0.00
sample#123-44447	Paid Out Exp Act	382.94		GIFT CPN	294.00		
sample#123-44448	Revenue		146,505.98	STOR CPN	0.00		
sample#123-44449	Accounts Receivable	16,645.27		NET \$	146505.98	TOTAL	145371.86
sample#123-44450	Accounts Receivable		16,248.09	GROSS \$	149831.08	ROA	16248.09
sample#123-44451	COGS Inventory	73,052.22		LINE # DEPT ID DEPT NAME		DSCNT	0.00
sample#123-44452	Inventory Asset		73,052.22	# (blank) TAX			
sample#123-44453	Tax Expense Act	8,848.04				SALES COST	REVENUE
sample#123-44454	Tax A/P Liability Act		8,848.04			(blank)	(blank)
sample#123-44455	ROA Discounts - Expense						
sample#123-44456	ROA Discounts - Asset						
sample#123-44457	Inventory Asset - Received	139,151.61		TOTALS	73052.22		146505.98
sample#123-44458	Inventory Purchased		139,151.61	GROSS PROFIT			73453.76
sample#123-44459	Inventory Shrinkage						
sample#123-44460	Inventory Asset - Shrinkage						
sample#123-44461	Inventory Defective						
sample#123-44462	Inventory Asset - Defective						
	Total	38					

Comparative revenue report and general ledger mapping

- 4** → This number represents the total external charges for the given date period. Example: Paladin's integration with BlueTarp.
Note: Although external charges were included in this mapping example, they are not included on the prior **Period Comparative Revenue** reports' screenshots.
- 13** → This number represents the total cost of the products received for the given date period. The **Received Report** will match this number for the given date period.
- 14** → This number represents the total loss of inventory items for the given date period. The **Shrinkage Report** will match this number by running the report of all shrinkage greater than zero and then less than zero and subtracting the latter from the former.
- 15** → This number represents the total defective items for the given date period. Users are able to generate a **Defective Parts** report, but selecting a date range when running the report is not an option. Depending on your store practice for clearing defective items, the numbers from the report may or may not match up. However, a custom SQL query may be run in order to extract this number based on a specified date range.

Comparative revenue report – Excel export report option

There is an option that causes the comparative revenue report to export a row for every active department in your store, even if there's no data for that time period. This option will create the same number of lines each time you run the report allowing for consistency when using this data with other management or reporting systems.

DEPT ID	DEPT NAME	This Period					Last Year			
		NUMBER OF ITEMS	SALES COST	REVENUE	MARGIN		NUMBER OF ITEMS	LAST YEAR SALES COST	REVENUE	MARGIN
7	balance transfer	0	0.00	0.00	0.0%		0	0.00	0.00	0.0%
10	HAND TOOLS	27	153.69	272.41	43.6%		27	133.93	262.05	48.9%
14	PAINT AND PAINT	164	1,216.76	2,272.34	46.5%		151	1,119.94	2,004.06	44.1%
15	POWER TOOLS & AC	25	1,560.49	2,070.56	24.6%		19	1,147.09	1,544.92	25.8%
20	FASTENERS	109	779.30	1,513.50	48.5%		94	631.85	1,238.51	49.0%
30000	Cash Discount/Se	0	0.00	0.00	0.0%		0	0.00	0.00	0.0%
	TAX			2,499.11					2,145.79	
Totals		1294	14,500.31	27,905.98	42.9%		1080	12,280.05	23,451.65	42.4%

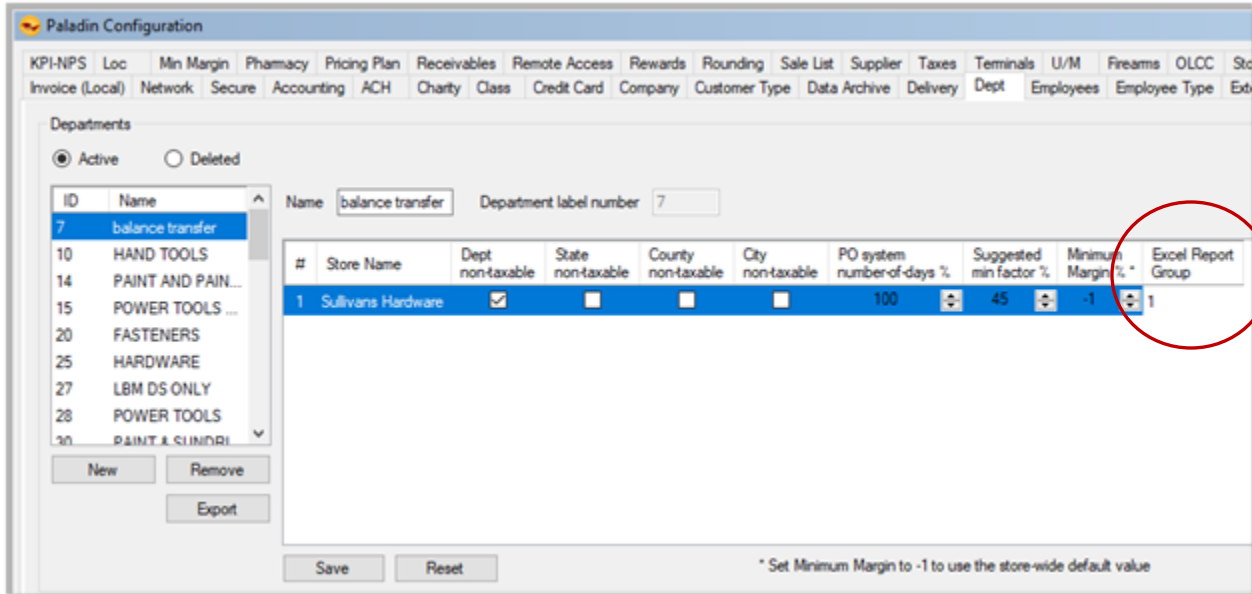
To enable this feature:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. In the **Report Options** pane, check **Show Zero Comparative Revenue Departments in Excel Export**.
4. Click **Save**, then click **Close**.

Note: This feature is limited to Excel output only.

Grouping departments on comparative revenue report – Excel option

When assigning department groups, the Comparative Revenue report (Excel version) will automatically create individual worksheets for those specified groups.



Paladin Configuration

KPI-NPS Loc Min Margin Pharmacy Pricing Plan Receivables Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M Firearms OLCC Stc

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees Employee Type Ext

Departments

☒ Active ☐ Deleted

ID Name

7 balance transfer

10 HAND TOOLS

14 PAINT AND PAIN...

15 POWER TOOLS ...

20 FASTENERS

25 HARDWARE

27 LBM DS ONLY

28 POWER TOOLS

30 PAINT & STUNDR...

New Remove Export

Name balance transfer Department label number 7

#	Store Name	Dept non-taxable	State non-taxable	County non-taxable	City non-taxable	PO system number-of-days %	Suggested min factor %	Minimum Margin % *	Excel Report Group
1	Sullivan's Hardware	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	45	-1	1

Save Reset

* Set Minimum Margin to -1 to use the store-wide default value

1. Decide how you want to group your departments. Each group will need an integer group ID. Integers can be simply 1, 2, 3, etc. You do not have to assign every department to a group.
2. In Paladin, from the main menu, select **File > Setup**.
3. Select the **Dept** tab.
4. To assign a department group ID, select the department, enter the group ID (integer) in the **Excel Report Group** column. Do this for all departments in each group.
5. Click **Save**, then click **Close**.
6. Close and restart Paladin.

Learn More

To learn more, see the following resources in our [Help Portal](#)

- [How to create a Comparative Revenue Report](#)
- [Customer types](#)
- [Taxes](#)
- [General Ledger \(GL\) Summary](#)
- [How to create the Period Comparative Revenue report](#)
- [How to set up department groups for the Comparative Revenue report](#)

A recording of this webinar will be available at portal.paladinpos.com/webinars.



Expand Your Knowledge

Stay relevant in retail:
paladinpointofsale.com/retailsience

Self help at:
portal.paladinpos.com

Webinars available at:
portal.paladinpos.com/webinars

Follow us for Paladin news and updates:

