



Simplifying Sales with Paladin

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WHAT YOU'LL LEARN

Simplifying sales with Paladin

- Benefits of sales, promotions, and trade discounts
- Basic structure of a sale
- How to create a sale list
- How to import a sale list
- How to setup and activate sales in Paladin
- How to create a pricing plan
- How to create a blanket pricing plan not associated with a sale list
- How to print a sales report and export data for signs
- How to print bin tags for sale items

Benefits of sales, promotions and trade discounts



“Everyone loves a bargain”

- Provides upsell opportunities.
- Helps to stimulate new customer acquisition.
- Incentivizes local businesses and loyal customers to shop more often.
- Increases average ticket price through the sale of blind items purchased with items on sale.
- Draws customers into the store.
- Gives your store a competitive edge over the competition.

Basic structure of a sale

Individual sale items may be contained in a Sale List and subject to rules set forth in the Pricing Plan.

Sale List + **Pricing Plan** = **Discount**

The pricing plan is the activator as the sale list is dependent on the pricing plan

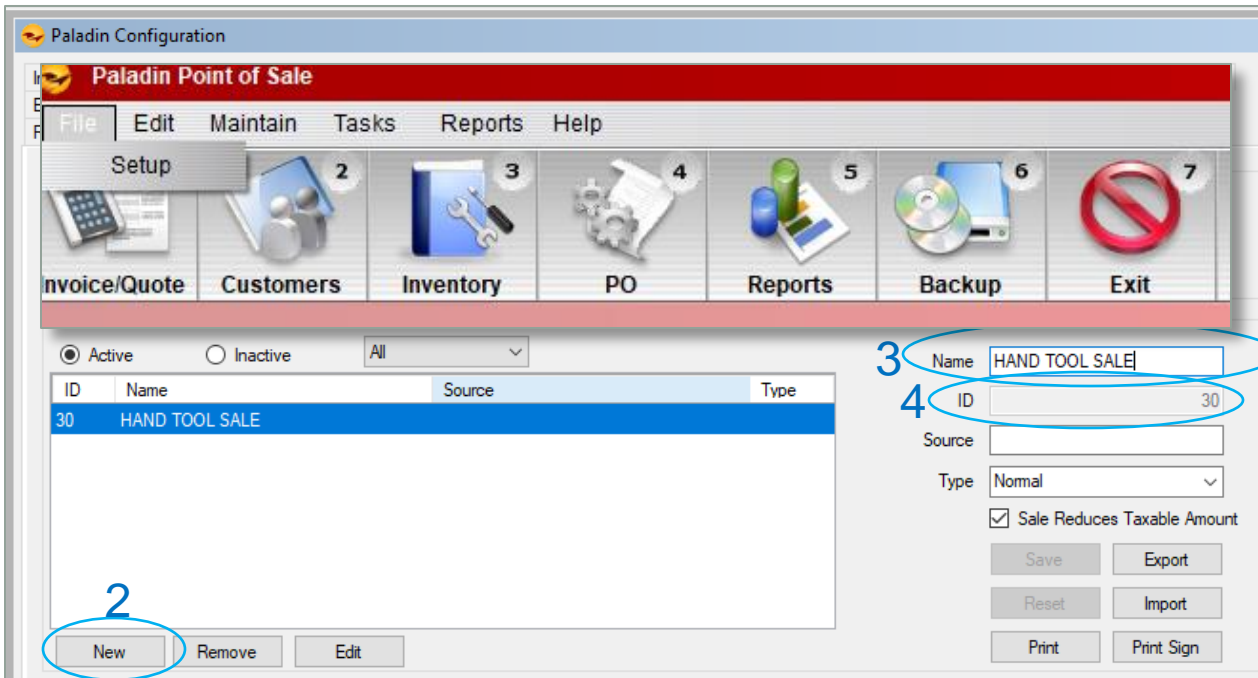
A Pricing Plan can be used independently from a Sale List and include blanket sales by department, class, supplier, date range, etc.

~ or ~

Pricing Plan = **Discount**

The pricing plan can run independently of a sale list

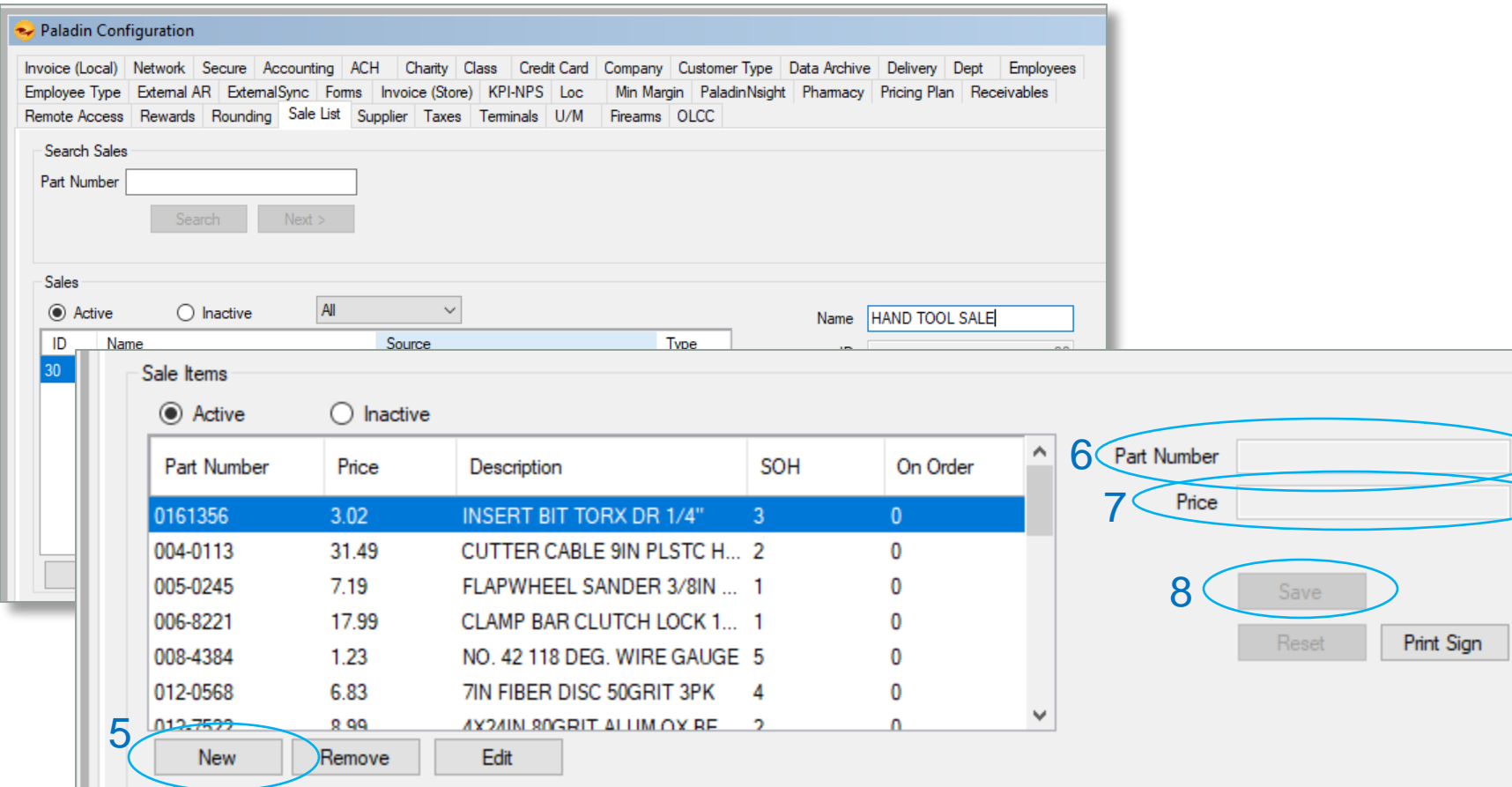
How to create a Sale List



On the **File** menu in Paladin, click **Setup**.

1. In the **Paladin Configuration** window, click the **Sale List** tab.
2. In the **Sales** section, click **New**.
3. In the **Name** box, enter a name for the sale.
4. In the **ID** box, enter a unique ID number and click **Save**.

How to create a Sale List (cont'd)



Paladin Configuration

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

Search Sales
Part Number
Search Next >

Sales
 Active Inactive All Name

ID	Name	Source	Type
30			

Sale Items
 Active Inactive

Part Number	Price	Description	SOH	On Order
0161356	3.02	INSERT BIT TORX DR 1/4"	3	0
004-0113	31.49	CUTTER CABLE 9IN PLSTC H...	2	0
005-0245	7.19	FLAPWHEEL SANDER 3/8IN ...	1	0
006-8221	17.99	CLAMP BAR CLUTCH LOCK 1...	1	0
008-4384	1.23	NO. 42 118 DEG. WIRE GAUGE	5	0
012-0568	6.83	7IN FIBER DISC 50GRIT 3PK	4	0
012-7522	8.99	4X2MIN 80GRIT ALUMINOX BE	2	0

Active Inactive

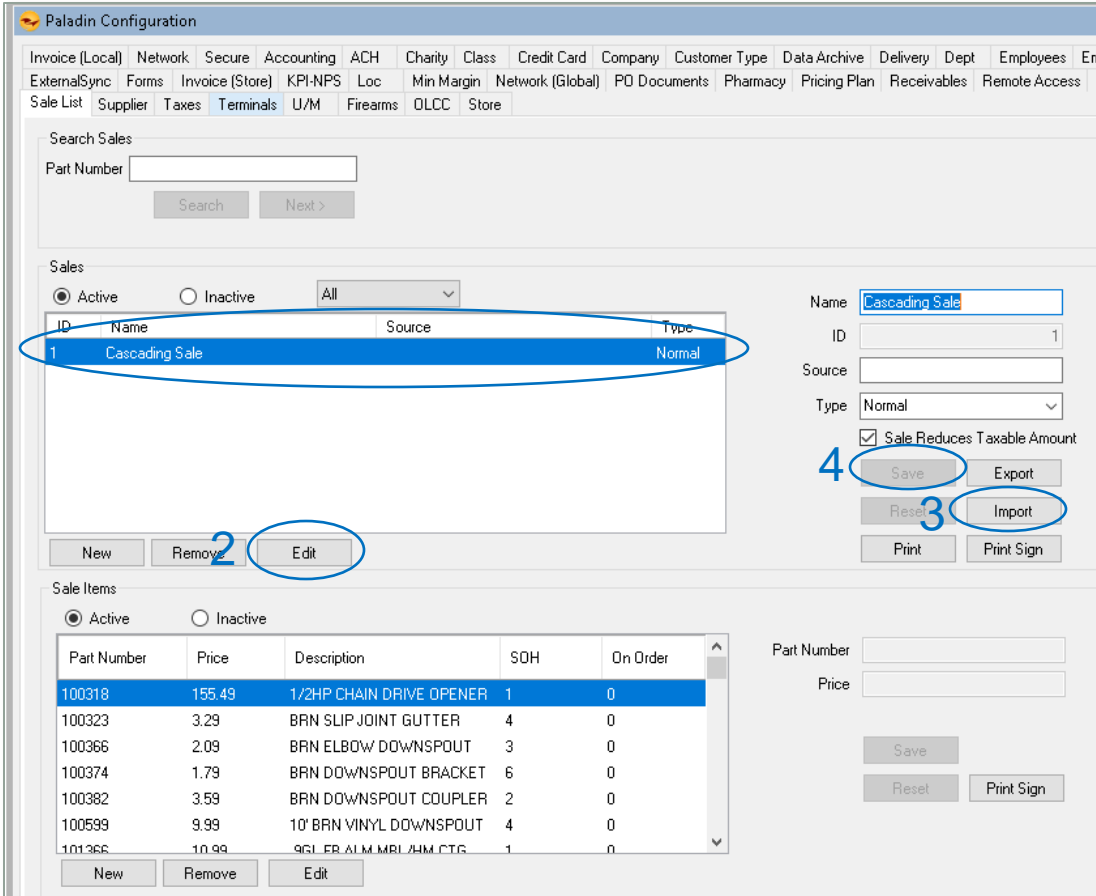
6 Part Number
7 Price
8 Save
Reset Print Sign

5 New Remove Edit

- Next, to add sale items, click **New** under the **Sale Items** pane.
- Enter a **Part Number**.
- Enter a **Sale Price**
- Press **Save** between each item entered.

How to import a sale list

To create a sale list import file, use Excel or Notepad.



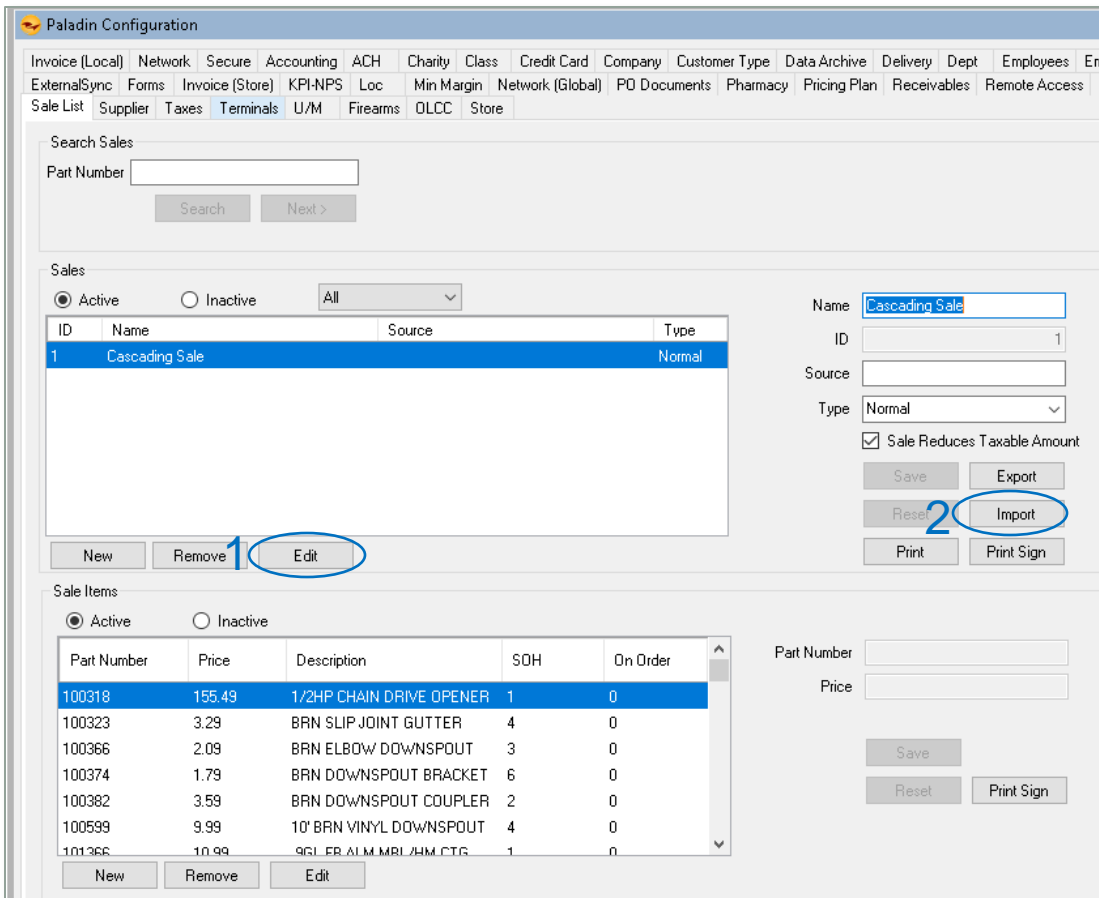
The screenshot shows the 'Paladin Configuration' window. In the 'Sales' pane, a table lists sales with columns 'ID', 'Name', 'Source', and 'Type'. The first row, '1 Cascading Sale Normal', is selected and circled with a blue oval labeled '1'. Below the table, the 'Edit' button is circled with a blue oval labeled '2'. To the right, the 'Name' field contains 'Cascading Sale', and the 'Save' button is circled with a blue oval labeled '4'. The 'Import' button is circled with a blue oval labeled '3'. The 'Sale Items' pane at the bottom shows a list of items with columns 'Part Number', 'Price', 'Description', 'SOH', and 'On Order'.

Create a document with two columns.
 Add a header to the top row of both columns;
 "PartNumber" and "SalePrice".
 Add all desired part numbers and sale prices.
 Save the file as a text file (.txt)

	A	B
1	PartNumber	SalePrice
2	457643	5.99
3	292823	3.99
4	875432	1.99

1. Select a **Sale List** or create a new one.
2. In the **Sales** pane click the **Edit** button.
3. Select the **Import**, button and choose the file containing the sale items.
4. Press **Save**.

How to import a sale list (cont'd)



Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type Data Archive Delivery Dept Employees En
ExternalSync Forms Invoice (Store) KPI-NPS Loc Min Margin Network (Global) PO Documents Pharmacy Pricing Plan Receivables Remote Access
Sale List Supplier Taxes Terminals U/M Firearms OLCC Store

Search Sales
Part Number
Search Next >

Sales
 Active Inactive All
Name Cascading Sale
ID 1
Source
Type Normal
 Sale Reduces Taxable Amount
Save Export
Reset **Import**
Print Print Sign

New Remove **Edit**

Sale Items
 Active Inactive
Part Number Price Description SOH On Order
100318 155.49 1/2HP CHAIN DRIVE OPENER 1 0
100323 3.29 BRN SLIP JOINT GUTTER 4 0
100366 2.09 BRN ELBOW DOWNSPOUT 3 0
100374 1.79 BRN DOWNSPOUT BRACKET 6 0
100382 3.59 BRN DOWNSPOUT COUPLER 2 0
100599 9.99 10' BRN VINYL DOWNSPOUT 4 0
101366 10.99 9GLER ALUM MRL/HM CTG 1 0
New Remove Edit

Note: The **sale list importer** is a fast and easy method for creating a sale list. You may also use the RF Gun to add items to your import file as well. See **KBA ID: 26548**: [How to use the RF unit to import a Sale List and activate a sale](#)

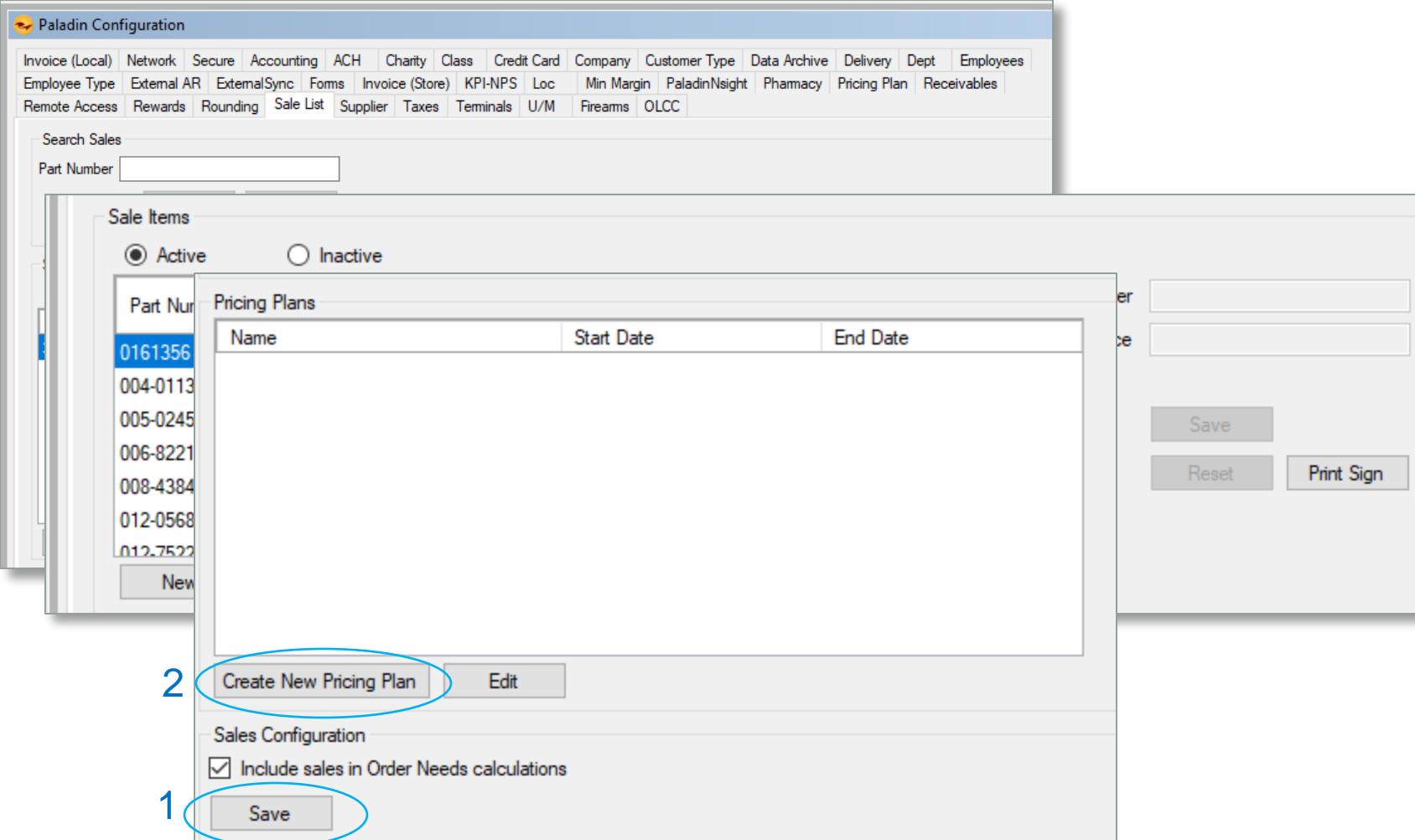
In addition: Paladin has recently added a new **Clearance** feature to the **PaladinNsight** dashboard, which allows for automatic creation of sale lists for non-performing inventory assets.

Stay tuned: A similar feature is being roll-out to the **RF Terminal** in the near future.

How to activate a sale list in Paladin

On the bottom of the **Sale List** pane:

1. Press **Save**.
2. Press **Create New Pricing Plan**.
3. The **Pricing Plan** setup screen will appear (see next slide).



The screenshot displays the Paladin Configuration interface. The top navigation bar includes various menu items such as Invoice (Local), Network, Secure, Accounting, ACH, Charity, Class, Credit Card, Company, Customer Type, Data Archive, Delivery, Dept, Employees, Employee Type, External AR, ExternalSync, Foms, Invoice (Store), KPI-NPS, Loc, Min Margin, PaladinNaight, Pharmacy, Pricing Plan, Receivables, Remote Access, Rewards, Rounding, Sale List, Supplier, Taxes, Terminals, U/M, Firearms, and OLCC. The Sale List pane is active, showing a list of Part Numbers. The Pricing Plan setup screen is overlaid on top, featuring a table with columns for Name, Start Date, and End Date. The 'Create New Pricing Plan' button is circled in blue and labeled with a '2', and the 'Save' button is circled in blue and labeled with a '1'. The 'Sales Configuration' section at the bottom has a checked checkbox for 'Include sales in Order Needs calculations'.

How to activate a sale list in Paladin (cont'd)

Pricing Plans

Active Inactive

All

Name

Apply to all transactions Limit to Rewards Customers

Search:

Name

Employee 20%

OWNER

STORE USE

VETERAN

Respect min margin

Sale List Range Start

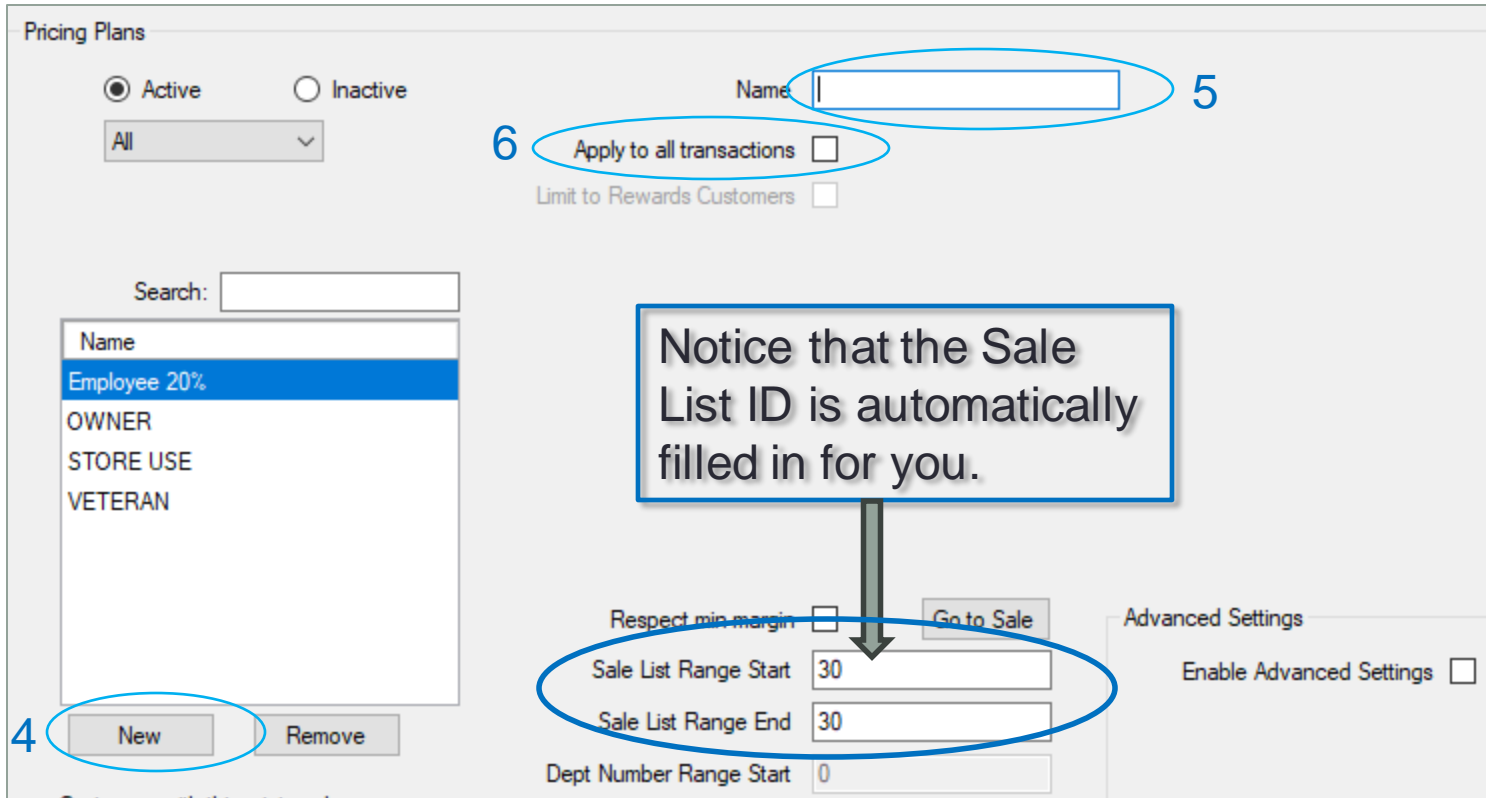
Sale List Range End

Dept Number Range Start

Advanced Settings

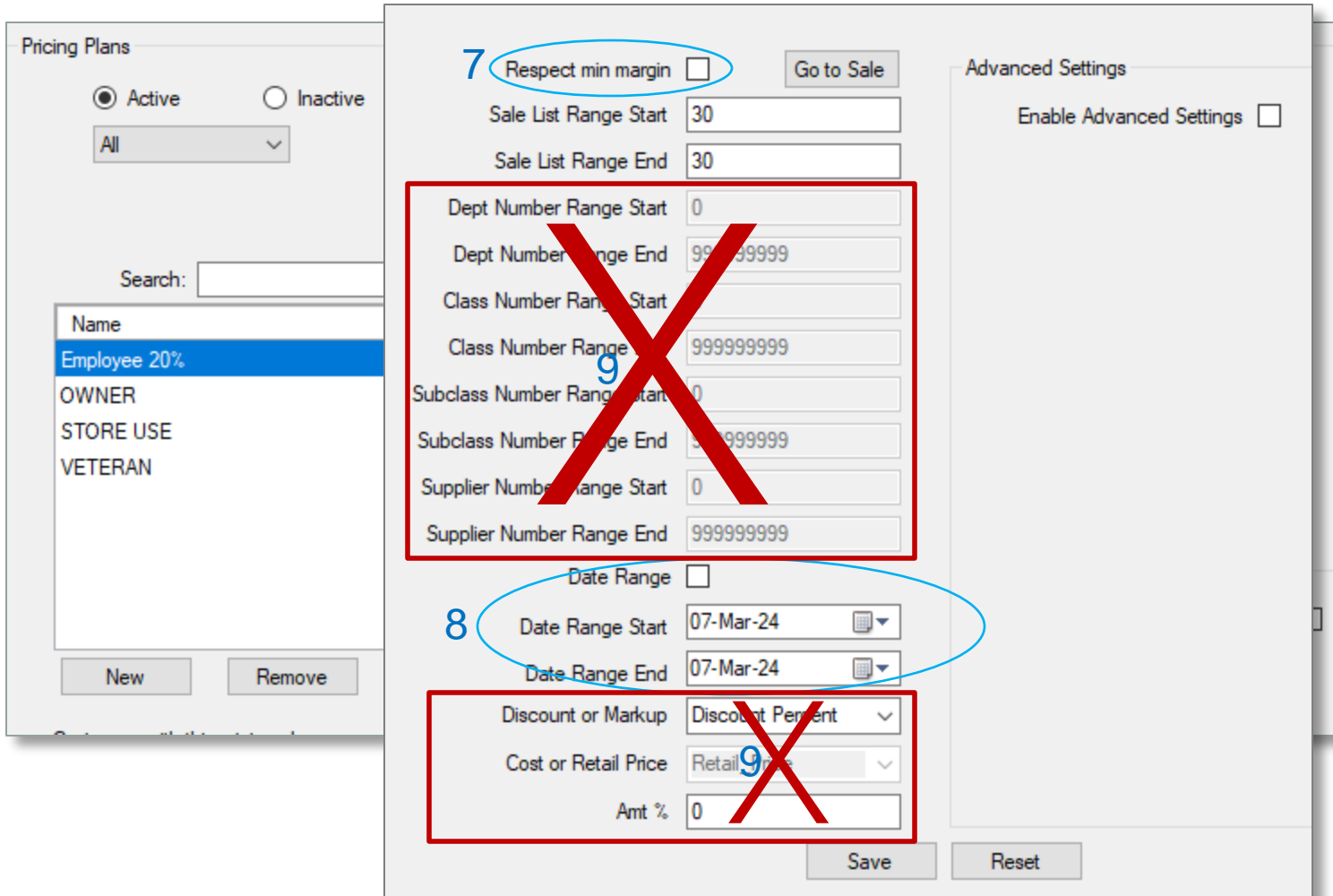
Enable Advanced Settings

Notice that the Sale List ID is automatically filled in for you.



4. Press **New**.
5. Enter name of **New Pricing Plan**.
6. Select '**Apply to all transactions**' if this is a store-wide promotion. Do not select this option if it is a **Trade Discount** intended for specific individuals or a specific company.

How to activate a sale list in Paladin (cont'd)



7 Respect min margin Go to Sale

Sale List Range Start 30
Sale List Range End 30

Dept Number Range Start 0
Dept Number Range End 99999999
Class Number Range Start
Class Number Range End 99999999
Subclass Number Range Start 0
Subclass Number Range End 99999999
Supplier Number Range Start 0
Supplier Number Range End 99999999

8 Date Range
Date Range Start 07-Mar-24
Date Range End 07-Mar-24

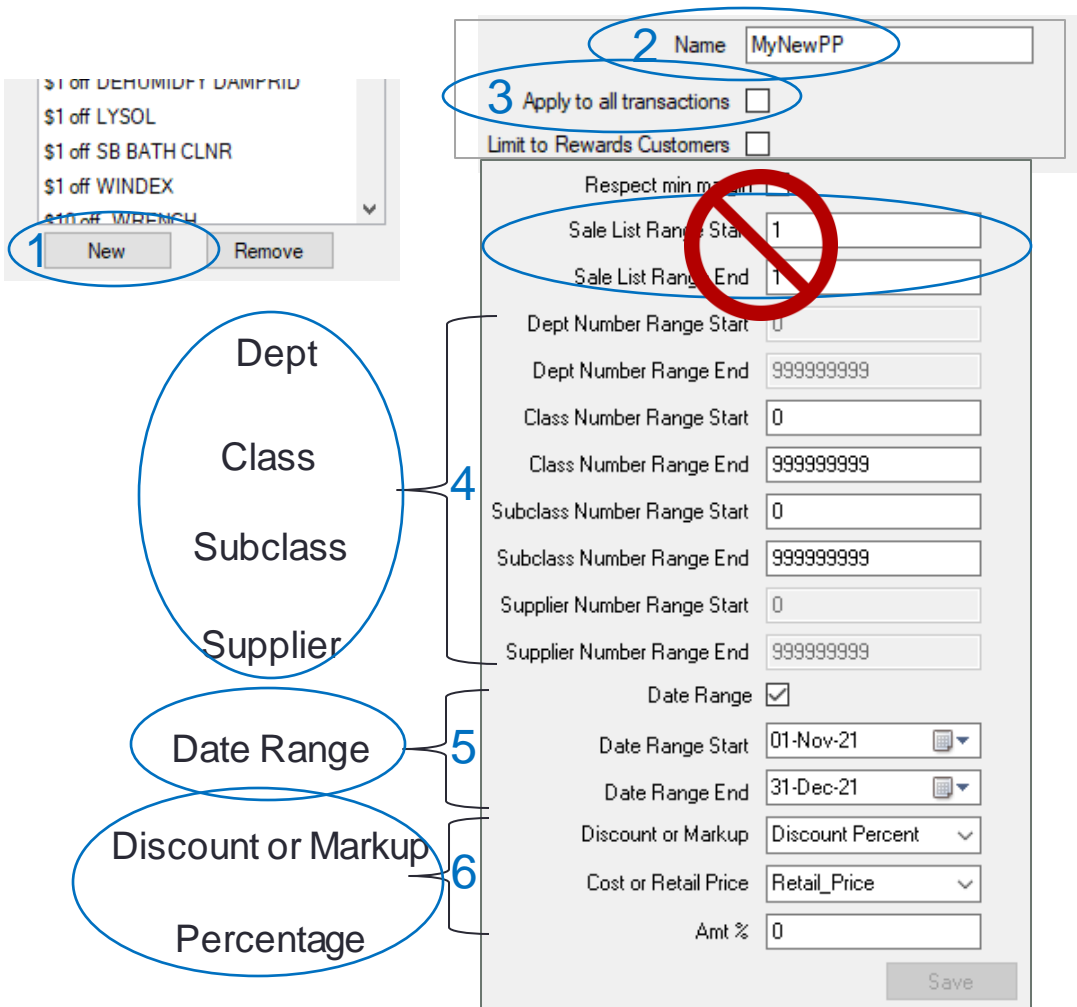
Discount or Markup Discount Percent
Cost or Retail Price Retail Price
Amt % 0

Advanced Settings
Enable Advanced Settings

Save Reset

7. Select '**Respect minimum margin**' if you wish avoid selling below minimum margins at checkout.
8. Optionally, you may elect to activate a beginning and ending **date range** for the sale.
9. Because we are using predefined sale items with predefined sale prices, all other fields should remain **unselected and unchanged**.

How to create a blanket pricing plan not associated with a sale list



1 New Remove

2 Name MyNewPP

3 Apply to all transactions

Limit to Rewards Customers

Respect min amount

4 Dept
Class
Subclass
Supplier

5 Date Range

6 Discount or Markup
Percentage

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 999999999

Date Range

Date Range Start 01-Nov-21

Date Range End 31-Dec-21

Discount or Markup Discount Percent

Cost or Retail Price Retail_Price

Amt % 0

Save

1. In the **Pricing Plans** section, click **New**.
2. In the **Name** box, enter a name for the pricing plan.
3. For global promotions check the box to “**Apply to all transactions.**” For trade discounts to be assigned to selected customers, keep the box unchecked.
4. Ignore Sale list range and choose either Department, Class, Subclass, or Supplier, **ID range**.
5. Optionally, you can set a beginning and ending date.
6. Set your desired Discount or Markup, Cost or Retail Price, then choose the percentage amount.

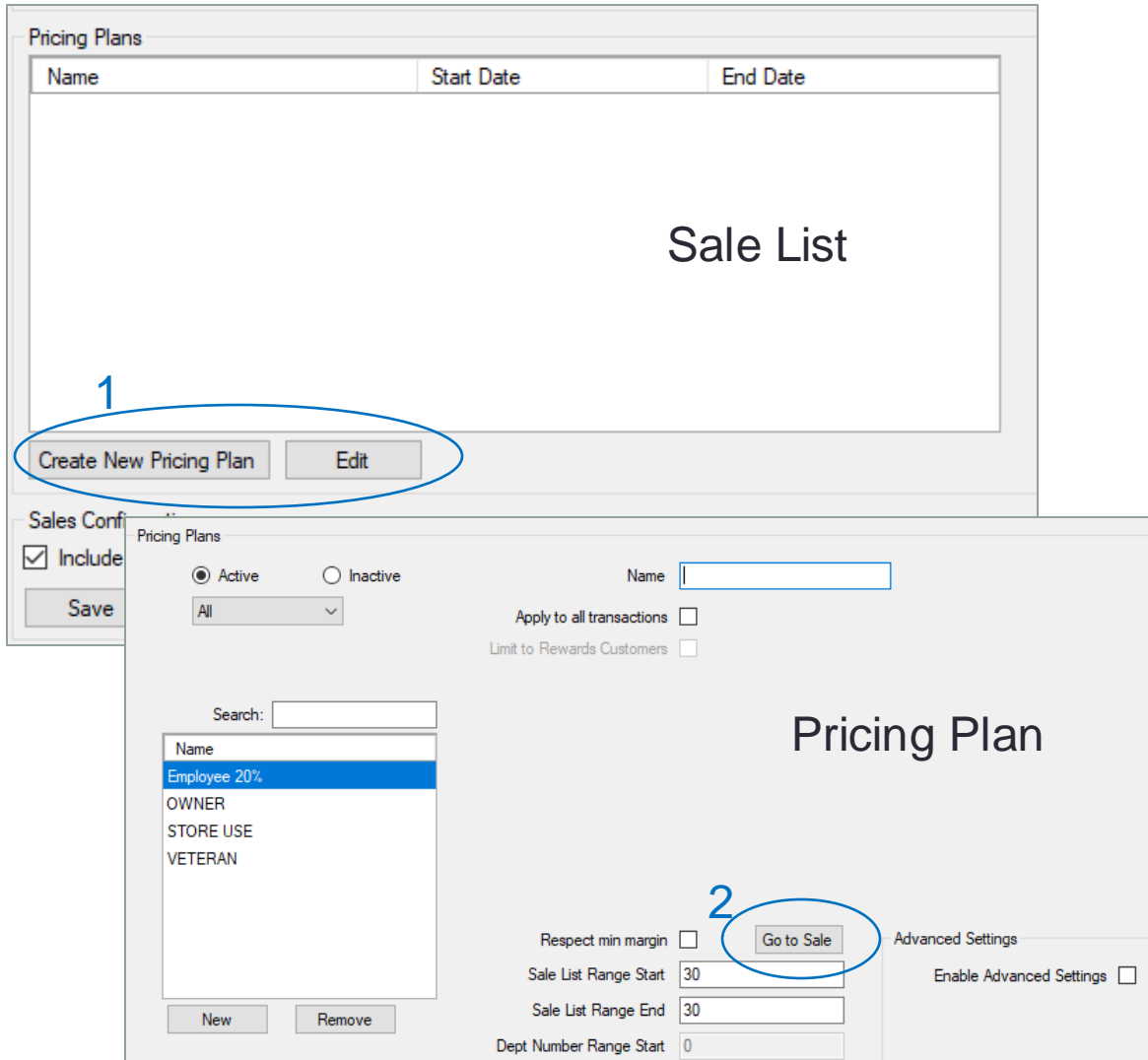
Pricing plan range choices

Department	In the Dept Number Range Start and End boxes, enter the supplier number ID range.
Class	In the Class Number Range Start and End boxes, enter the class number ID range.
Subclass	In the Subclass Number Range Start and End boxes, enter the subclass number ID range.
Supplier	In the Supplier Number Range Start and End boxes, enter the supplier number ID range.
Date	In the Date Range Start and End fields, check the Date Range box and select the beginning and ending dates.
Discount or Markup Cost or Price	In the Discount or Markup list, select one. In the Cost or Retail Price list, select the type of cost or retail price.
Percentage	In the Amt% box, enter the desired percentage amount.

Navigating between Sales List and Pricing Plan

When in the Paladin Configuration **Sale List** or **Pricing Plan** panes, you can easily switch between the two.

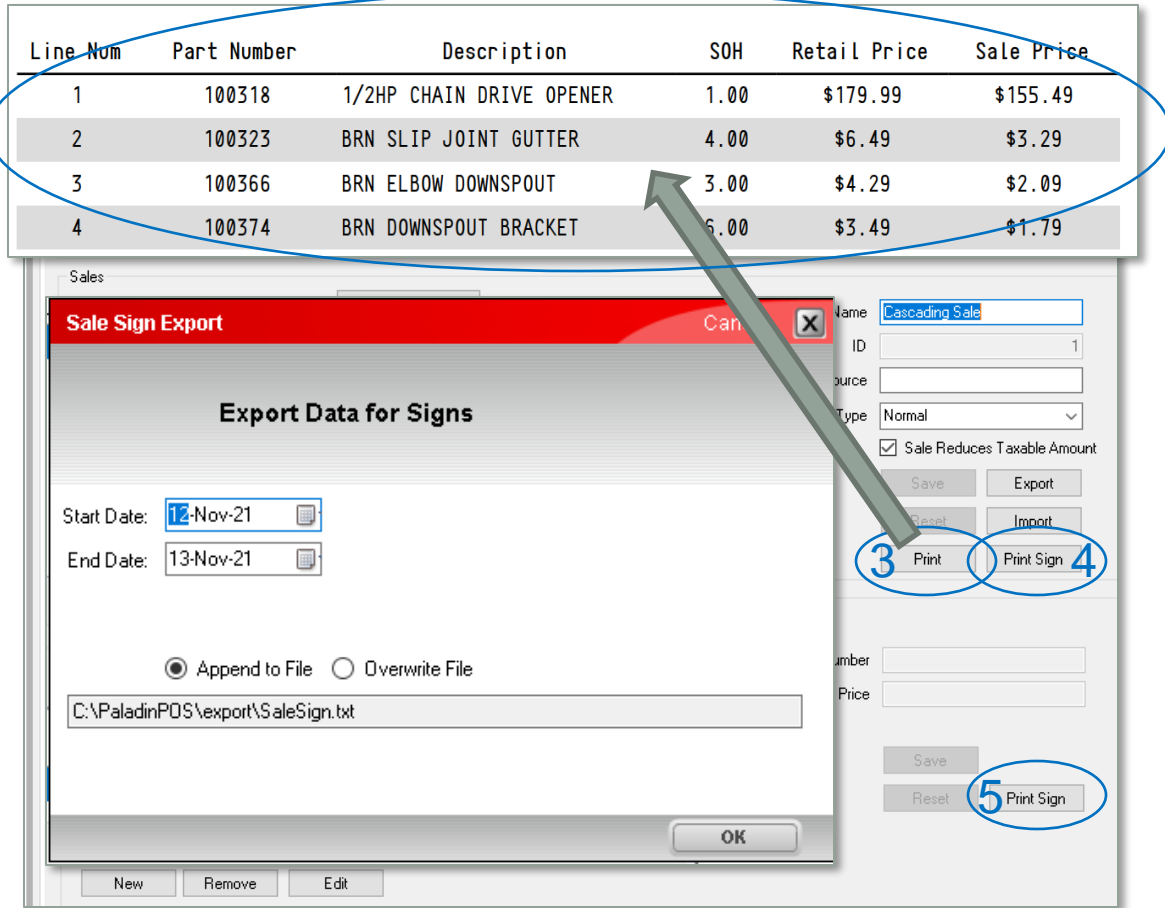
1. In the **Pricing Plans** pane of the **Sale List** tab, click **Create New Pricing Plan** or **Edit** to recall the **Pricing Plan** tab.
2. When in the **Pricing Plan** tab, click **Go to Sale** to return to the **Sale List** tab.



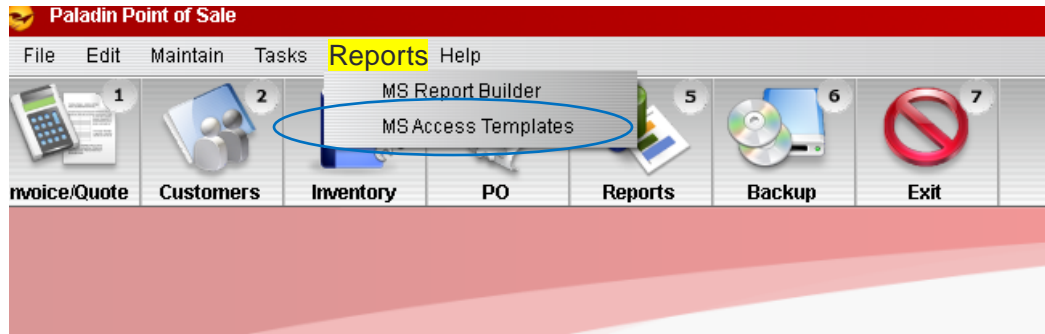
The screenshot displays two overlapping panels from the Paladin Configuration software. The top panel, titled "Pricing Plans", shows a table with columns for "Name", "Start Date", and "End Date". The table is currently empty and labeled "Sale List". Below the table, the "Create New Pricing Plan" and "Edit" buttons are circled in blue, with a blue "1" next to them. The bottom panel, titled "Pricing Plan", shows configuration options for a pricing plan. It includes a "Name" field, "Active" and "Inactive" radio buttons, a "Save" button, and a "Search" dropdown menu. The "Search" dropdown is open, showing a list of items: "Employee 20%", "OWNER", "STORE USE", and "VETERAN". The "Employee 20%" item is selected. Below the search dropdown, the "Go to Sale" button is circled in blue, with a blue "2" next to it. Other fields include "Apply to all transactions", "Limit to Rewards Customers", "Respect min margin", "Sale List Range Start", "Sale List Range End", "Dept Number Range Start", and "Advanced Settings".

How to print a sales report and export data for signs

Line Num	Part Number	Description	SOH	Retail Price	Sale Price
1	100318	1/2HP CHAIN DRIVE OPENER	1.00	\$179.99	\$155.49
2	100323	BRN SLIP JOINT GUTTER	4.00	\$6.49	\$3.29
3	100366	BRN ELBOW DOWNSPOUT	3.00	\$4.29	\$2.09
4	100374	BRN DOWNSPOUT BRACKET	5.00	\$3.49	\$1.79



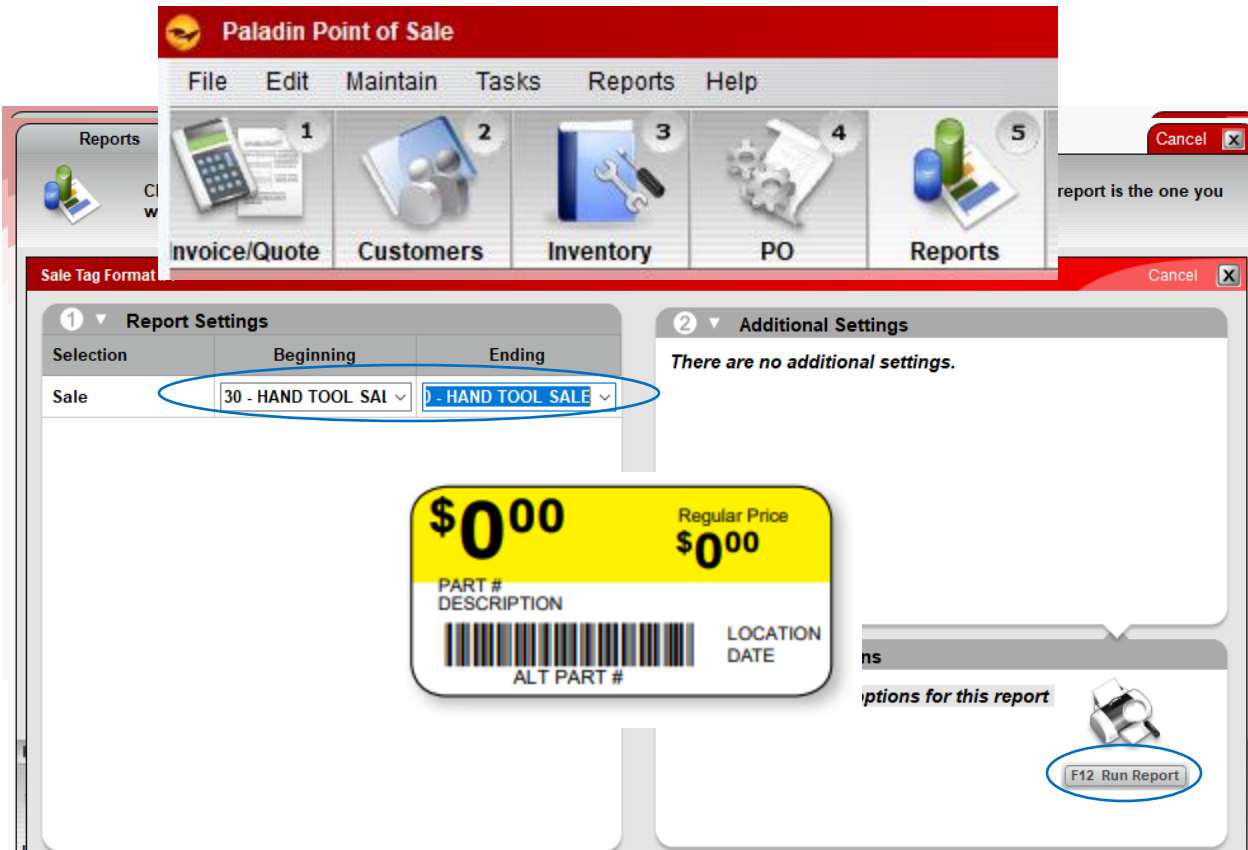
1. On the **File** menu, click **Setup**.
2. In **Paladin Configuration**, click the **Sale List** tab, then select a print option:
3. To print a report listing all sale items: Click **Print** in the **Sales** pane.
4. For a sale sign for a selected sale including all items, in the **Sales List** pane click **Print Sign**.
5. To print a sale sign for a selected item: In the **Sale Items** pane, click **Print Sign**.
6. Enter date range of the sale.
7. Click **OK** – A data file of the sale item(s) is created.



How to print sale signs

1. Click **Reports** on the menu bar in Paladin.
2. Select **MS Access Templates**.
3. Select **Sales Signs**.
4. Select desired sale sign size and type.
Note: See the LTSR Catalog in Paladin knowledgebase to view all sign types.
5. Click **Print**
6. Click **Close**

How to print bin tags for sale items



1. Go to the **Reports module** in Paladin.
2. Select Inventory → Labels → **Sale Tag Format #1**.
3. Under Report Setting enter the beginning and ending **Sale List**.
4. Select **Run Report**.
5. The bin tags will be created on the dedicated label printer.

Next Webinar:

New PaladinN sight™ Clearance Feature
Helps You Clean Up Your Inventory

April 2, 2024

9am PT

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