



New Void functionality

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WHAT YOU'LL LEARN

- Reason for the change to the Void feature
- New Void functionality
- Legacy Void
- Availability

Reason for the change to the Void feature




- Today's financial accountability requirements for business, place a greater responsibility on store owners to maintain detailed records.
- Voiding invoices is a common method of hiding evidence that someone is stealing from their employers. Naturally, we wanted to close this possible vulnerability.
- Numerous businesses requested the void feature be 'tightened up' so point of sale records always match what is uploaded to their general ledger.

Formerly just the Void button now reads

Status: Active Customer: 382 - TOM KAZANSKY Address 2: State: CA

Rewards: Address 1: 2258 Mitscher Way City: San Diego Zip: 92145

Recent Sales History Cancel X

Projects: All Show Inactive Projects F1  Results

Date	Employee	Term.	Inv #	PO #	Total	Balance	Pmt Type
28-Oct-24 07:01	Paladin Support	17	26436		\$72.20	\$0.00	CASH

Edit / Void Report Email Done

There are two options for this invoice once you select the button

Invoice Edit / Void ✕

Use this feature to edit an account #, PO/memo, authorized signer, and/or project name.
This feature also allows users to void a transaction.

Customer

Address 1 Address 2

City State Zip

PO/Memo

Authorized Signer

Project

You are about to edit/void this transaction. Ensure that you have reviewed all details carefully before proceeding.

[Learn More](#) ⓘ



UPDATE

- Many times, an existing invoice could be edited rather than voiding it because of a mistake.
- Paladin allows properly credentialed individuals to change the account the invoiced was sold under, the authorized signer and/or the project name.
- Why void an invoice and then manually recreate it?

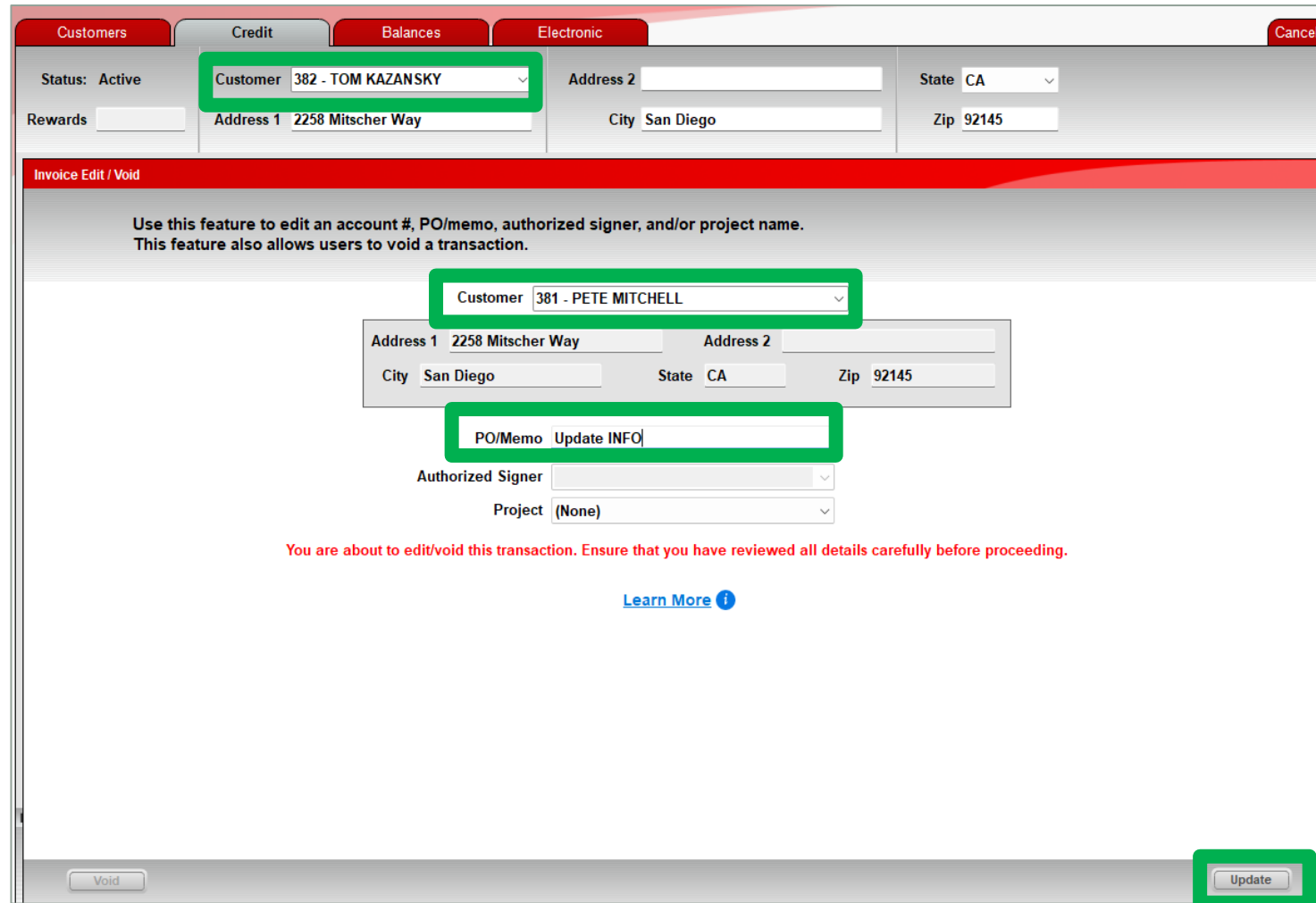
This screen allows the user to change the details on the selected invoice

Use this feature to edit an account #, PO/memo, authorized signer, and/or project name.
This feature also allows users to void a transaction.

Customer	382 - TOM KAZANSKY		
Address 1	2258 Mitscher Way	Address 2	
City	San Diego	State	CA
		Zip	92145
PO/Memo			
Authorized Signer			
Project	(None)		

You are about to edit/void this transaction. Ensure that you have reviewed all details carefully before proceeding.

If any field is changed, the Void button becomes inactive and the Update button becomes active



The screenshot displays a software interface for updating an invoice. At the top, there are tabs for 'Customers', 'Credit', 'Balances', and 'Electronic', with a 'Cancel' button on the right. The main form area is titled 'Invoice Edit / Void' and contains the following fields:

- Status: Active
- Customer: 382 - TOM KAZANSKY (highlighted in green)
- Address 1: 2258 Mitscher Way
- City: San Diego
- State: CA
- Zip: 92145
- PO/Memo: Update INFO (highlighted in green)
- Authorized Signer: (empty)
- Project: (None)

Below the form, a red warning message states: "You are about to edit/void this transaction. Ensure that you have reviewed all details carefully before proceeding." A blue 'Learn More' link is provided. At the bottom, there are two buttons: 'Void' (inactive) and 'Update' (highlighted in green).

If none of the fields are changed, only the Void button is active

Invoice Edit / Void

Use this feature to edit an account #, PO/memo, authorized signer, and/or project name.
This feature also allows users to void a transaction.

Customer 382 - TOM KAZANSKY

Address 1 2258 Mitscher Way Address 2

City San Diego State CA Zip 92145

PO/Memo

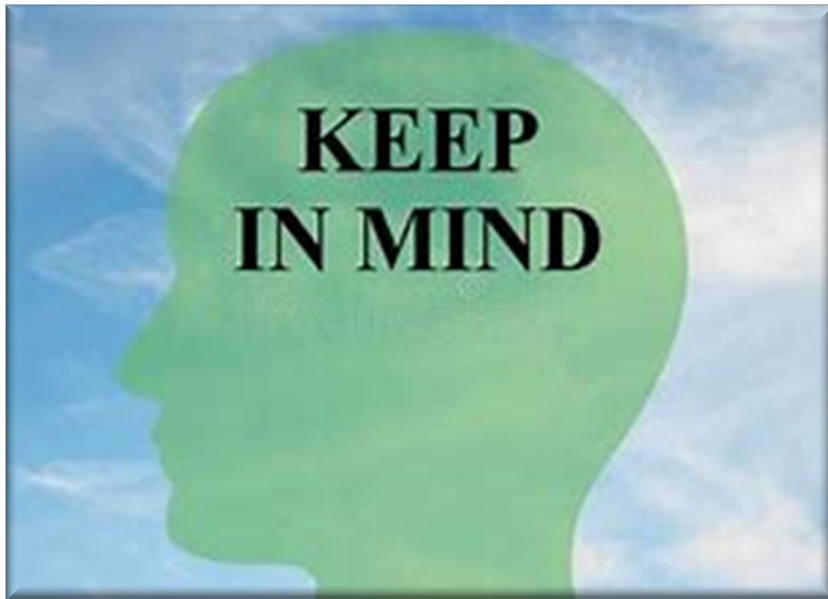
Authorized Signer

Project (None)

You are about to edit/void this transaction. Ensure that you have reviewed all details carefully before proceeding.

[Learn More](#)

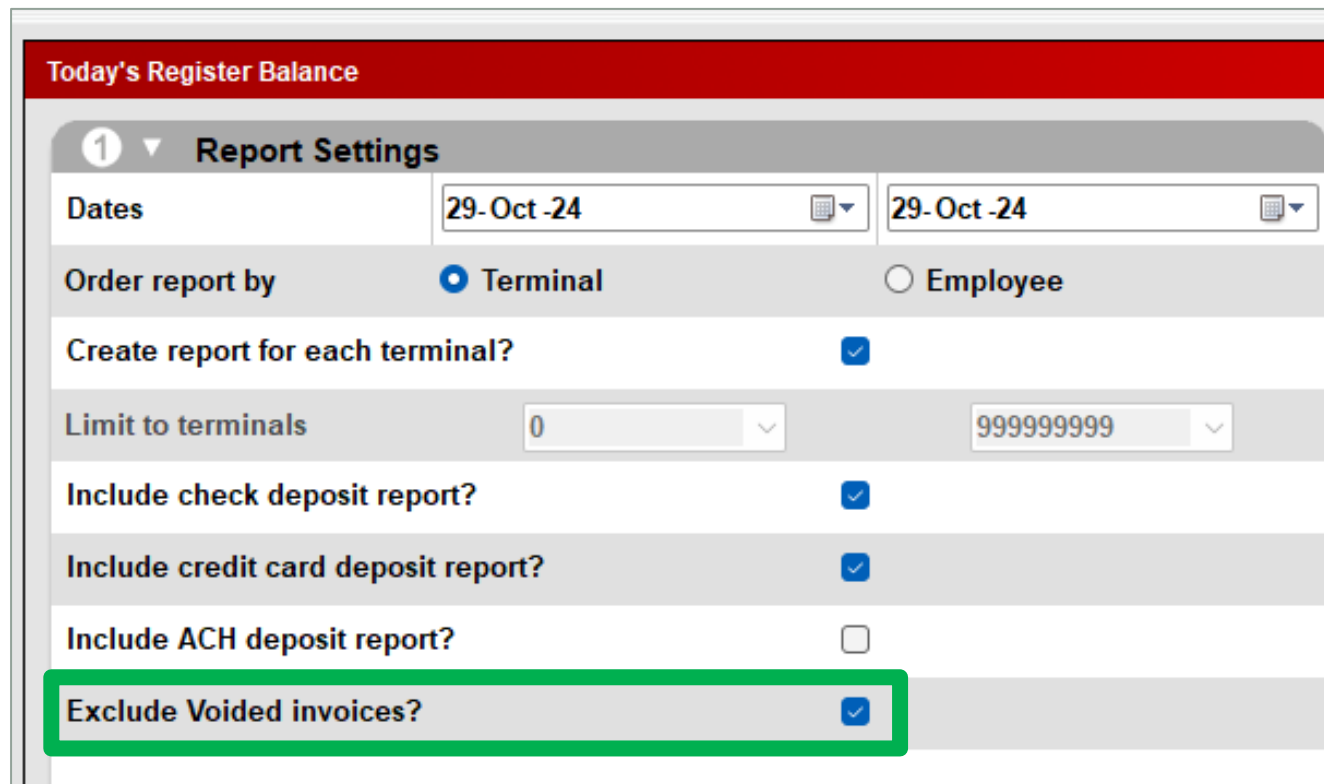
Void Update



- The new default functionality of the Void command features an “undoing” or reversal of a prior invoice including refund of payment types keeping all financial records intact and in sync with your general ledger.
- Sales paid by credit card will automatically be refunded if you are processing with one of our integrated partners.
- Paladin recommends double checking to make sure the voided credit card transaction was successfully processed in the payment processors portal after a void.

A new report selection option has been added to the Register Balance report settings menu.

The new option “Exclude Voiced invoices?” is checked by default



Today's Register Balance

1 Report Settings

Dates 29-Oct-24 29-Oct-24

Order report by Terminal Employee

Create report for each terminal?

Limit to terminals 0 999999999

Include check deposit report?

Include credit card deposit report?

Include ACH deposit report?

Exclude Voiced invoices?



The purpose of this option is to simplify the register balancing, but still provide a detail of all transactions in all other reports, including the revenue report and GL summary report.



- The new Void behavior is on by default.
- For better accountability, Paladin recommends using the updated Void behavior settings.
- If desired, you can return to the Legacy Void behavior – see next slide.

The new Edit/Void feature is currently available to all customers

Learn More

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

[Knowledge Base» Enhanced Voiding Invoices](#)

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

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