UNIVERSITY

Paladin's Latest and Greatest Features Help You Do More

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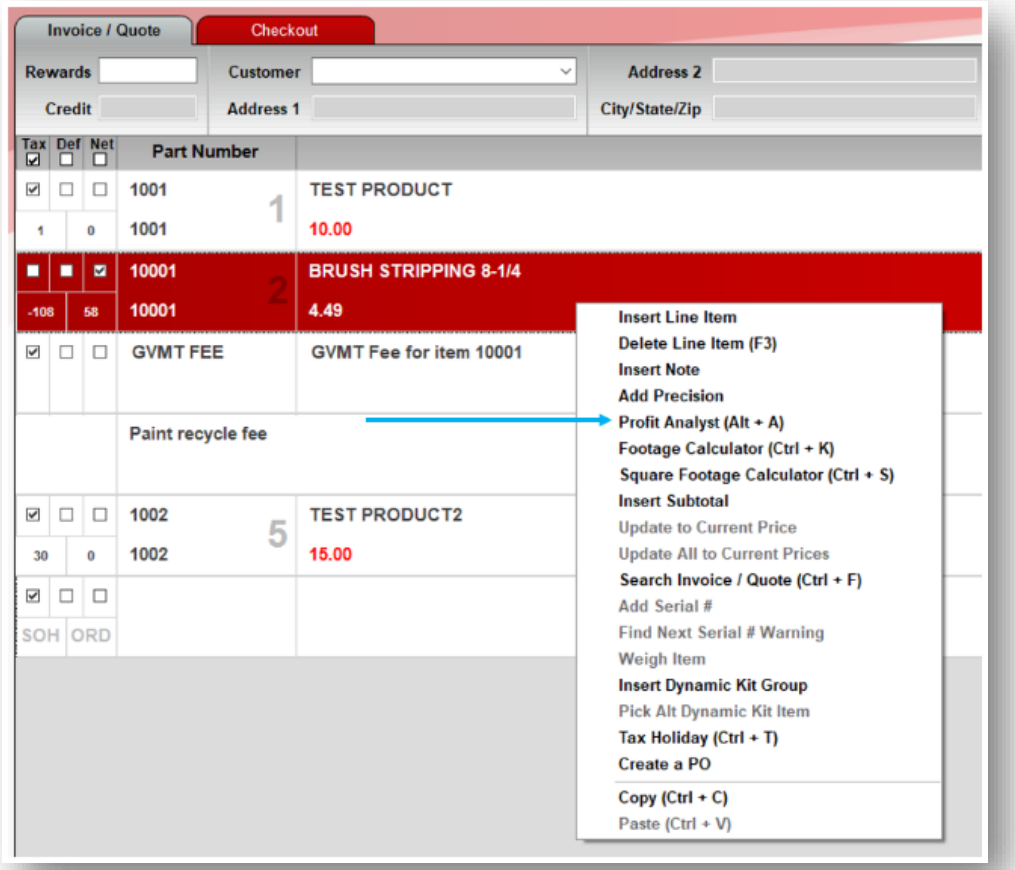
Client Experience Officer
January 9, 2024

WHAT YOU'LL LEARN

- Paladin Features
  - Profit analyst update
  - Electronic shelf labels
  - Multiple rewards programs
  - Cash discounting program
  - Missing serial numbers report
  - Remote stock check additions
  - Project payment management enhancement
  - Buy down quote pick list report
  - Newer “Invoice(store)” options and settings
  - A few things to look for in the immediate future

Profit analyst update



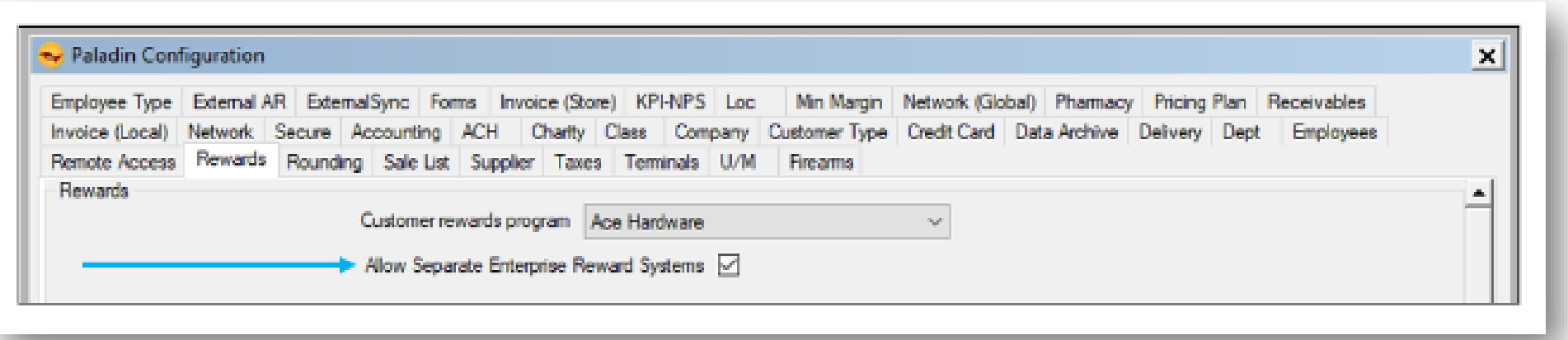
- Profit Analyst lets you view average cost and market cost profits and margins for any line item in an invoice or quote along with the invoice or quote total.
- As changes are made on the invoice, Profit Analyst displays the resulting margin and profit values. All values are pre-tax (subtotal) values.

Electronic shelf labels

- SES-imagotag is a specialist in electronic shelf labeling (ESL) systems.
- Integrating Paladin with SES-imagotag's electronic shelf label system, product pricing is automatically updated whenever a price is changed in Paladin.
- Paladin's price is:
  - One-Time Fee: $249
  - Monthly Fee: $29

Multiple rewards programs

- Multi-store businesses can have more than one customer rewards program.
- Paladin now allows these stores to offer more than one rewards program.
- Contact Paladin support if you are interested in enabling this feature.



Cash discounting program

- Simply stated, a cash discount payment program offers the consumer a lower price on all items when they pay cash.
- Customers paying with a credit card (Debit Cards not included) will be charged a fee to help offset the merchant's payment processing fees.
- Merchants are responsible for verifying the legality of this program in their geographical location or municipality.

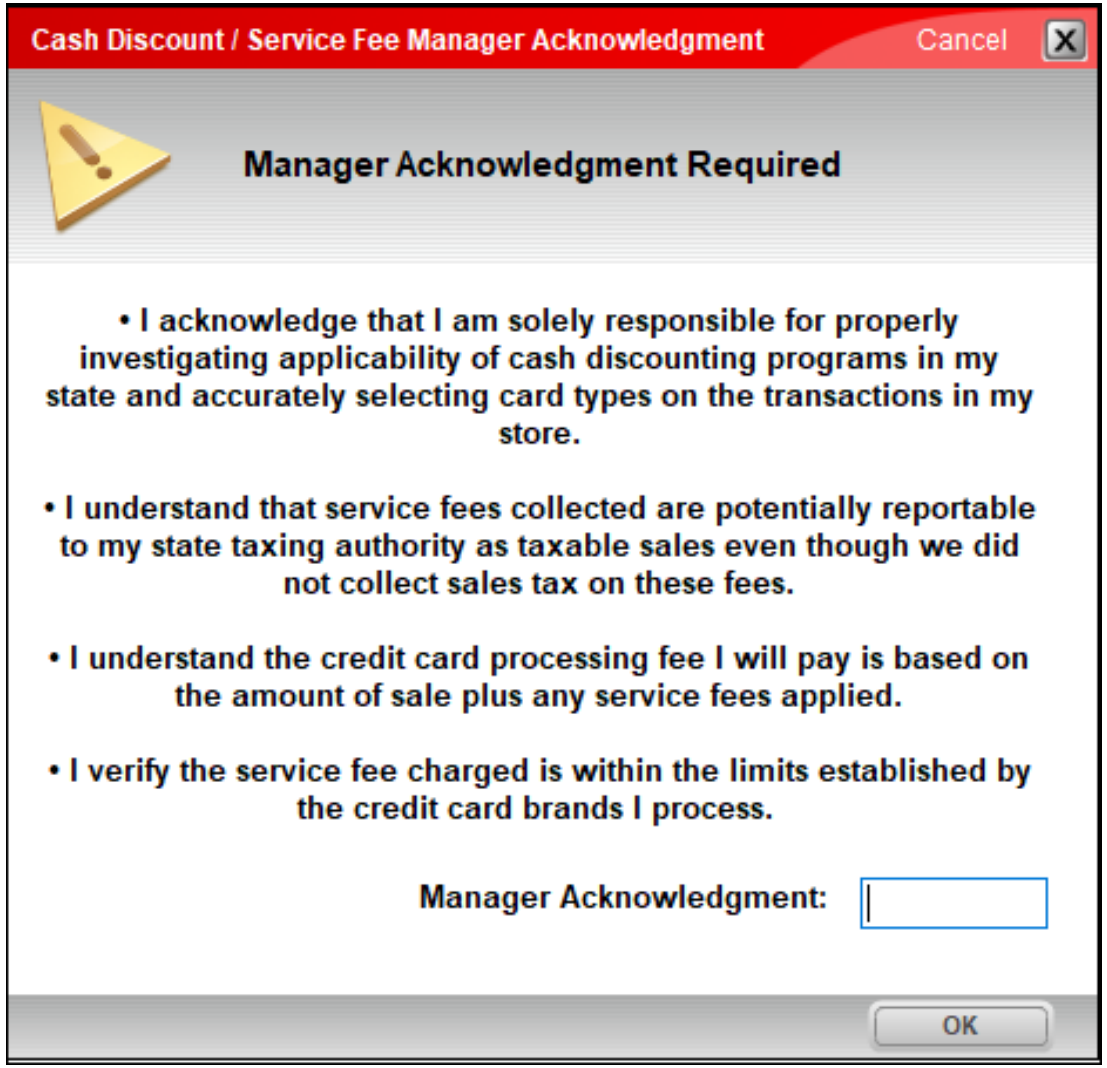
Cash discounting program (cont'd)

How Internal Cash Discount works

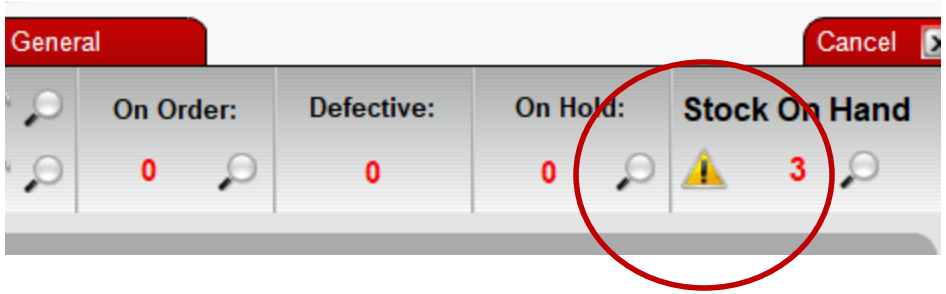
- When setting up Internal Cash Discount, a service fee will be added to every invoice. Paladin limits the configurable percentage rate to a maximum up to 3%. If payment is cash or a cash equivalent (charge, check, debit card, coupons, or gift card), the percentage you set will be discounted off the invoice as a cash discount.
- **Important**: You are solely responsible for properly investigating applicability of cash discounting programs in your state, getting an agreement that the service fee charged is within the limits established by the credit card brands you process, as well as any signage required in your store by the card brands. Lastly, it is the cashier's responsibility to accurately determine and select the card types on the transactions (debit or credit) in your store(s).

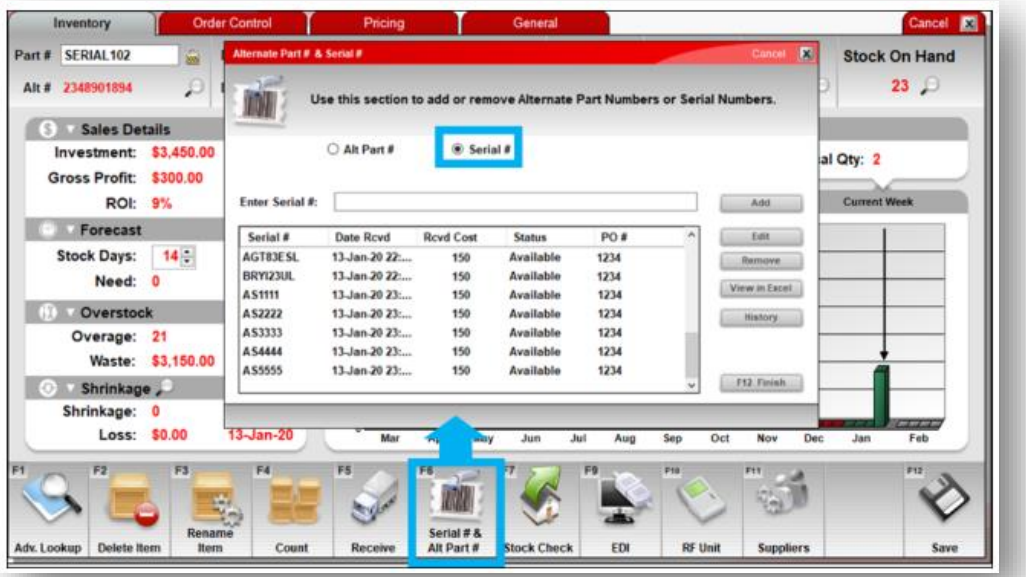
Cash discounting program (cont'd)

- Manager Acknowledgement is required.



Missing serial numbers report





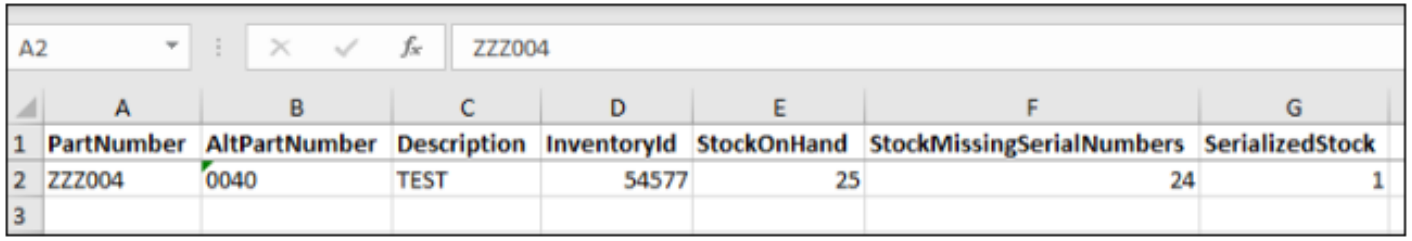
- Serial numbers are typically used for high-value products, such as power equipment, chainsaws, power tools, firearms, and appliances.
- When serialized products are added to the inventory without serial numbers, a caution symbol is presented left of the SOH number.
- The **Missing Serial Number** Excel report will provide a list of all serialized products that do not contain a serial number.

Missing serial numbers report (cont'd)

To access this report/spreadsheet:

1. In Paladin, from the top ribbon, select the **Reports** module.
2. In the **Report Area** pane, select **Inventory > General**.
3. In the **Report List** pane, select **Missing Serial Numbers**.
4. In the **Choose Report** pane, click **F12 Next**.
5. In the **Missing Serial Numbers** window, in the **Sorting Options** pane, click **F12 Run Report**.

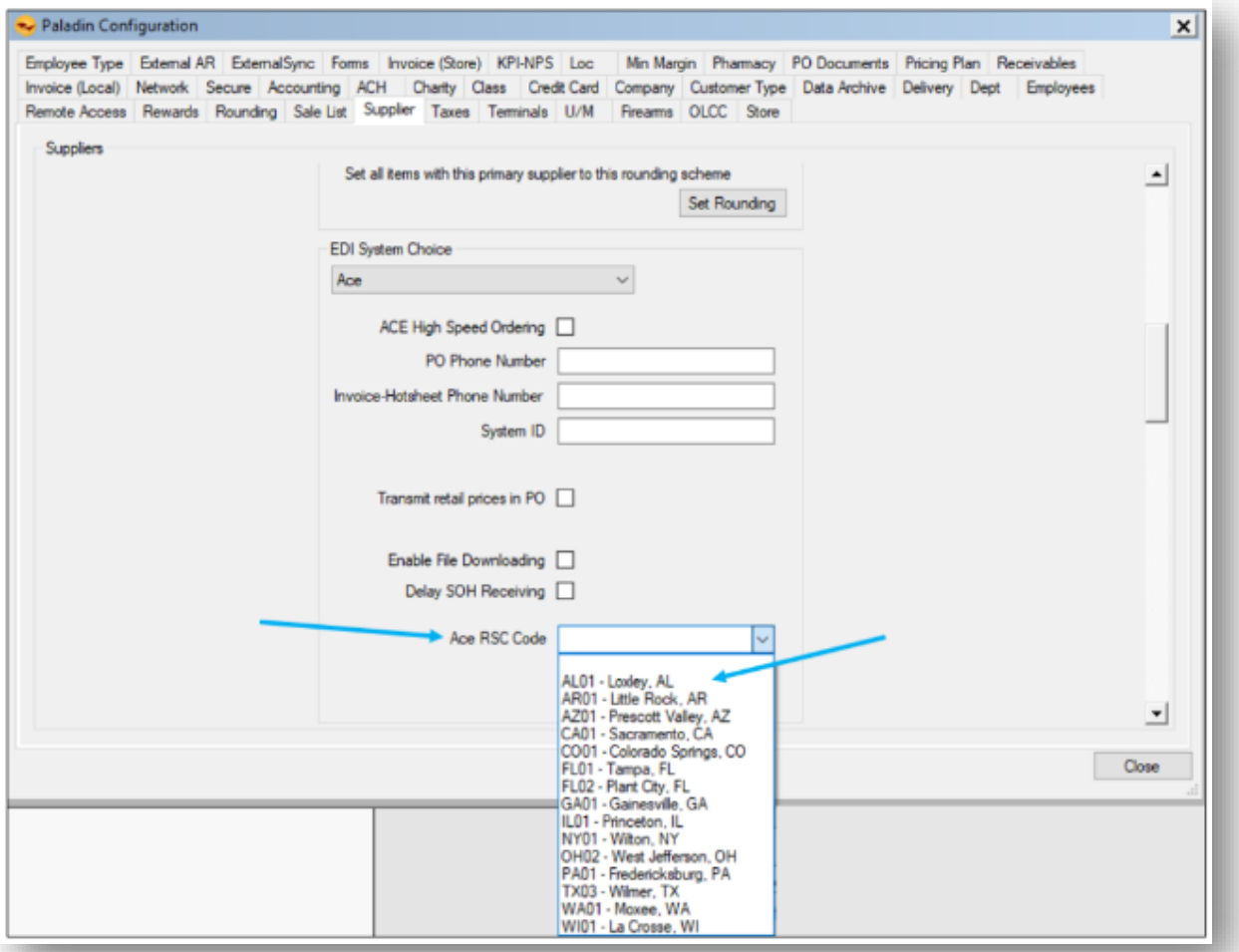
- This report shows part number, alt part number, description, and amount of SOH that is and is not serialized.



A2 | ZZZ004

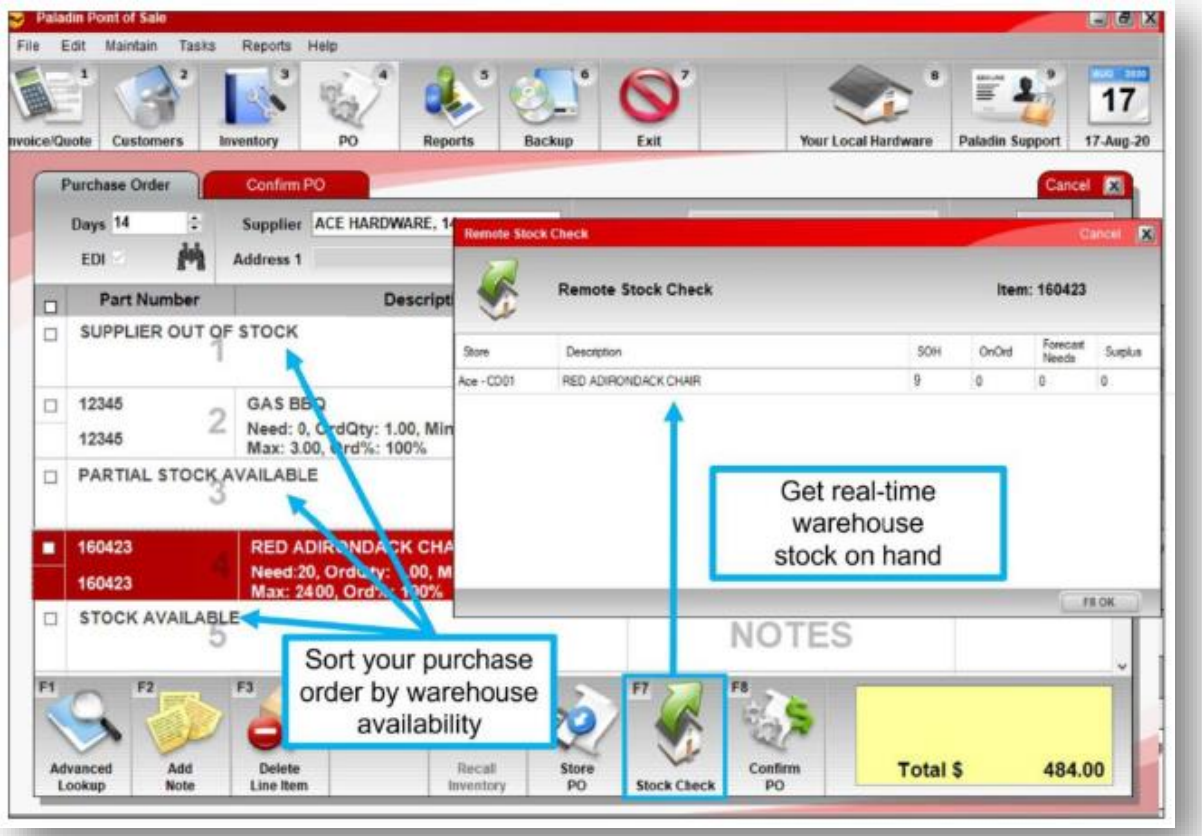
	A	B	C	D	E	F	G
1	PartNumber	AltPartNumber	Description	InventoryId	StockOnHand	StockMissingSerialNumbers	SerializedStock
2	ZZZ004	0040	TEST	54577	25	24	1
3							

Remote stock check (RSC)



- Paladin's **Remote Stock Check** (RSC) or (**Transfer** for m/s) feature provides:
  - Remote stock on hand (SOH) availability directly from the supplier's warehouse.
  - Shows what's available and what's out of stock when generating purchase orders.
  - Ability to adjust order quantities before submitting the purchase order.
  - More efficient ordering process / no more supplier portal inventory SOH look ups.
- It's currently available for the following suppliers: **Ace Hardware, Buttery, Do it Best, Emery-Jensen (EJD), Orgill, True Value and Wallace Hardware**.

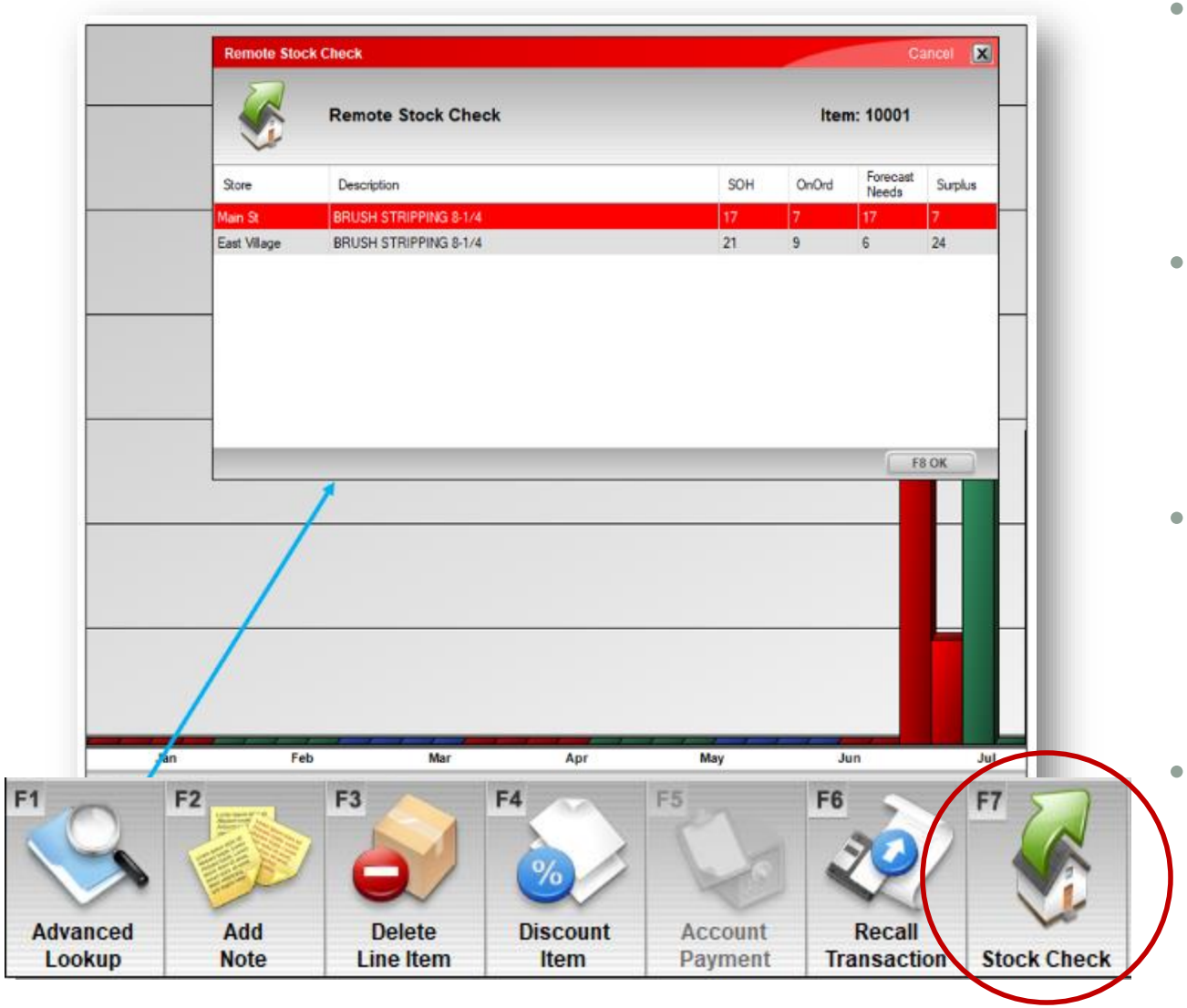
Remote stock check (RSC) (cont'd)



- RSC uses the existing **Stock Check** or **Transfer** (multi-store) feature on the bottom ribbon in Paladin's **Invoice/Quote, Inventory,** and **PO modules.**
- *RSC lets you sort purchases by warehouse availability and delivers near real-time warehouse stock on hand results.

*SOH refresh time periods vary based on supplier restrictions and warehouse ERP limitations.

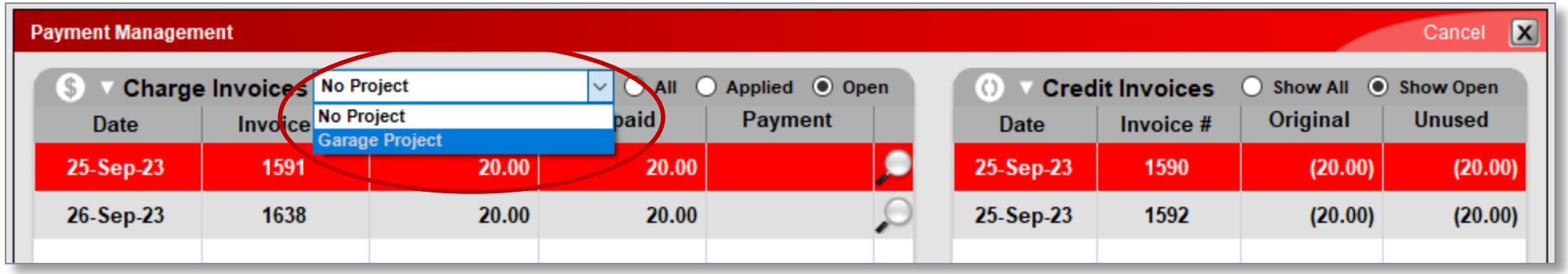
Remote stock check (RSC) (cont'd)



- To use this feature, select the module you want to work in - **Invoice/Quote**, **Inventory**, or **PO**.
- Enter a part number in the **Part Number** or **Part #** box and highlight the item you wish to inquire about.
- On the bottom ribbon of the module, select (**F7) Stock Check** or **(F7) Transfer** for multi-stores.
- The **Remote Stock Check** window opens, and the results are displayed.

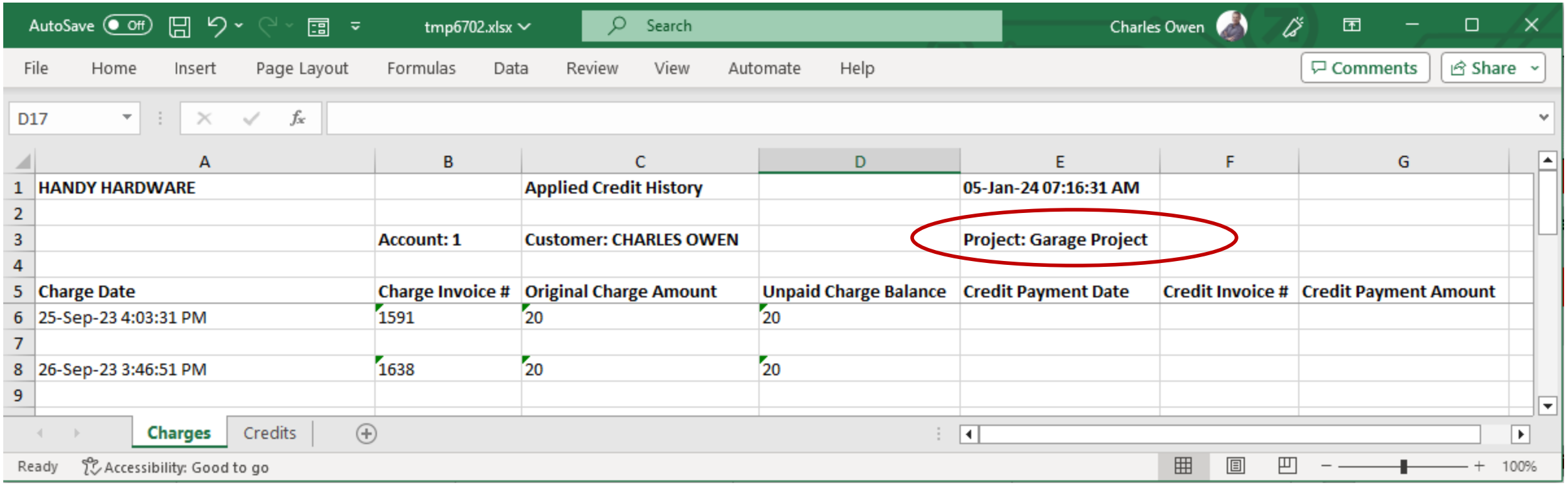
Project payment management

- Any store that sells to contractors – builders, electricians, plumbers, or painters – juggles orders and credits for different jobs/projects.
- Paladin's payment management feature helps stores effectively apply payments to a customer's various projects.
- In the **Customer Module** for charge accounts set to "**Open Item**", select **Payment Management** and choose a project. This will show all invoices paid and unpaid for each project. Payments can easily be associated with the appropriate charge invoice.



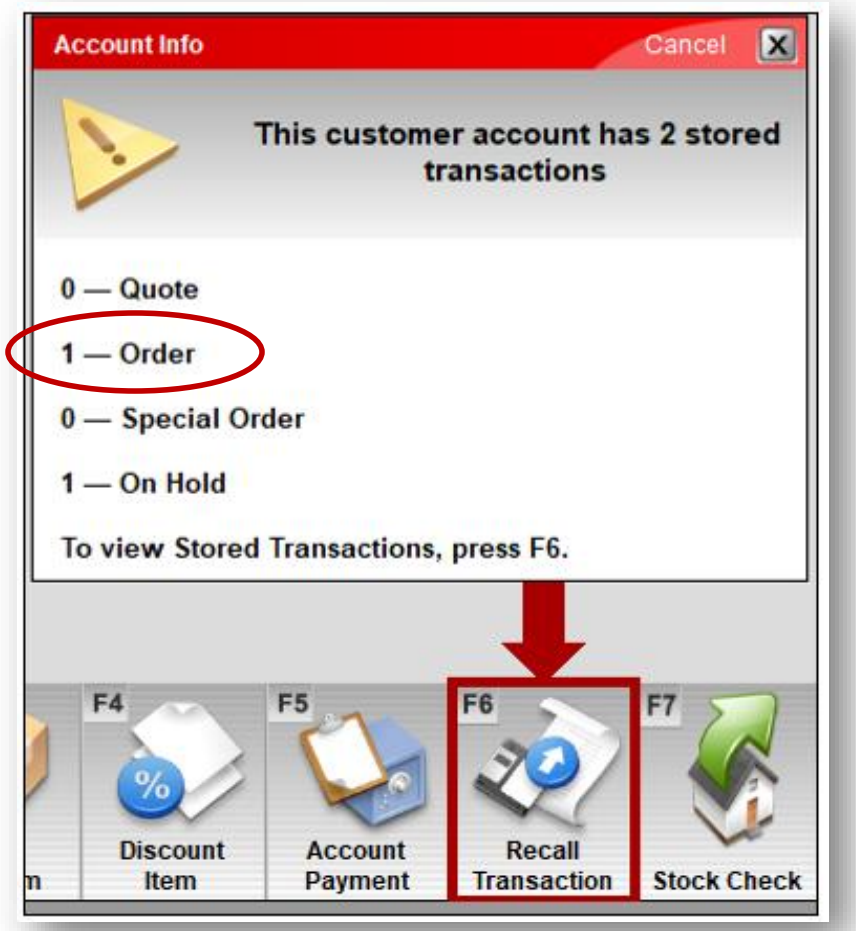
Project payment management (cont'd)

- To see a list of applied credit history per project, under **Payment Management** select the Applied Payment History button.



	A	B	C	D	E	F	G
1	HANDY HARDWARE		Applied Credit History		05-Jan-24 07:16:31 AM		
2							
3		Account: 1	Customer: CHARLES OWEN		Project: Garage Project		
4							
5	Charge Date	Charge Invoice #	Original Charge Amount	Unpaid Charge Balance	Credit Payment Date	Credit Invoice #	Credit Payment Amount
6	25-Sep-23 4:03:31 PM	1591	20	20			
7							
8	26-Sep-23 3:46:51 PM	1638	20	20			
9							

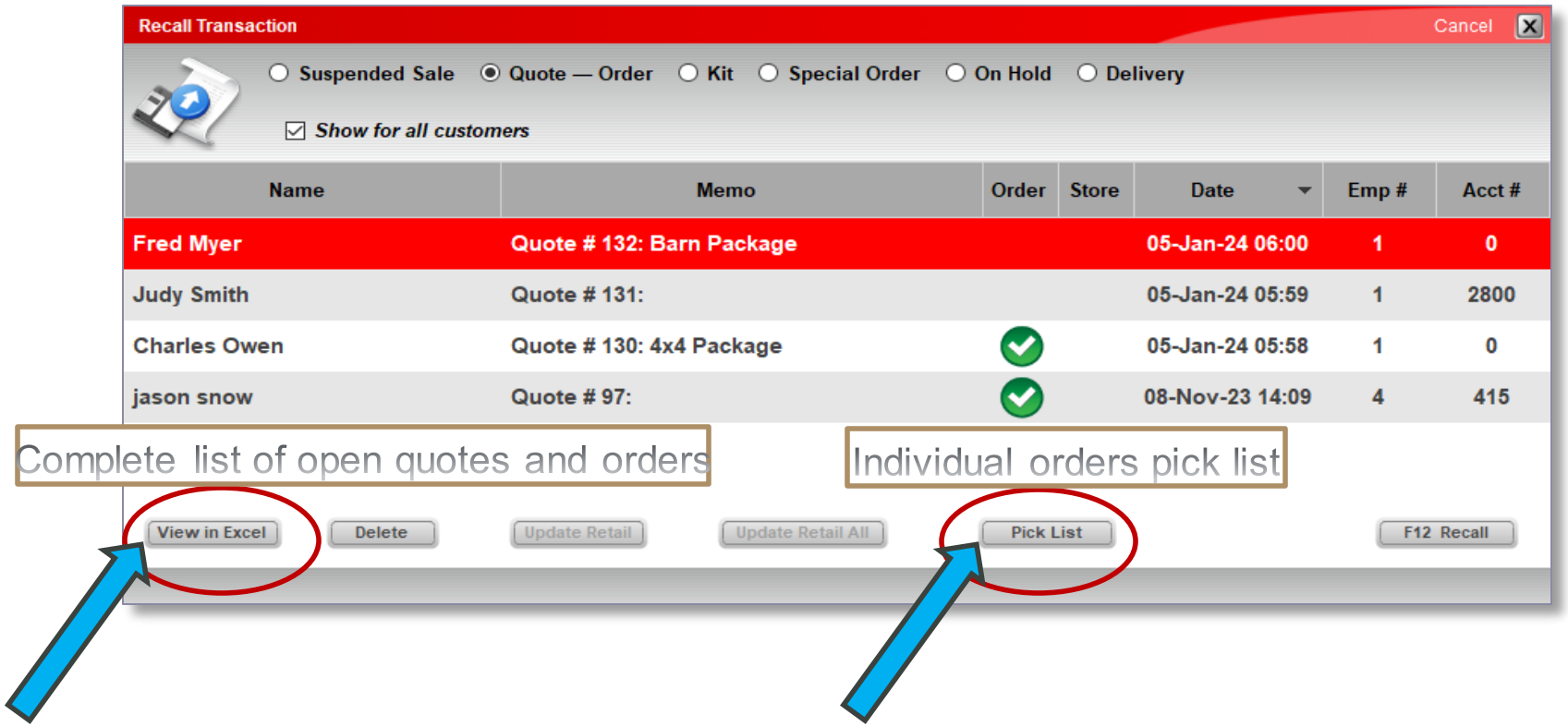
Buy down quote pick list report



- The **Order Manager**/Buy Down Quote report is in an Excel format generated in Paladin's **Invoice/Quote** module.

1. In Paladin, on the top ribbon, select the **Invoice/Quote** module.
2. Enter or select the **customer account** from the **Customer** list.
3. Press **F6 Recall Transaction** to display a list of stored quotes and/or orders.

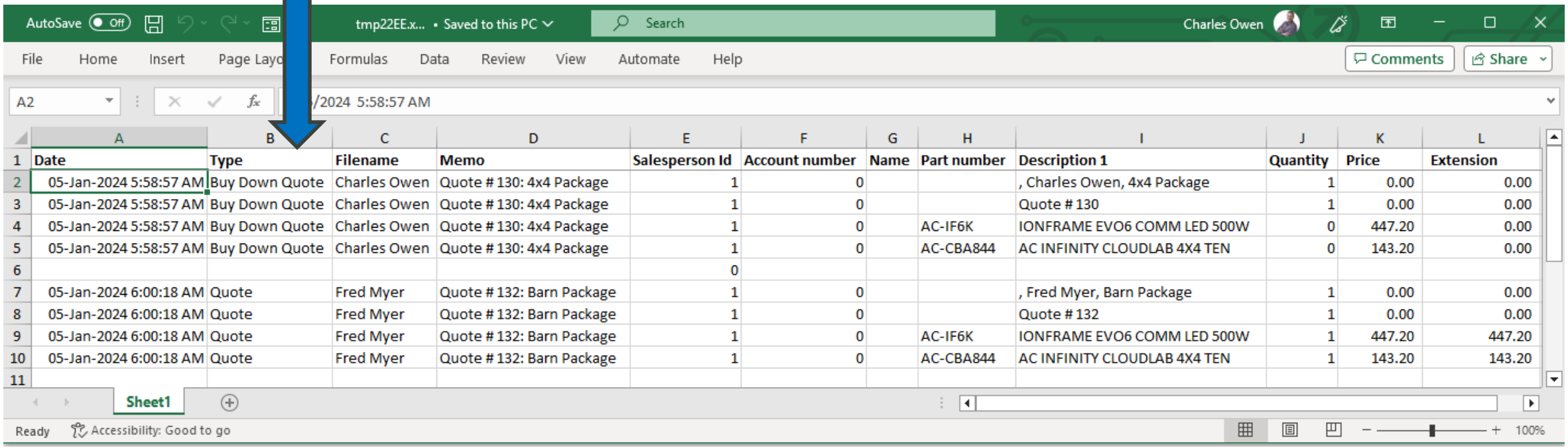
Buy down quote pick list report (cont'd)



- In Paladin, under the "**Recall Transaction**" window, select the **View in Excel** button to generate a report of all open quotes and buy down quotes/orders.
- Select the **Pick List** button to generate an individual pick list for each specific order.

Buy down quote pick list report (cont'd)

- The following report is generated.
- Notice the **Orders** are shown as **Buy Down Quotes,** and the **Quotes** are categorized as **Quote** in the Column B "Type" column.



AutoSave Off | tmp22EE.x... • Saved to this PC | Search | Charles Owen

File Home Insert Page Layo Formulas Data Review View Automate Help | Comments | Share

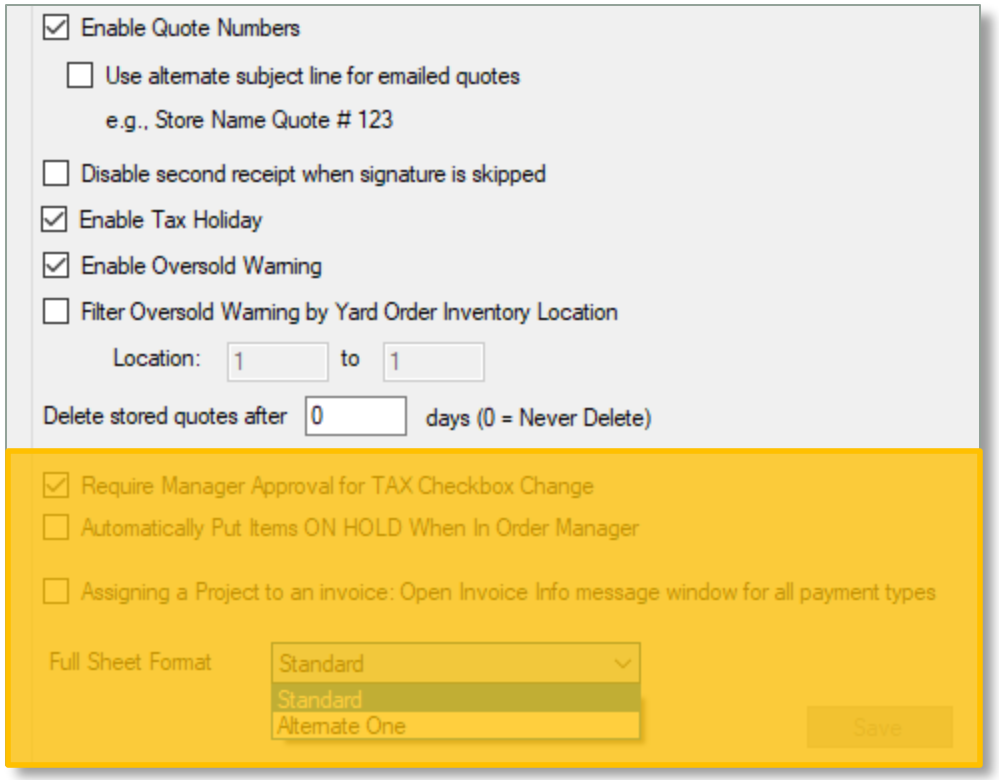
A2 /2024 5:58:57 AM

	A	B	C	D	E	F	G	H	I	J	K	L
1	Date	Type	Filename	Memo	Salesperson Id	Account number	Name	Part number	Description 1	Quantity	Price	Extension
2	05-Jan-2024 5:58:57 AM	Buy Down Quote	Charles Owen	Quote # 130: 4x4 Package	1	0			, Charles Owen, 4x4 Package	1	0.00	0.00
3	05-Jan-2024 5:58:57 AM	Buy Down Quote	Charles Owen	Quote # 130: 4x4 Package	1	0			Quote # 130	1	0.00	0.00
4	05-Jan-2024 5:58:57 AM	Buy Down Quote	Charles Owen	Quote # 130: 4x4 Package	1	0		AC-IF6K	IONFRAME EVO6 COMM LED 500W	0	447.20	0.00
5	05-Jan-2024 5:58:57 AM	Buy Down Quote	Charles Owen	Quote # 130: 4x4 Package	1	0		AC-CBA844	AC INFINITY CLOUDLAB 4X4 TEN	0	143.20	0.00
6					0							
7	05-Jan-2024 6:00:18 AM	Quote	Fred Myer	Quote # 132: Barn Package	1	0			, Fred Myer, Barn Package	1	0.00	0.00
8	05-Jan-2024 6:00:18 AM	Quote	Fred Myer	Quote # 132: Barn Package	1	0			Quote # 132	1	0.00	0.00
9	05-Jan-2024 6:00:18 AM	Quote	Fred Myer	Quote # 132: Barn Package	1	0		AC-IF6K	IONFRAME EVO6 COMM LED 500W	1	447.20	447.20
10	05-Jan-2024 6:00:18 AM	Quote	Fred Myer	Quote # 132: Barn Package	1	0		AC-CBA844	AC INFINITY CLOUDLAB 4X4 TEN	1	143.20	143.20
11												

Sheet1

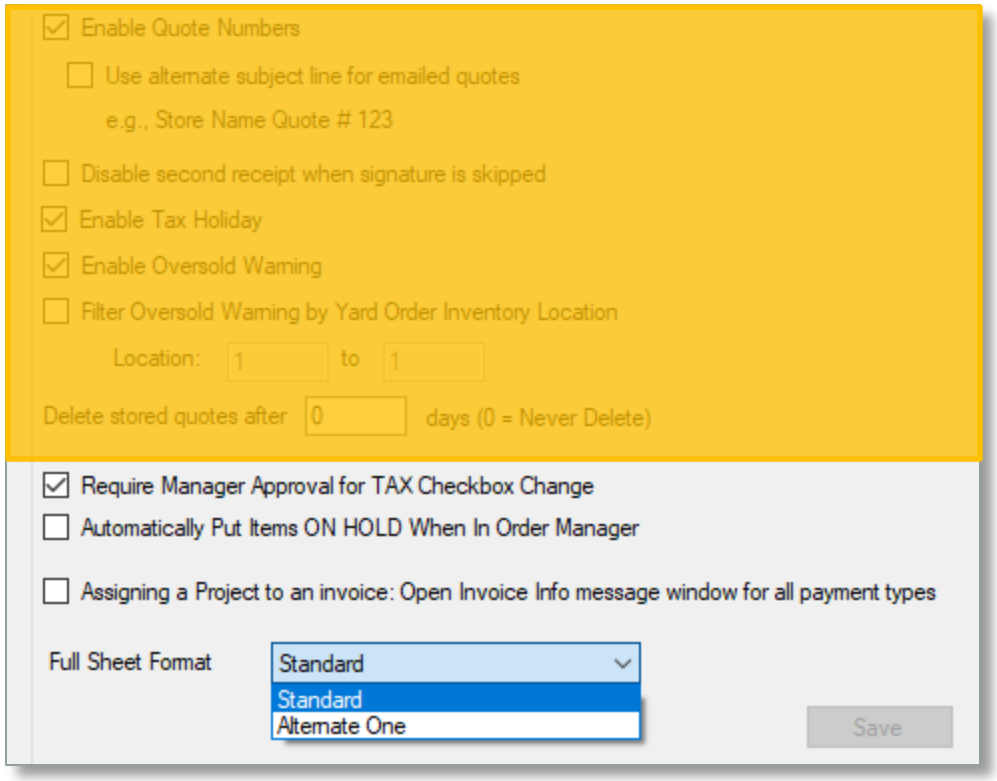
Ready Accessibility: Good to go 100%

Newer "Invoice(Store)" options and settings



- In Paladin, on the top ribbon, select **File → Setup → Invoice(Store)** tab.
- Recent additions:
  - Enable Quote Numbers – Use alternate subject line for emailed quotes. Instead of seeing the subject line as "Invoice" it will include the Store Name and Quote#.
  - Enable Tax Holiday - Partial tax-free sales
  - Enable Oversold Warning – Filter oversold warning by Yard Order Inventory location.
  - Delete stored quotes after x# days (0=Never Delete)

Newer "Invoice(Store)" options and settings (cont'd)

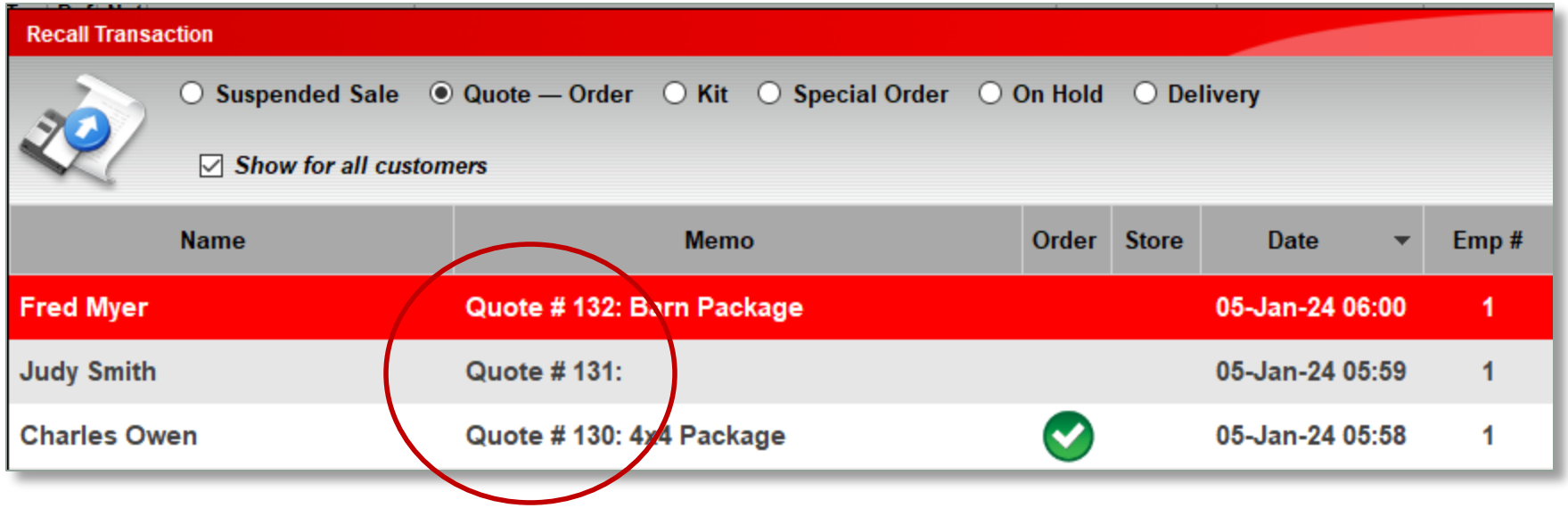


- In Paladin, on the top ribbon, select **File → Setup → Invoice(Store)** tab.
- Recent additions continued:
  - Require Manager Approval for TAX Checkbox Change. – At Invoice/Quote when selecting part number and unclicking the TAX checkbox.
  - Automatically put items ON-HOLD when in Order Manager. – When converting Quotes to Orders quantity specified on the order will be converted to On-Hold from inventory stock on hand (SOH).
  - Assigning a Project to an Invoice: Open Invoice Info message on all payment types. – Spawns the Invoice Information box to add PO/Memo, Authorized Signer, and Project Name to each invoice for AR customers.
  - Full Sheet Format – Alternate full-page format.

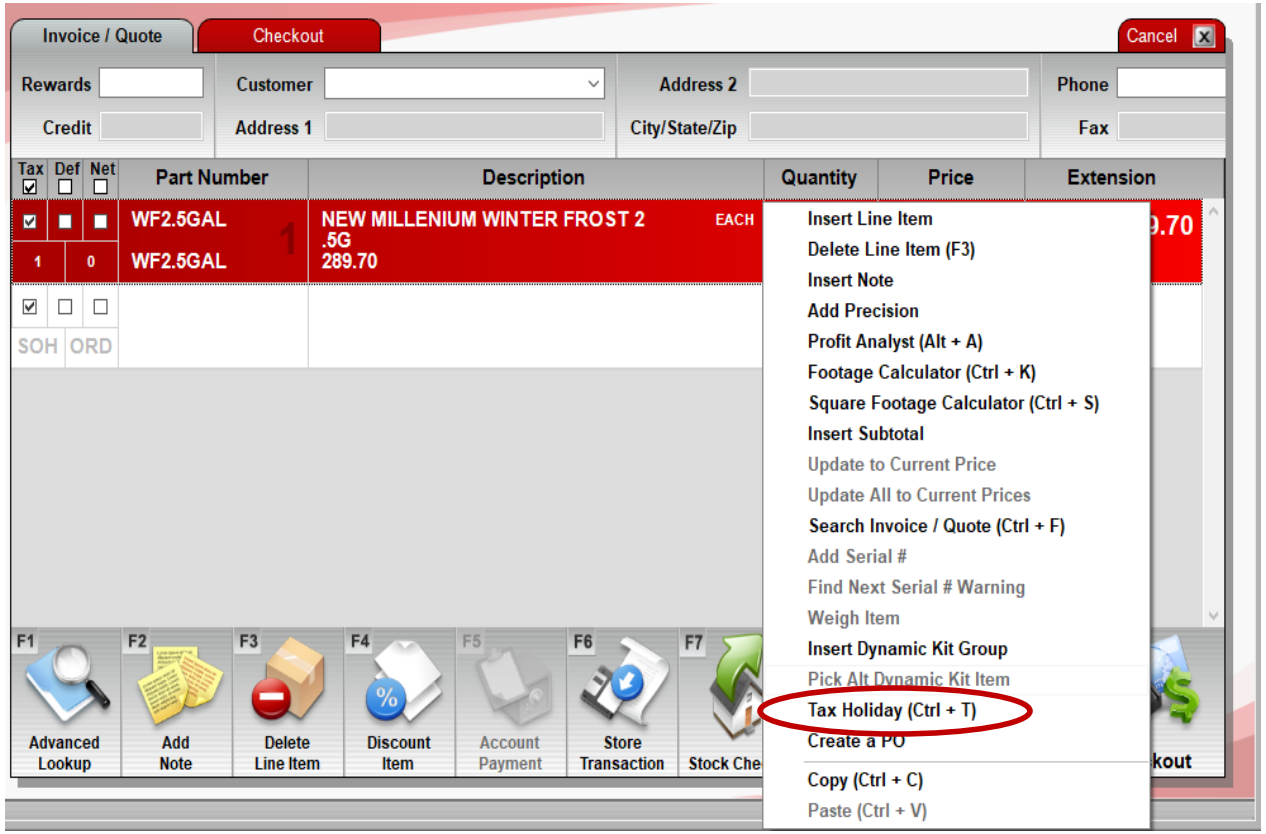
Newer “Invoice(Store)” options and settings (cont’d)

Enable Auto Quote Numbers

- Quote numbers are automatically added into the Memo field when saved as a quote.
- The quote numbers are passed onto On-Holds and Orders if moved from Quote status.
- The quote numbers are sequential and shown on the invoice as well.
- Optionally use alternate subject line for emailed quotes. Instead of seeing the subject line as “Invoice” it will include the Store Name and Quote#.



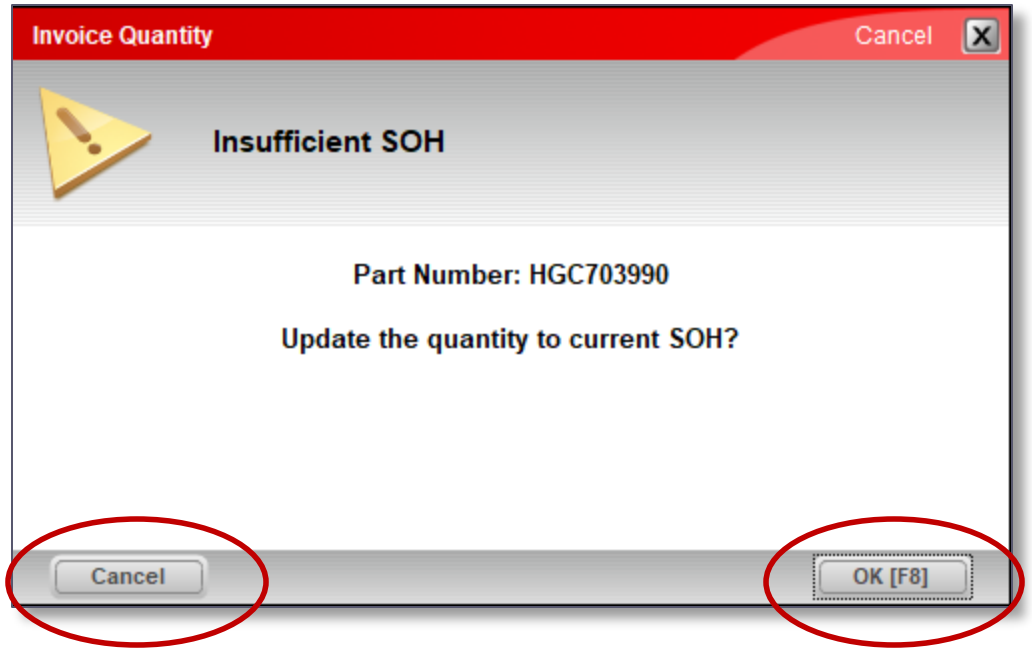
Newer "Invoice(Store)" options and settings (cont'd)



Tax Holiday

- In the **Invoice/Quote** module, right click on the item and select **Tax Holiday** or press the **(Ctrl T)** key combination.
- Then enter the amount of the line item that will be sold without sales tax.
- Press "**Apply**" and complete the sale.
- The **Comparative Revenue Report** will itemize the Tax holiday amounts.

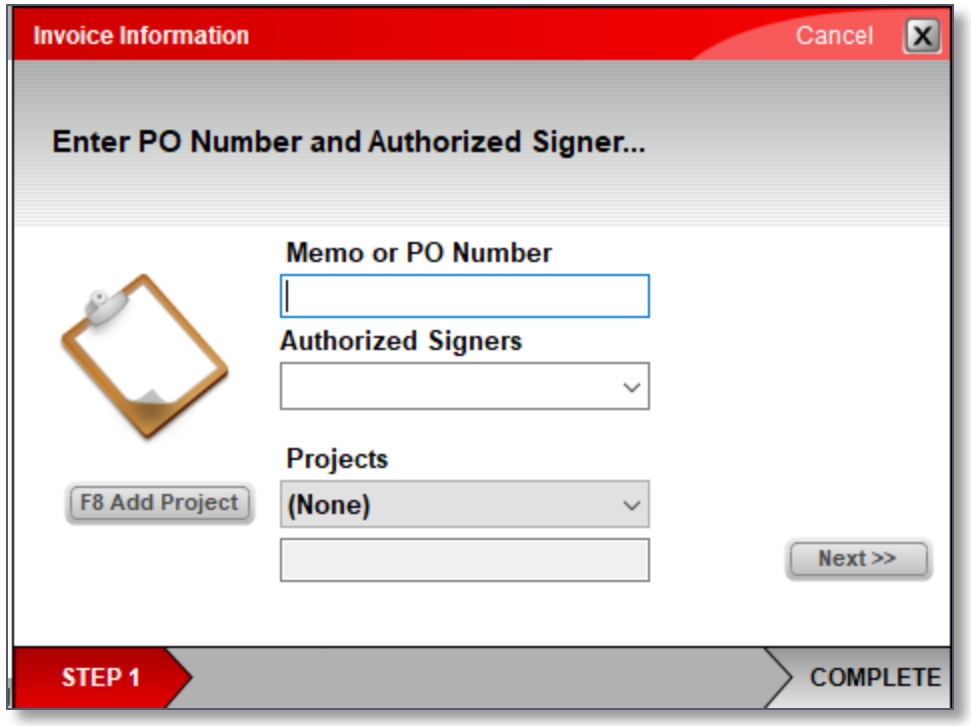
Newer “Invoice(Store)” options and settings (cont’d)



Oversold Warning

- In the **Invoice/Quote** module, if an amount is entered with a quantity lower than the amount available in the Inventory, an **Insufficient SOH** warning will appear.
- This warning can be suppressed by selecting the **Cancel** button or it may be accepted by pressing the **OK [F8]** button.

Newer “Invoice(Store)” options and settings (cont’d)



Assigning PO’s and Projects to all payment types

- Assigning a Project to an Invoice presents this Invoice Information box to all payment types for all charge account customers.
- Allows you to add **PO/Memo, Authorized Signer,** and **Project Name** to each invoice regardless of payment type.

A few things to look for in the immediate future

Coming soon…

- Stored documents
- RF Gun redesign/enhancements
- Third generation mobile products

Learn More

To learn more, see the following resources in our Help Portal

- Profit Analyst
- Electronic shelf labels
- Missing serial numbers report
- Remote Stock Check additions
- Project payment management

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

Save the date
Next Webinar

January 30 9am PT

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