



Paladin's Import/Export lets You Make Big Changes with Little Effort

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WHAT YOU'LL LEARN

- Importing & exporting capabilities and benefits
- The best toolset for working with data
- Exporting data from Paladin
- Alternative ways to export data from Paladin
- Importing inventory data into Paladin
- Taking precautions when importing data
- Open DataBase Connectivity – ODBC option
- ODBC and Excel working together

Importing & exporting capabilities and benefits



- Custom reporting made easy.
- Can transform your data into column and row format for easy analysis and editing.
- Provides the ability to effect change in mass.
- Quickly update inventory pricing in bulk.
- Easily add supplier catalogs to obscure inventory.
- Import customer data and third-party invoices from other systems, i.e., fuel, webstore, etc.
- Import purchase orders from non-EDI suppliers.

The best toolset for working with data

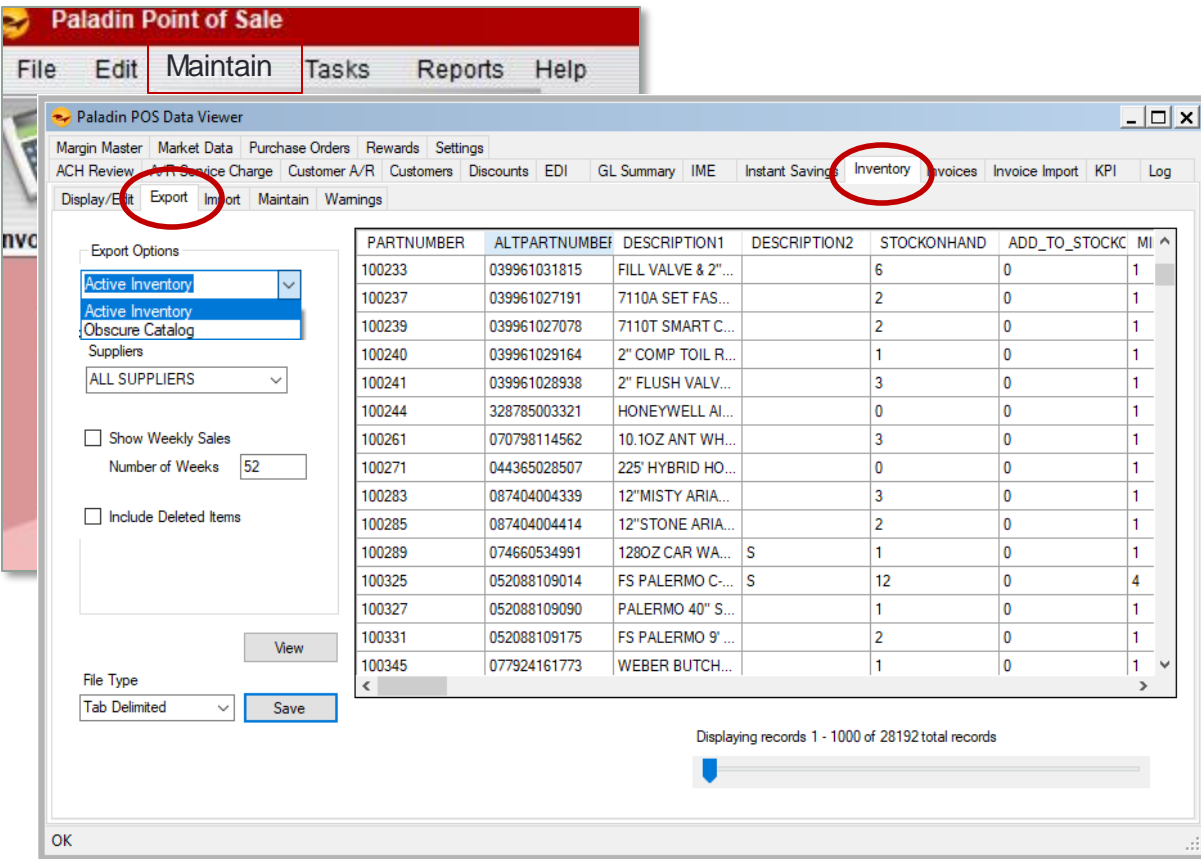


- When exporting Paladin data, Microsoft Excel is the most favorable option.
- Excel is required for most reports in Paladin.
- Microsoft Excel is included in Office 365 subscriptions, which Paladin can install and setup for our customers.
- To determine if Excel is installed on your computer, click the Start button, and then search for Excel.

Process for exporting data from Paladin

In this example we're showing exporting *Inventory* data into Microsoft Excel:

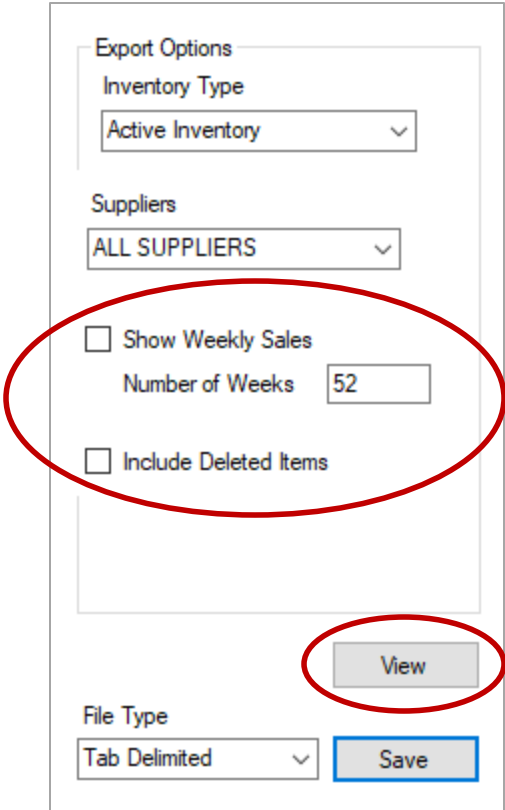
1. Select **Maintain > Data Viewer**.
2. Select the **Inventory** tab, and then select the **Export** tab.
3. In the **Export Options** section, in the **Inventory Type** list, select **Active Inventory** or **Obscure Catalog**.
4. In the **Suppliers** list, select a supplier name or use default **ALL SUPPLIERS**.
5. Optional: Check **Show Weekly Sales**.



The screenshot shows the 'Paladin POS Data Viewer' window. The 'Maintain' menu is open, and the 'Inventory' tab is selected. The 'Export' option is highlighted. The 'Export Options' section is visible, showing 'Active Inventory' selected in the 'Inventory Type' list and 'ALL SUPPLIERS' selected in the 'Suppliers' list. The 'Show Weekly Sales' checkbox is checked, and the 'Number of Weeks' is set to 52. The 'File Type' is set to 'Tab Delimited'. The main data table displays a list of inventory items with columns for PARTNUMBER, ALTPARTNUMBER, DESCRIPTION1, DESCRIPTION2, STOCKONHAND, ADD_TO_STOCK, and MI. The status bar at the bottom indicates 'Displaying records 1 - 1000 of 28192 total records'.

PARTNUMBER	ALTPARTNUMBER	DESCRIPTION1	DESCRIPTION2	STOCKONHAND	ADD_TO_STOCK	MI
100233	039961031815	FILL VALVE & 2"...		6	0	1
100237	039961027191	7110A SET FAS...		2	0	1
100239	039961027078	7110T SMART C...		2	0	1
100240	039961029164	2" COMP TOIL R...		1	0	1
100241	039961028938	2" FLUSH VALV...		3	0	1
100244	328785003321	HONEYWELL AI...		0	0	1
100261	070798114562	10.1OZ ANT WH...		3	0	1
100271	044365028507	225" HYBRID HO...		0	0	1
100283	087404004339	12" MISTY ARIA...		3	0	1
100285	087404004414	12" STONE ARIA...		2	0	1
100289	074660534991	128OZ CAR WA... S		1	0	1
100325	052088109014	FS PALERMO C... S		12	0	4
100327	052088109090	PALERMO 40" S...		1	0	1
100331	052088109175	FS PALERMO 9' ...		2	0	1
100345	077924161773	WEBER BUTCH...		1	0	1

Process for exporting data from Paladin (cont'd)



Export Options

Inventory Type
Active Inventory

Suppliers
ALL SUPPLIERS

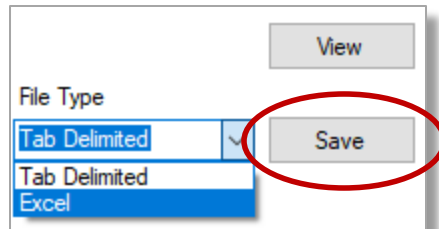
Show Weekly Sales
Number of Weeks 52

Include Deleted Items

View

File Type
Tab Delimited

Save



File Type

Tab Delimited

Tab Delimited

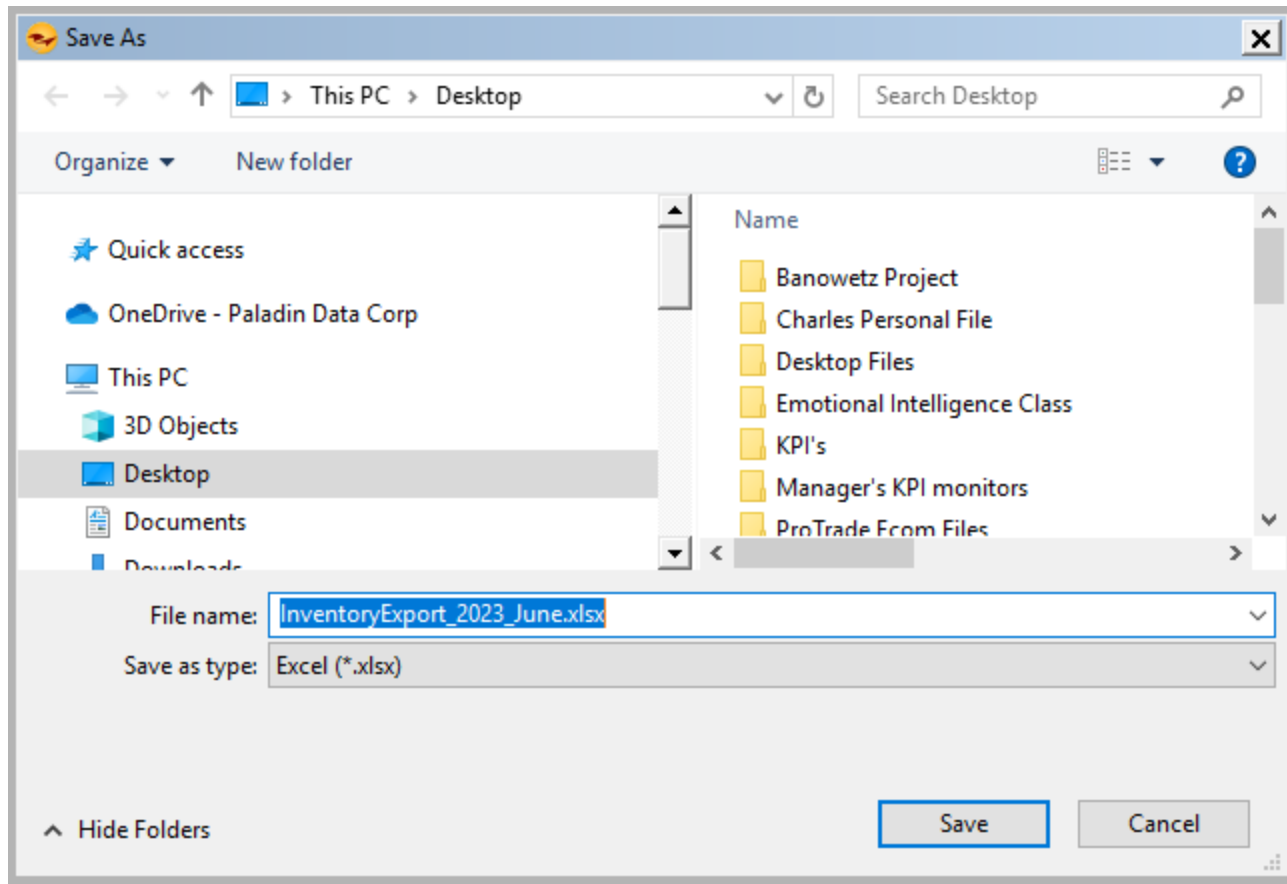
Excel

View

Save

6. In the **Number of Weeks** box, enter how many weeks that you want to view.
7. Optional: Check **Include Deleted Items**.
8. To verify the data that you want to export, click **View**. The data field will populate.
9. When you are sure that you want to export the data, from the **File Type** list, select either **Tab Delimited** or **Excel**.
10. Click **Save**.

Process for exporting data from Paladin (cont'd)



11. In the **Save Inventory Export File** window, browse to a location for saving the file.
12. In the **File** name box, enter a file name.
Example:
InventoryExport_2015_August.xlsx if Excel was the file type, or
InventoryExport_2015_August.csv if Tab Delimited was the file type.
13. Click **Save**.

Process for exporting data from Paladin (cont'd)

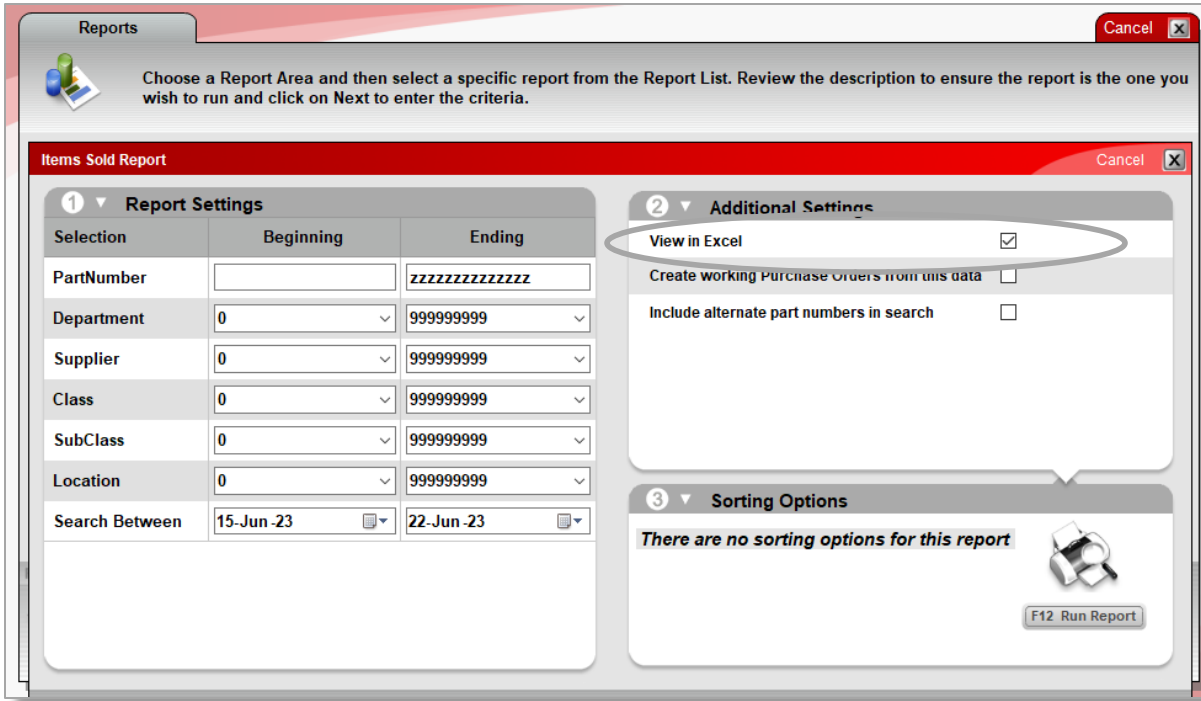


Other exportable Paladin tables include:

- Customer data
- Purchase order information
- General ledger summary by date range
- Invoices by date range

Alternative ways to export data from Paladin

- Exporting data from the Data Viewer includes more information than you will most likely need or will use.
- As an alternative, many reports in Paladin either open in Excel or provide the ability to select a “View in Excel” option, such as:
 - Master report
 - Items sold report
 - Inventory count list
 - Discontinued items report
 - Most magnifying glass drill down lists
 - And many other reports



Reports

Choose a Report Area and then select a specific report from the Report List. Review the description to ensure the report is the one you wish to run and click on Next to enter the criteria.

Items Sold Report

Selection	Beginning	Ending
PartNumber		zzzzzzzzzzzzzzzz
Department	0	999999999
Supplier	0	999999999
Class	0	999999999
SubClass	0	999999999
Location	0	999999999
Search Between	15-Jun-23	22-Jun-23

Additional Settings

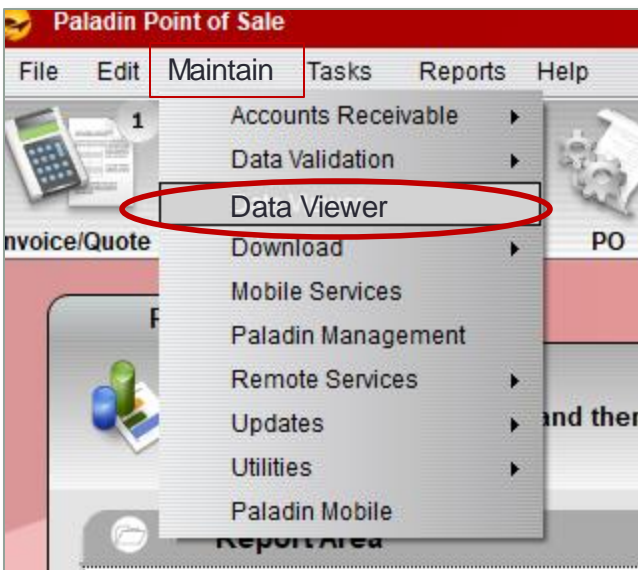
- View in Excel
- Create working Purchase Orders from this data
- Include alternate part numbers in search

Sorting Options

There are no sorting options for this report

F12 Run Report

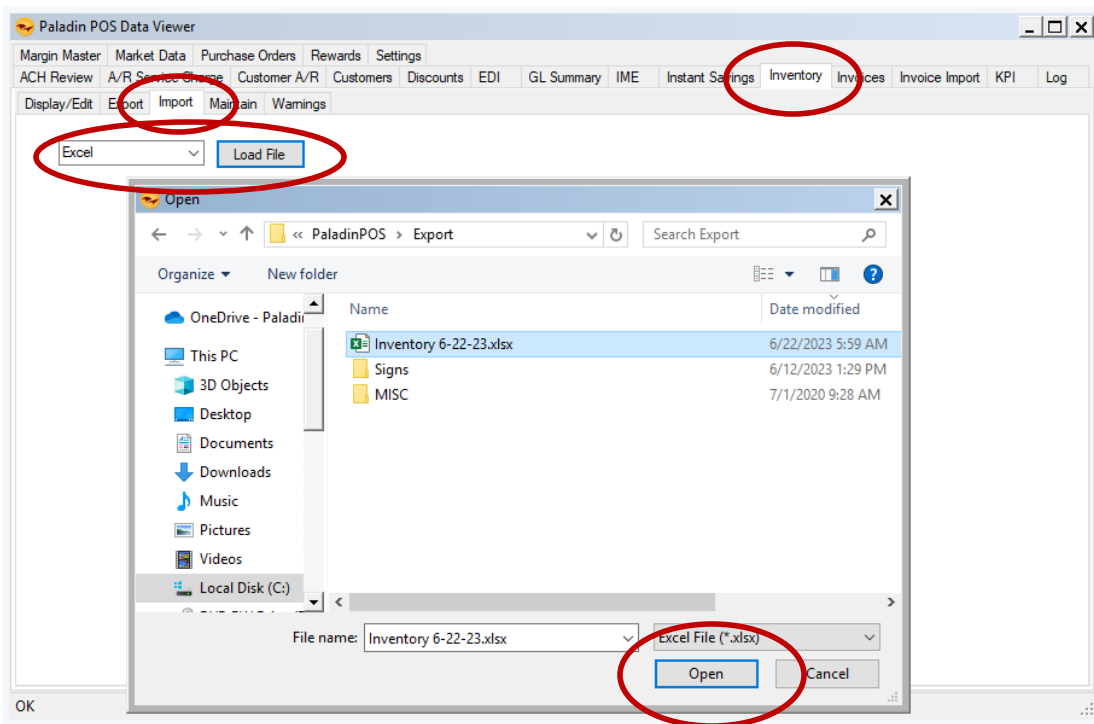
Importing inventory data into Paladin



In preparation for importing, first run a backup:

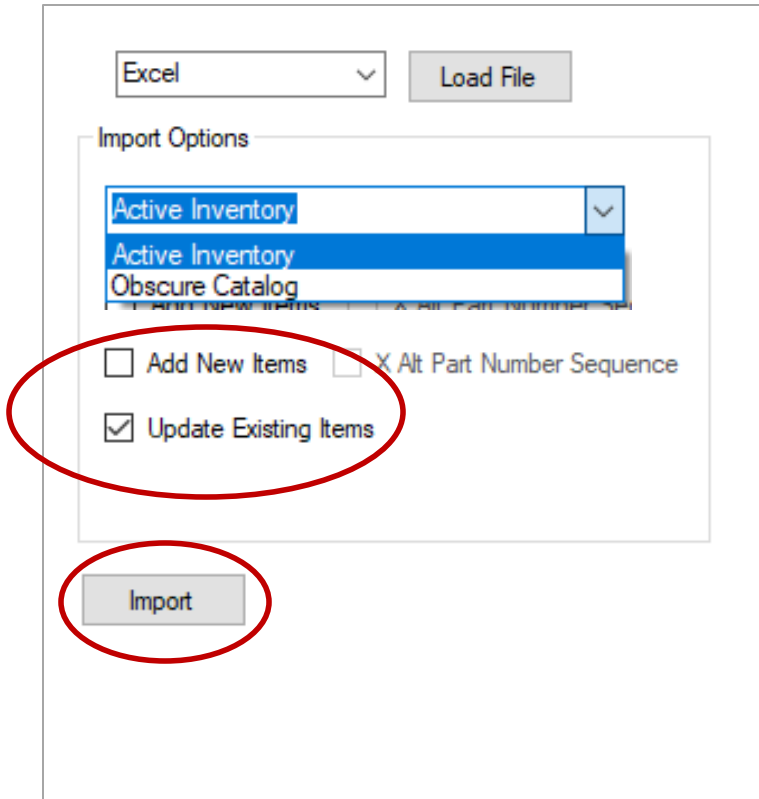
1. On your primary Paladin database server, usually named Terminal-1, on the top ribbon, select the **Backup** module.
2. In the **Backup** window, click **Yes**.
3. When the backup is finished, go to the shortcut for **Backups**, and verify the following information.
 - Date of backup
 - Time of backup
 - Size of backup (Note: The size of the new backup should be higher than the previous one.)
4. Next, on the top menu, select **Maintain > Data Viewer**.

Importing inventory data into Paladin (cont'd)



5. Select the **Inventory** tab, and then click the **Import** tab.
6. Select either **Tab Delimited** or **Excel** from list next to the **Load File** button.
7. Click **Load File**.
8. Browse to the file you want to import, select the file, then click **Open**.

Importing inventory data into Paladin (cont'd)



Excel

Import Options

Active Inventory

Active Inventory

Obscure Catalog

Add New Items X Alt Part Number Sequence

Update Existing Items

9. In the **Import Options** pane, in the **Inventory Type** dropdown list, select **Active Inventory** or **Obscure Catalog**.
 - Active Inventory: Inventory carried in your store.
 - Obscure Catalog: Inventory available through supplier.
10. Check **Add New Items** or check **Update Existing Items**.
11. Verify a backup has been made, click **Import**.
12. When the import is completed, click **Close**.
13. In Paladin, on the top ribbon, select the **Inventory** module.
14. Spot check a few part numbers from the import file and check all fields for accuracy.

Taking precautions when importing data



- Make a backup before executing the Import function.
- Export your entire inventory as a secondary backup of your inventory data.
- It's best to perform the import after hours when no one is logged into Paladin.
- Garbage in, garbage out. Validate your data before running the import as it can be destructive if you're not careful.
- Should be done with KBA in hand and/or Paladin Support on the line, especially if it's your first time.

Open DataBase Connectivity ODBC option



ODBC

- Open Database Connectivity (ODBC) is an open standard application programming interface (API) for accessing a database.
- By using ODBC statements in a program, you can access files in many different databases, including Access, dBase, DB2, Excel, and Text.

Open DataBase Connectivity ODBC option (cont'd)

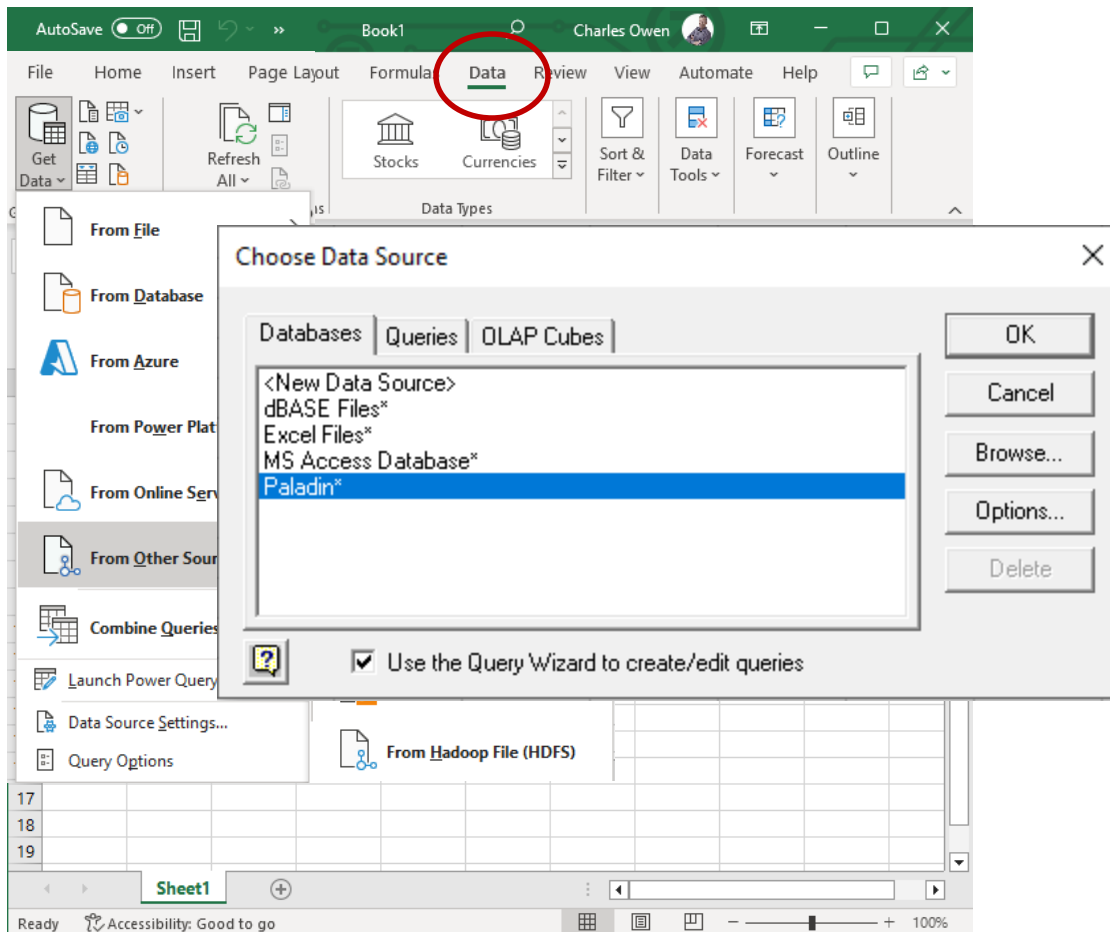


ODBC



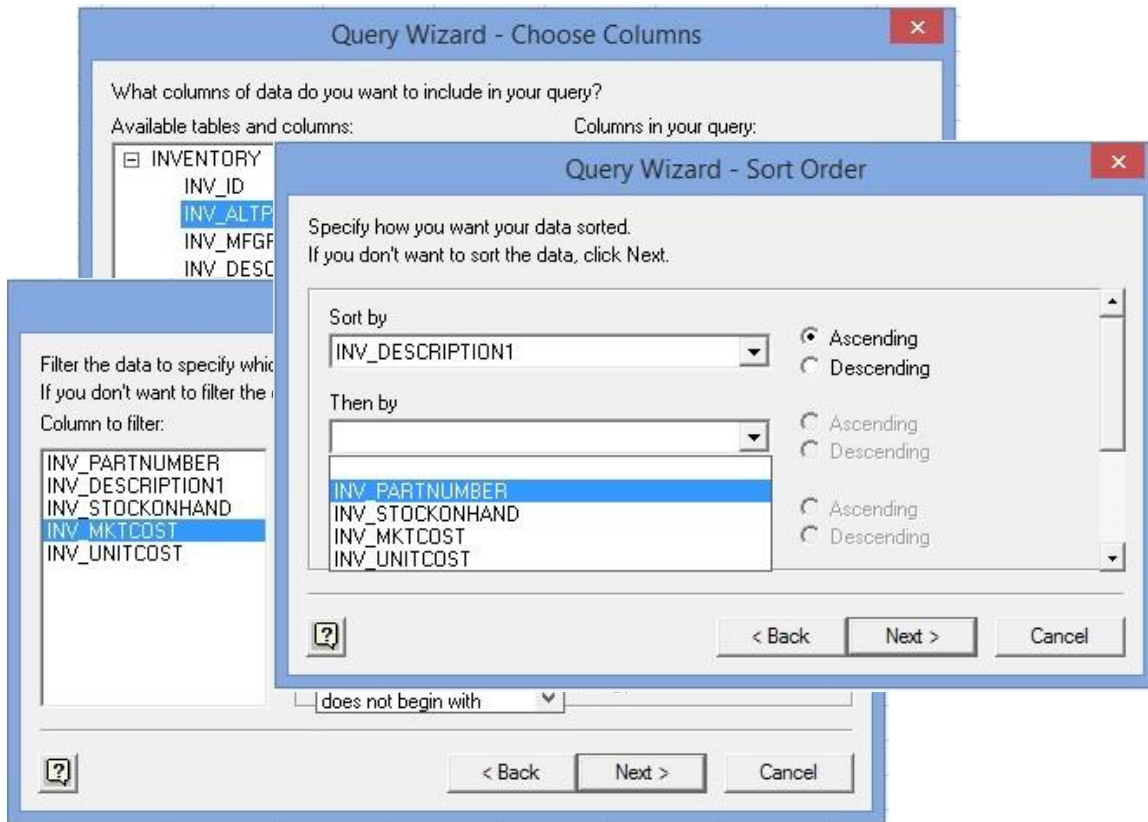
- Quickly create custom reports.
- Access POS data in a column and row format.
- Easily sort data, create custom reports and statements.
- You can get access to most tables in Paladin POS.
- The Paladin ODBC connector is **Read-Only**.

Open DataBase Connectivity ODBC option (cont'd)



1. In Excel, Select **Data**
2. Select **Get Data**
3. Select **Get Data from Other Sources**
4. Select **From Microsoft Query**
5. Select ***Paladin Database**

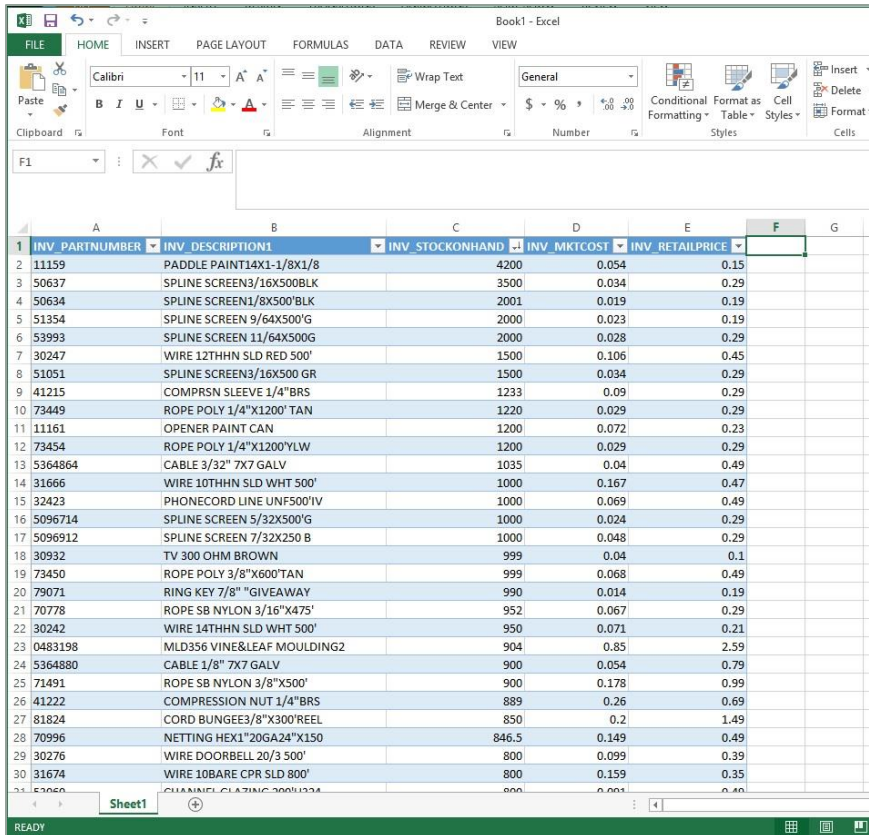
Open DataBase Connectivity ODBC option (cont'd)



Next, follow the MS Excel Wizard prompts:

- Select the table
- Select the fields/columns
- Apply optional filters
- Set optional sort order

Open DataBase Connectivity ODBC option (cont'd)



INV_PARTNUMBER	INV_DESCRIPTION1	INV_STOCKONHAND	INV_MKTCOST	INV_RETAILPRICE
11159	PADDLE PAINT14X1-1/8X1/8	4200	0.054	0.15
50637	SPLINE SCREEN3/16X500BLK	3500	0.034	0.29
50634	SPLINE SCREEN1/8X500'BLK	2001	0.019	0.19
51354	SPLINE SCREEN 9/64X500'G	2000	0.023	0.19
53993	SPLINE SCREEN 11/64X500'G	2000	0.028	0.29
30247	WIRE 12THHN SLD RED 500'	1500	0.106	0.45
51051	SPLINE SCREEN3/16X500 GR	1500	0.034	0.29
41215	COMPRSN SLEEVE 1/4"BRS	1233	0.09	0.29
73449	ROPE POLY 1/4"X1200' TAN	1220	0.029	0.29
11161	OPENER PAINT CAN	1200	0.072	0.23
73454	ROPE POLY 1/4"X1200'YLW	1200	0.029	0.29
5364864	CABLE 3/32" 7X7 GALV	1035	0.04	0.49
31666	WIRE 10THHN SLD WHT 500'	1000	0.167	0.47
32423	PHONECORD LINE UNF500'IV	1000	0.069	0.49
5096714	SPLINE SCREEN 5/32X500'G	1000	0.024	0.29
5096912	SPLINE SCREEN 7/32X250 B	1000	0.048	0.29
30932	TV 300 OHM BROWN	999	0.04	0.1
73450	ROPE POLY 3/8"X600'TAN	999	0.068	0.49
79071	RING KEY 7/8" "GIVEAWAY	990	0.014	0.19
70778	ROPE SB NYLON 3/16"X475'	952	0.067	0.29
30242	WIRE 14THHN SLD WHT 500'	950	0.071	0.21
0483198	MLD356 VINE&LEAF MOULDING2	904	0.85	2.59
5364880	CABLE 1/8" 7X7 GALV	900	0.054	0.79
71491	ROPE SB NYLON 3/8"X500'	900	0.178	0.99
41222	COMPRESSION NUT 1/4"BRS	889	0.26	0.69
81824	CORD BUNGEE3/8"X300'REEL	850	0.2	1.49
70996	NETTING HEX1"20GA24"X150	846.5	0.149	0.49
30276	WIRE DOORBELL 20/3 500'	800	0.099	0.39
31674	WIRE 10BARE CPR SLD 800'	800	0.159	0.35

- All of the data instantly appears in a column and row format.
- Add additional sorting options or formulas for custom reporting.
- This SQL script can be saved to run this same report in the future.

Learn More

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

- [Single Store: How to import inventory data into a Paladin database](#)

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

Next Webinar:

Round Up for Charity Promotes Philanthropy
and Your Business

July 18

9am PT

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