



Discover the Hidden Gems in Paladin

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WHAT YOU'LL LEARN

- Invoice/Quote Module
 - Right-click features
 - Copy/Paste long notes
- Latest additions to Invoice(Store) tab
 - Add quote numbers
- PO Module
- Inventory Module
- Stock Check – multiple store check
- Minimum Margin Protection
- Serialization
- Clearance Management
- Selling on Consignment
- Hidden reports

Invoice/Quote Module

Profit Analyst

Invoice / Quote			Checkout	
Rewards		Customer		
Credit		Address 1		
Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P1234	1 GALLON BASE 1 PAINT
341	0		P1234	25.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PB5678	
480	0		PB5678	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
SOH	ORD			



- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote (Ctrl + F)
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Insert Dynamic Kit Group
- Pick Alt Dynamic Kit Item
- Tax Holiday (Ctrl + T)
- Create a PO
- Add Managed Item
- Copy (Ctrl + C)
- Paste (Ctrl + V)

Profit Analyst Cancel			
<input checked="" type="radio"/> Average Cost <input type="radio"/> Market Cost			
Item	Cost	Profit	Margin
Current Line	\$131.400	\$48.60	27.0%
Invoice	\$138.620	\$56.04	28.8%

Invoice / Quote			Checkout	
Rewards		Customer 8101 - CHRIS HOLLIMAN		
Credit 350.00		Address 1 3515 HWY 1 S		
Tax	Def	Net	Part Number	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	533602	24" BAR TRE
-2	0		533602	180.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00001410300	PRE FILTER V
0	0		00001410300	3.85
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00000071601	SET OF GAS
0	0		00000071601	7.82
			Section 1 - Subtotal \$191.67	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	#3562	NOZZLE CAP
41	0		#3562	2.99

Insert Subtotal

- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote (Ctrl + F)
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Insert Dynamic Kit Group
- Pick Alt Dynamic Kit Item
- Tax Holiday (Ctrl + T)
- Create a PO
- Add Managed Item
- Copy (Ctrl + C)
- Paste (Ctrl + V)

Invoice Subtotal
Cancel

What do you want to name the subtotal?

Subtotal Name Section 1

Cancel
OK [F8]

Invoice / Quote

Checkout

Rewards

Customer

Credit

Address 1

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P1234	1 GALLON BASE 1 PAINT
341	0		P1234	25.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PB5678	
480	0		PB5678	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

SOH

ORD

Insert Line Item

Delete Line Item (F3)

Insert Note

Add Precision

Profit Analyst (Alt + A)

Footage Calculator (Ctrl + K)

Square Footage Calculator (Ctrl + S)

Insert Subtotal

Update to Current Price

Update All to Current Prices

Search Invoice / Quote (Ctrl + F)

Add Serial #

Find Next Serial # Warning

Weigh Item

Insert Dynamic Kit Group

Pick Alt Dynamic Kit Item

Tax Holiday (Ctrl + T)

Create a PO


Add Managed Item

Copy (Ctrl + C)

Paste (Ctrl + V)

Create a PO

Items added to Purchase Orders



Selected item(s) have been added to your Purchase Order(s)

1 item(s) added to new Purchase Order(s)

These Purchase Order(s) are now available for your review and approval.

OK

Update to Current Price(s)

Insert Line Item

Delete Line Item (F3)

Insert Note

Add Precision

Profit Analyst (Alt + A)

Footage Calculator (Ctrl + K)

Square Footage Calculator (Ctrl + S)

Insert Subtotal

Update to Current Price

Update All to Current Prices

Search Invoice / Quote (Ctrl + F)

Add Serial #

Find Next Serial # Warning

Weigh Item

Insert Dynamic Kit Group

Pick Alt Dynamic Kit Item

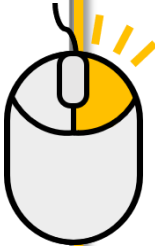
Tax Holiday (Ctrl + T)

Create a PO

Add Managed Item

Copy (Ctrl + C)

Paste (Ctrl + V)



Invoice / Quote

Checkout

Cancel

Rewards

Customer 8101 - CHRIS HOLLIMAN

Address 2

Phone 6628224190

Credit 350.00

Address 1 3515 HWY 1 S

City/State/Zip Greenville, MS, 38701

Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00000071601	SET OF GASKETS	1	\$ 7.82	\$ 7.82
0	0		00000071601	7.82			
Section 1 - Subtotal \$196.67							
							NOTES
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	#3562	NOZZLE CAP AND WASHER	1	\$ 2.99	\$ 2.99
41	0		#3562	3.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

- Updated prices display in blue ink to easily identify changes.
- With a click of the mouse the prices can be updated one at a time or all at once using the right-click feature.

Copy/Paste long notes

Insert Line Item
 Delete Line Item (F3)
 Insert Note
 Add Precision
 Profit Analyst (Alt + A)
 Footage Calculator (Ctrl + K)
 Square Footage Calculator (Ctrl + S)
 Insert Subtotal
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 Update All to Current Prices
 Search Invoice / Quote (Ctrl + F)
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 Insert Dynamic Kit Group
 Pick Alt Dynamic Kit Item
 Tax Holiday (Ctrl + T)
 Create a PO
 Add Managed Item
 Copy (Ctrl + C)
 Paste (Ctrl + V)



Invoice/Quote copy/paste

Invoice / Quote

Checkout

Rewards

Customer

Address 2

Credit

Address 1

City/State/Zip

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Lorem ipsum dolor sit amet, cu fugit simul adolescens
				qui, ut sensibus necessitatibus mei. Aliquid
				mnesarchum suscipiantur ut eos, quot oporteat ei
				cum. Nostro habemus concludaturque cum te,
				splendide evertitur voluptatum an vel. Usu

Printed quote or PO

ITEM	DESCRIPTION	QTY	SALE	U/M	EXT
#3590	15' BOOMLESS SPRAYER TIP	1.00	43.99	EA	43.99
	Lorem ipsum dolor sit amet, cu fugit simul adolescens				
	qui, ut sensibus necessitatibus mei. Aliquid				
	mnesarchum suscipiantur ut eos, quot oporteat ei				
	cum. Nostro habemus concludaturque cum te,				
	splendide evertitur voluptatum an vel. Usu				
	diceret facilisi ei, cum nisl vide intellegat				
	eu. Mei et invenire vituperata, an movet accusam				
	noluisse pri. Elitr graece vim ei. Mea zril				
	discere ut, sit ei civibus eloquentiam.				
I AGREE TO PAY THE ABOVE TOTAL ACCORDING TO THE POSTED TERMS AND CONDITIONS					

NOTES

NOTES

NOTES

- Notes can be automatically included on the purchase order and special orders

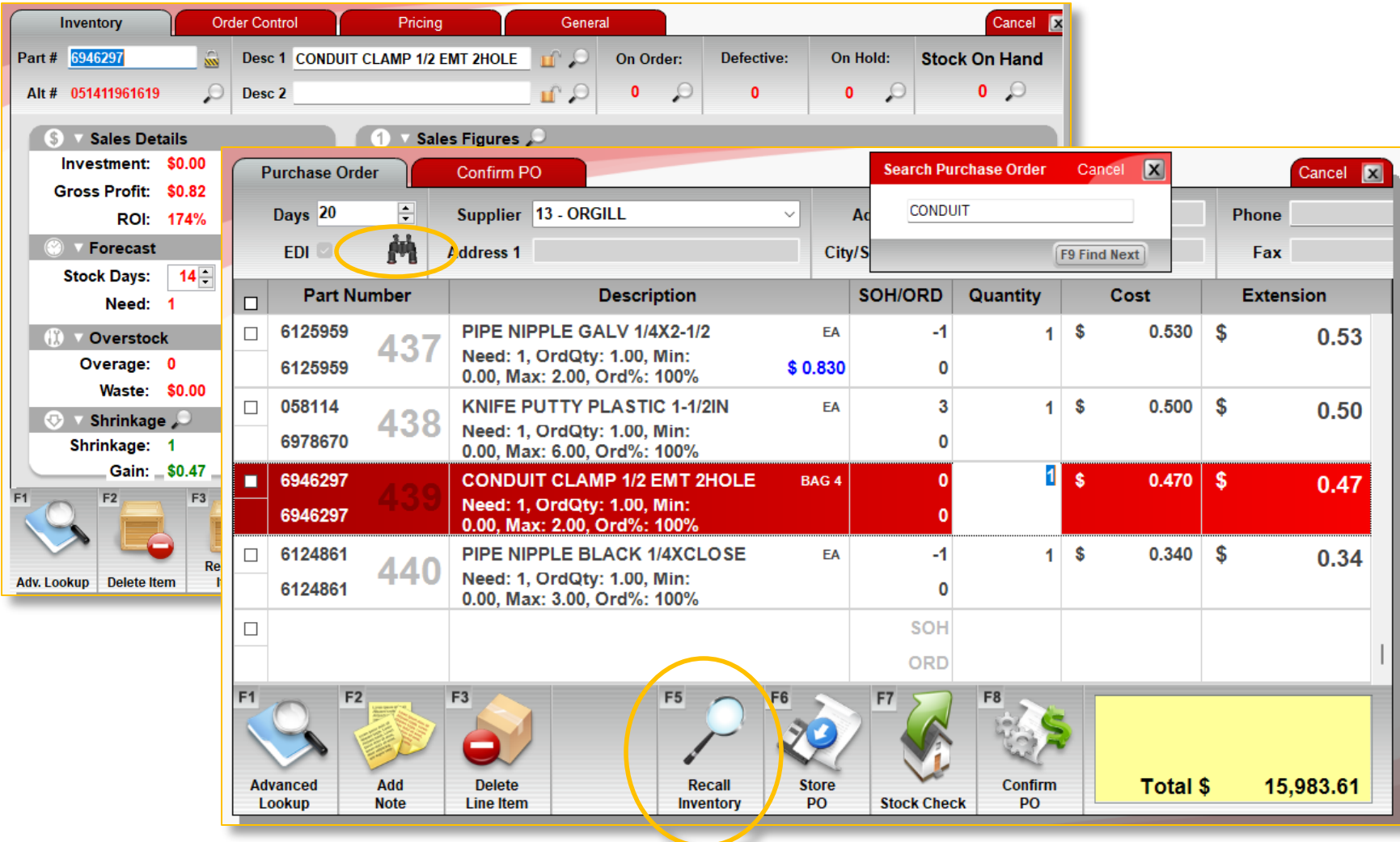
File→ Setup→ Invoice(Store) tab settings

Latest additions to: File→ Setup→ Invoice(Store) Settings

PO Module

PO Module

- These simple PO navigation tools are often missed:
 - Ctrl “F” or click on the binoculars image to search by part number, manufacture number, description 1 and 2, and by alternate part number.
 - F5 – Recall Inventory jumps straight to the inventory item selected.

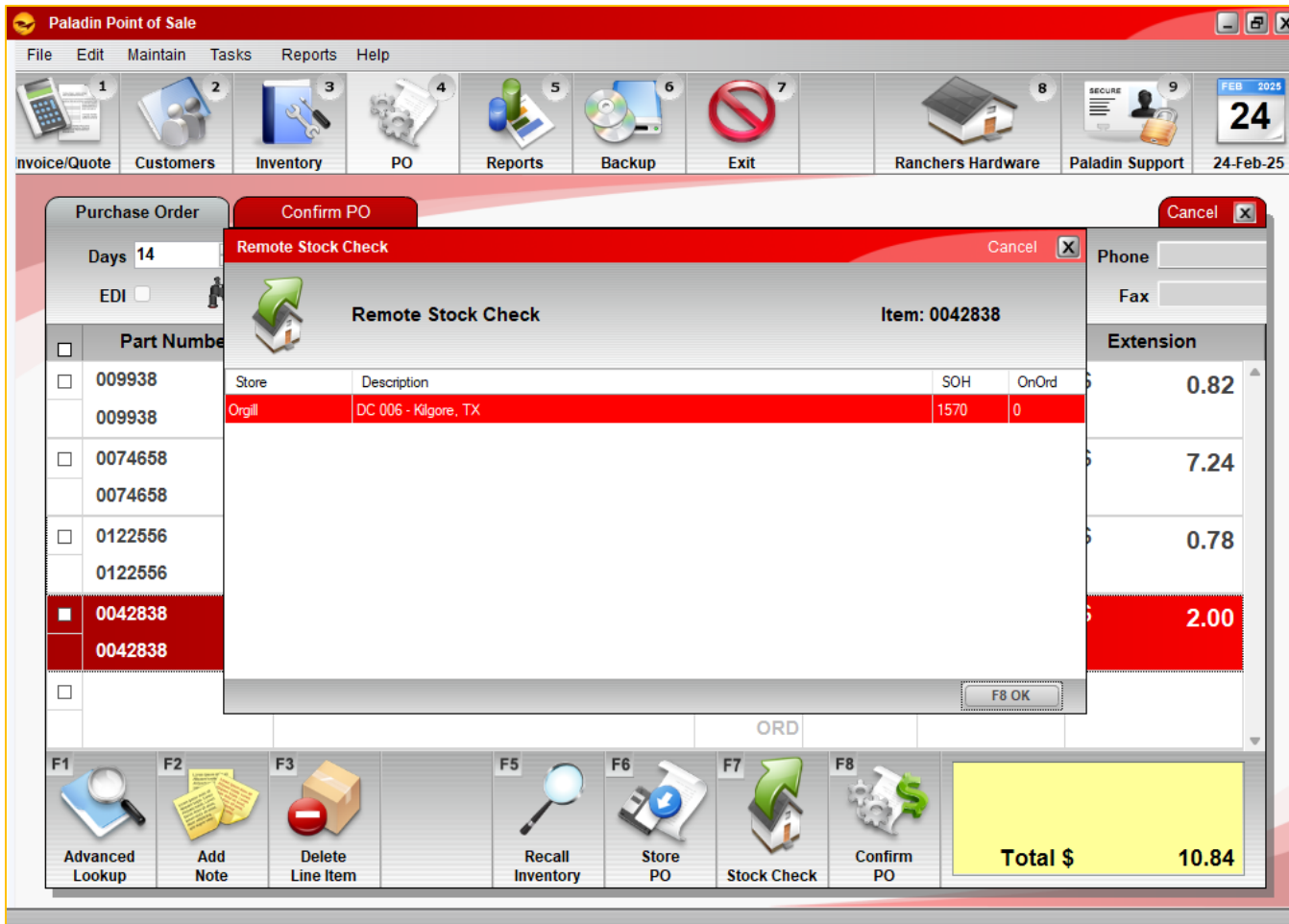


The screenshot displays the PO Module interface with several key components:

- Top Tabs:** Inventory, Order Control, Pricing, General, and Cancel.
- Part Information:** Part # 6946297, Desc 1 CONDUIT CLAMP 1/2 EMT 2HOLE, Alt # 051411961619, Desc 2.
- Status:** On Order: 0, Defective: 0, On Hold: 0, Stock On Hand: 0.
- Sales Details:** Investment: \$0.00, Gross Profit: \$0.82, ROI: 174%, Stock Days: 14, Need: 1.
- Forecast:** Overstock: 0, Waste: \$0.00, Shrinkage: 1, Gain: \$0.47.
- Purchase Order Confirmation:** Days 20, Supplier 13 - ORGILL, Address 1, City/State, Phone, Fax.
- Search Purchase Order:** Search field with "CONDUIT" entered, F9 Find Next button.
- Table of Purchase Order Items:**

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
6125959 437	PIPE NIPPLE GALV 1/4X2-1/2 Need: 1, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	EA -1	1	\$ 0.530	\$ 0.53
058114 438	KNIFE PUTTY PLASTIC 1-1/2IN Need: 1, OrdQty: 1.00, Min: 0.00, Max: 6.00, Ord%: 100%	EA 3	1	\$ 0.500	\$ 0.50
6946297 439	CONDUIT CLAMP 1/2 EMT 2HOLE BAG 4 Need: 1, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	0	1	\$ 0.470	\$ 0.47
6124861 440	PIPE NIPPLE BLACK 1/4XCLOSE Need: 1, OrdQty: 1.00, Min: 0.00, Max: 3.00, Ord%: 100%	EA -1	1	\$ 0.340	\$ 0.34
- Navigation Tools (Bottom Bar):**
 - F1: Advanced Lookup (Binoculars icon)
 - F2: Add Note (Note icon)
 - F3: Delete Line Item (Trash icon)
 - F5: Recall Inventory (Binoculars icon, circled in yellow)
 - F6: Store PO (Document icon)
 - F7: Stock Check (Upward arrow icon)
 - F8: Confirm PO (Checkmark icon)
- Total:** Total \$ 15,983.61

Stock check – multiple store check



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Ranchers Hardware 9 Paladin Support 24-Feb-25

Purchase Order Days 14 EDI ☐ **Confirm PO** **Remote Stock Check** Item: 0042838

Part Number	Store	Description	SOH	OnOrd	Extension
<input type="checkbox"/> 009938	Orgill	DC 006 - Kilgore, TX	1570	0	0.82
<input type="checkbox"/> 0074658					7.24
<input type="checkbox"/> 0122556					0.78
<input checked="" type="checkbox"/> 0042838					2.00
<input type="checkbox"/> 0042838					

F1 Advanced Lookup F2 Add Note F3 Delete Line Item F5 Recall Inventory F6 Store PO F7 Stock Check F8 Confirm PO

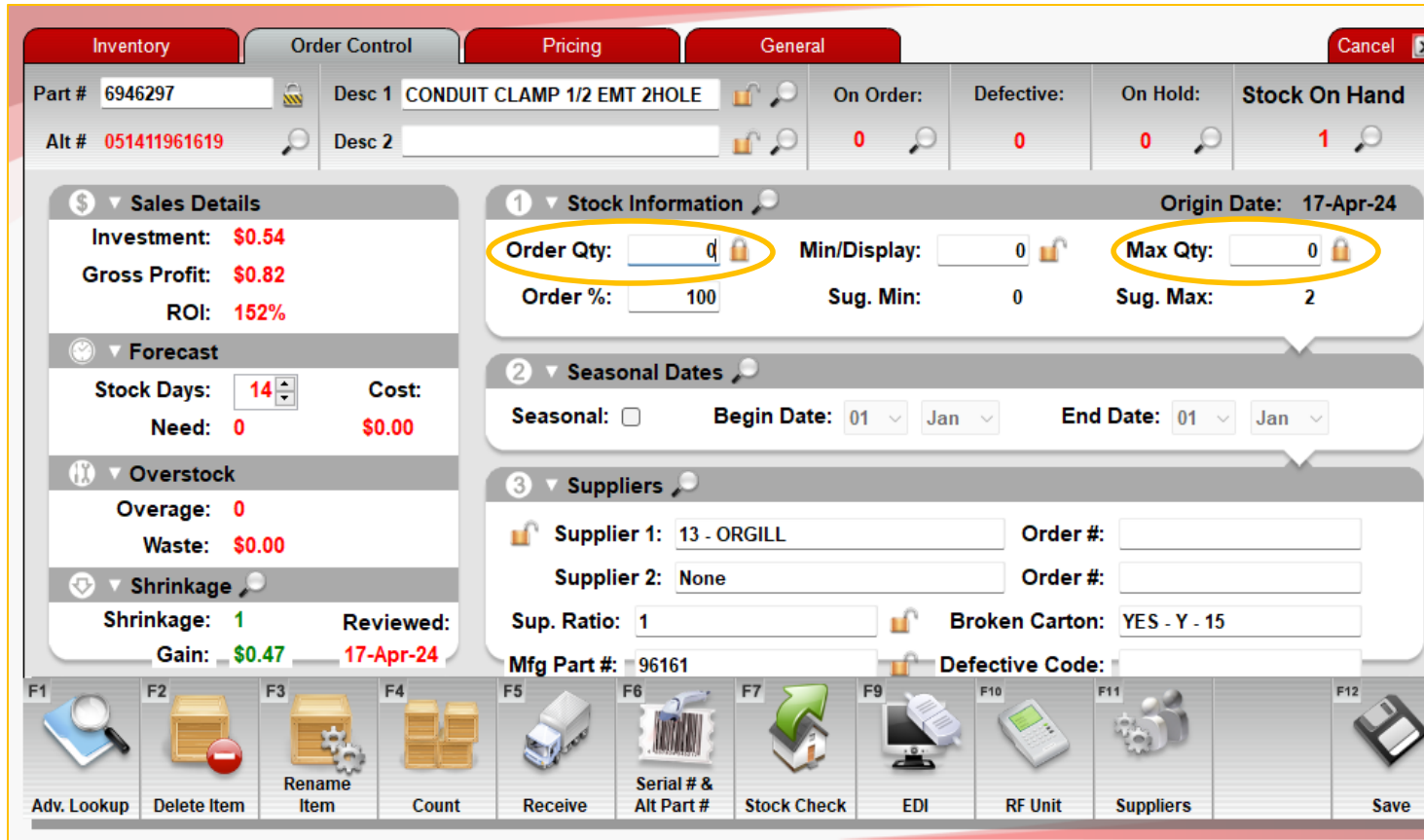
Total \$ 10.84

- Stock check feature shows the available inventory in your suppliers' warehouse (most EDI suppliers supported).
- Remote Stock Check works in the following modules:
 - Invoice/Quote module
 - Inventory module
 - Purchase Order module
- **Note:** This feature has been extended to show your other single store stock-on-hand quantities on this same screen.

Contact Paladin customer support to activate for your other single stores.

Inventory Module

Remove products from the suggested order



Inventory | Order Control | Pricing | General | Cancel

Part # 6946297 Desc 1 CONDUIT CLAMP 1/2 EMT 2HOLE On Order: 0 Defective: 0 On Hold: 0 Stock On Hand 1
Alt # 051411961619 Desc 2

Sales Details
Investment: \$0.54
Gross Profit: \$0.82
ROI: 152%

Forecast
Stock Days: 14 Cost: \$0.00
Need: 0

Overstock
Overage: 0
Waste: \$0.00

Shrinkage
Shrinkage: 1 Reviewed: 17-Apr-24
Gain: \$0.47

Stock Information Origin Date: 17-Apr-24
Order Qty: 0 Min/Display: 0 Max Qty: 0
Order %: 100 Sug. Min: 0 Sug. Max: 2

Seasonal Dates
Seasonal: ☐ Begin Date: 01 Jan End Date: 01 Jan

Suppliers
Supplier 1: 13 - ORGILL Order #:
Supplier 2: None Order #:
Sup. Ratio: 1 Broken Carton: YES - Y - 15
Mfg Part #: 96161 Defective Code:

F1 Adv. Lookup F2 Delete Item F3 Rename Item F4 Count F5 Receive F6 Serial # & Alt Part # F7 Stock Check F8 EDI F9 RF Unit F10 Suppliers F11 Save

- How to remove products from the suggested order report.
 - Set Max Qty to zero and lock the padlock.
 - EDI will normally set the Order Qty to zero and lock the padlock.
- Either of these two methods will prevent products from auto-ordering when using the suggested order report.

Multiple core charges

File→Setup→Invoice(Store) tab

☒ Use Alternate Core Charge Identifier

Core Charge Identifier:

Core charge department

Classes

☒ Active ☐ Deleted

ID	Name	Default Dept
1	TEST	4000
2	SO rewards Exclusion	
3	Can/Bottle Recycle	
4	Battery Core	
5	GVMT	

Name: ←

Class ID:

Default Dept:

Save

Reset

Invoice / Quote **Checkout**

Rewards: Customer:

Credit: Address 1:

Tax	Def	Net	Part Number	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10001	BRUSH STRIPPING 8-1/4
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10001	4.49
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GVMT FEE	GVMT Fee for item 10001
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paint recycle fee	

Core charge fee report

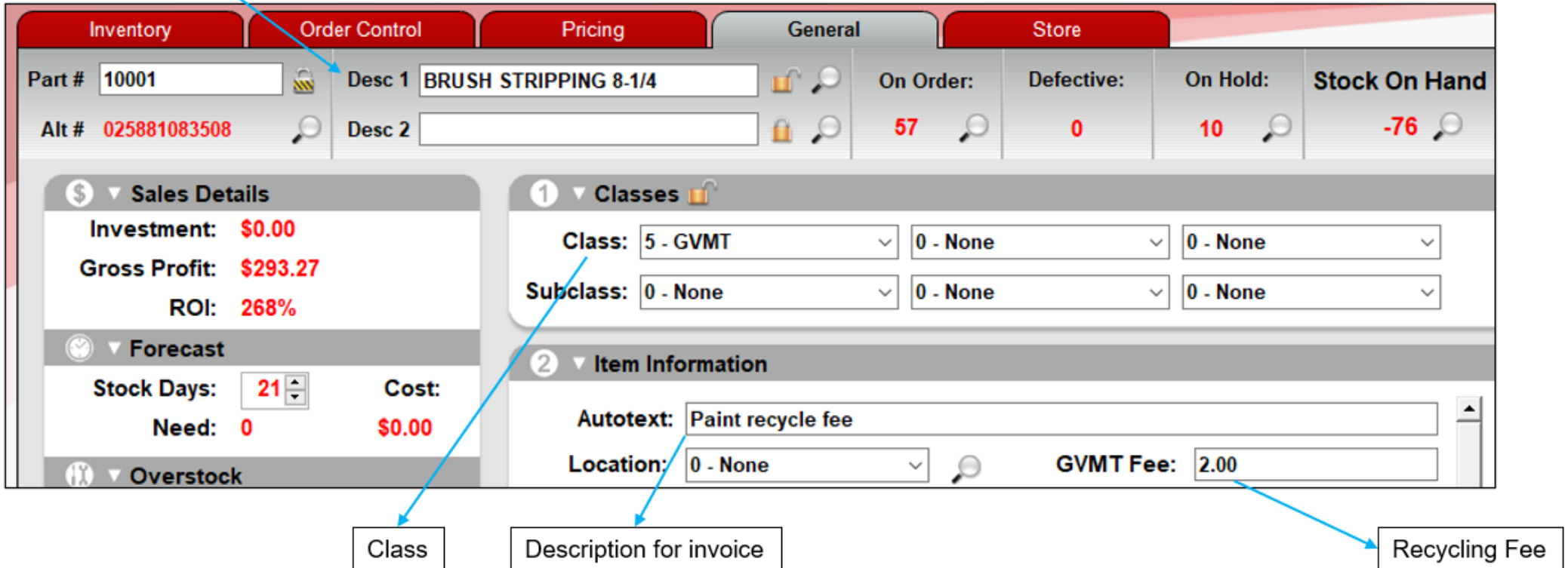
1	Data for 05/01/2023 to 05/18/2023	Class Number	Class Name	Total
2		5	GMVT	4.00
3	Grand Total			4.00

Multiple core charge types are supported in Paladin as classes.

- Add a generic core charge description in file/setup/Invoice(Store) tab under the “Use alternate core charge identifier”.
- Set each core charge type as a new class.
- Add core charge and core charge class to products that require a core charge.
- Print core charges details report under Sales Analysis/What I need to Know/Core Charge Details.
- Optionally add an Auto-Text description.

Multiple core charges – inventory example

Product requiring recycling core charge



Inventory	Order Control	Pricing	General	Store
Part # 10001	Desc 1 BRUSH STRIPPING 8-1/4	On Order: 57	Defective: 0	On Hold: 10
Alt # 025881083508	Desc 2			Stock On Hand: -76

Sales Details

Investment: \$0.00

Gross Profit: \$293.27

ROI: 268%

Forecast

Stock Days: 21

Cost: \$0.00

Overstock

Classes

Class: 5 - GVMT

Subclass: 0 - None

Item Information

Autotext: Paint recycle fee

Location: 0 - None

GVMT Fee: 2.00

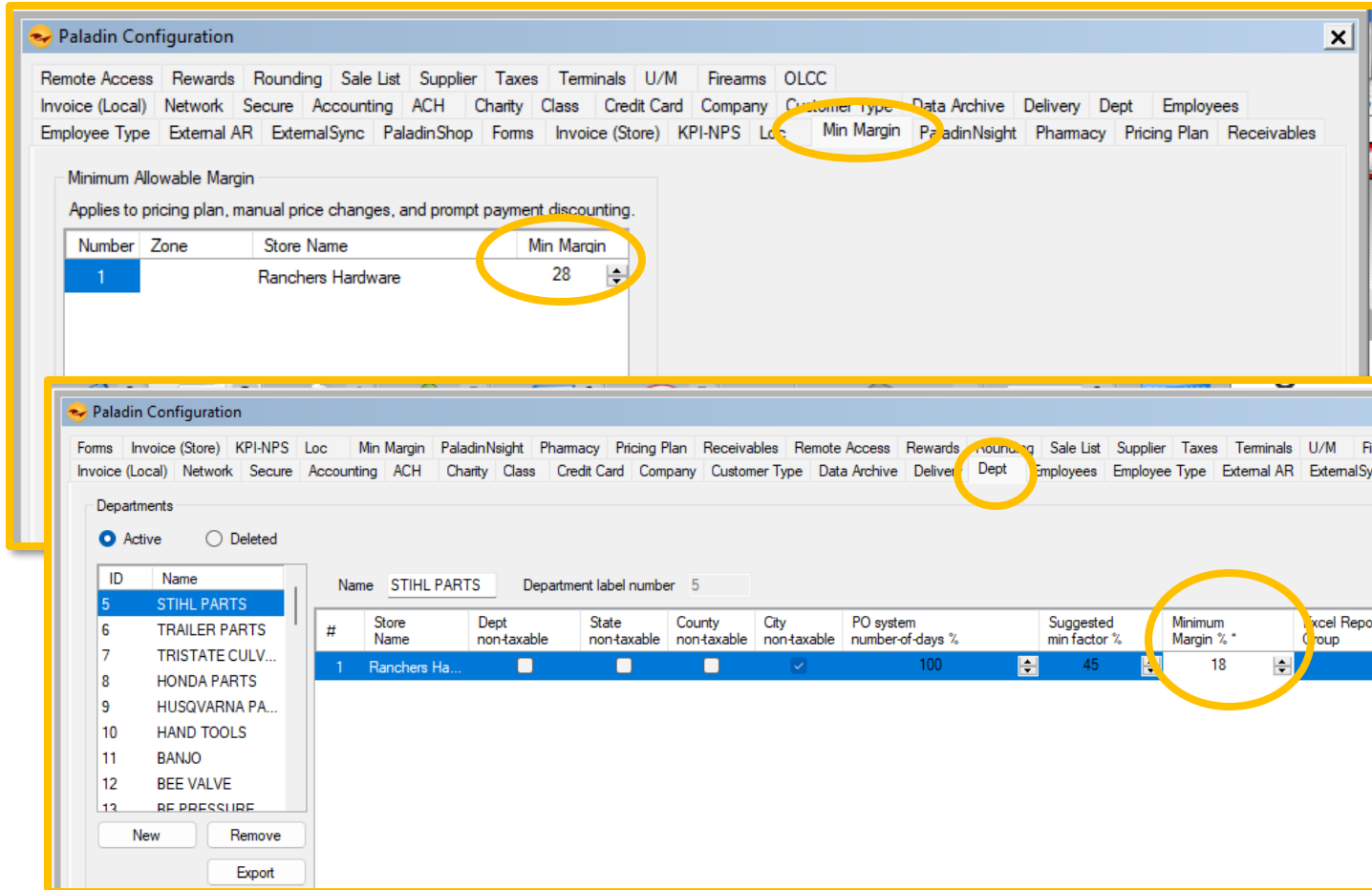
Class

Description for invoice

Recycling Fee

Minimum margins

Minimum Margin



Paladin Configuration

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

Minimum Allowable Margin
 Applies to pricing plan, manual price changes, and prompt payment discounting.

Number	Zone	Store Name	Min Margin
1		Ranchers Hardware	28

Paladin Configuration

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

Departments
☒ Active ☐ Deleted

ID	Name
5	STIHL PARTS
6	TRAILER PARTS
7	TRISTATE CULV...
8	HONDA PARTS
9	HUSQVARNA PA...
10	HAND TOOLS
11	BANJO
12	BEE VALVE
13	REPRESSURE

New Remove Export

Name STIHL PARTS Department label number 5

#	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	Ranchers Ha...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100	45	18	

- Minimum margins will help your store stay profitable by protecting your margins in several areas.
 - When changing prices at checkout.
 - When adding discounts at checkout using F4 Discount button.
 - When creating sales and promotions.
 - When issuing rewards points.
 - When issuing prompt payment discounts on the statements.
- Minimum margins can be store wide across the board or set at the department level.

Serialization

Product serialization



- Product serialization is the process of assigning unique IDs or “serial numbers” to individual items in a product line.
- Serial numbers are useful in many scenarios including:
 - Managing warranty coverage
 - Maintaining ownership records
 - Supplier traceability & reporting
 - Service and repair tracking
 - Enhanced accountability

RF unit receiving serialized items

RF Unit Mode:

#5. Receiving PO (Non-EDI)

(Requires 15-line display)

Receiving PO (Non-EDI)

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

Enter Serial number 1 of 1

```
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

Enter Serial number 1 of 1
CS-23499584_

```
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

- The new 15-line RF Unit function provides the capability to scan or enter serial numbers during the receiving process.
- See KBA: [RF Unit: 15 line functionality](#)
- See webinar: [New RF Gun Capabilities Put the Power of Paladin in Your Hands](#)

















Clearance management

PaladinNsight's Clearance management

You can lead a horse to water, but you can't make it drink.

Order By: ☐ Location ☒ Department Limit To Supplier: 0 - None

Display By: ☒ # of Items ☐ % of Items No Sales For: 365 Days

	Dept	Name	Condition (by % out of date)
	10	CLEANING SUPPLIES	<div><div></div></div>
	14	PAINT AND PAINT SUP...	<div><div></div></div>
	20	HAND TOOLS AND TO...	<div><div></div></div>
	28	POWER TOOLS	<div><div></div></div>
	30	FLASHLIGHTS / LIGH...	<div><div></div></div>
	34	ELECTRICAL SUPPLIES	<div><div></div></div>
	40	PLUMBING SUPPLIES...	<div><div></div></div>
	46	HEATING AND COOLI...	<div><div></div></div>
	50	HARDWARE	<div><div></div></div>
	56	FASTENERS	<div><div></div></div>
	58	BUILDING MATERIALS...	<div><div></div></div>
	60	APPLIANCES AND HO...	<div><div></div></div>
	64	HOUSEWARES AND GL...	<div><div></div></div>
	70	LAWN / GARDEN / FAR...	<div><div></div></div>
	76	OUTDOOR EQUIPME...	<div><div></div></div>
	80	SPORTING GOODS	<div><div></div></div>

1. In Paladin, from the top ribbon, select the **Inventory** module.
2. In the **PaladinNsight** dashboard, click any **magnifying glass** under each dial.
3. In the **Reviewer**, select the **Clearance** tab.
4. In the **Clearance** tab, in the **Order By** field, enable **Department**.
5. In the **Display By** field, enable **# of Items**.
6. Click the **magnifying glass** next to the department you want to view items from.

PaladinNsight's Clearance management (cont'd)

Inventory Closeout Details

You can lead a horse to water, but you can't make it drink.

Order By: ☐ Location ☒ Department Limit To Supplier:

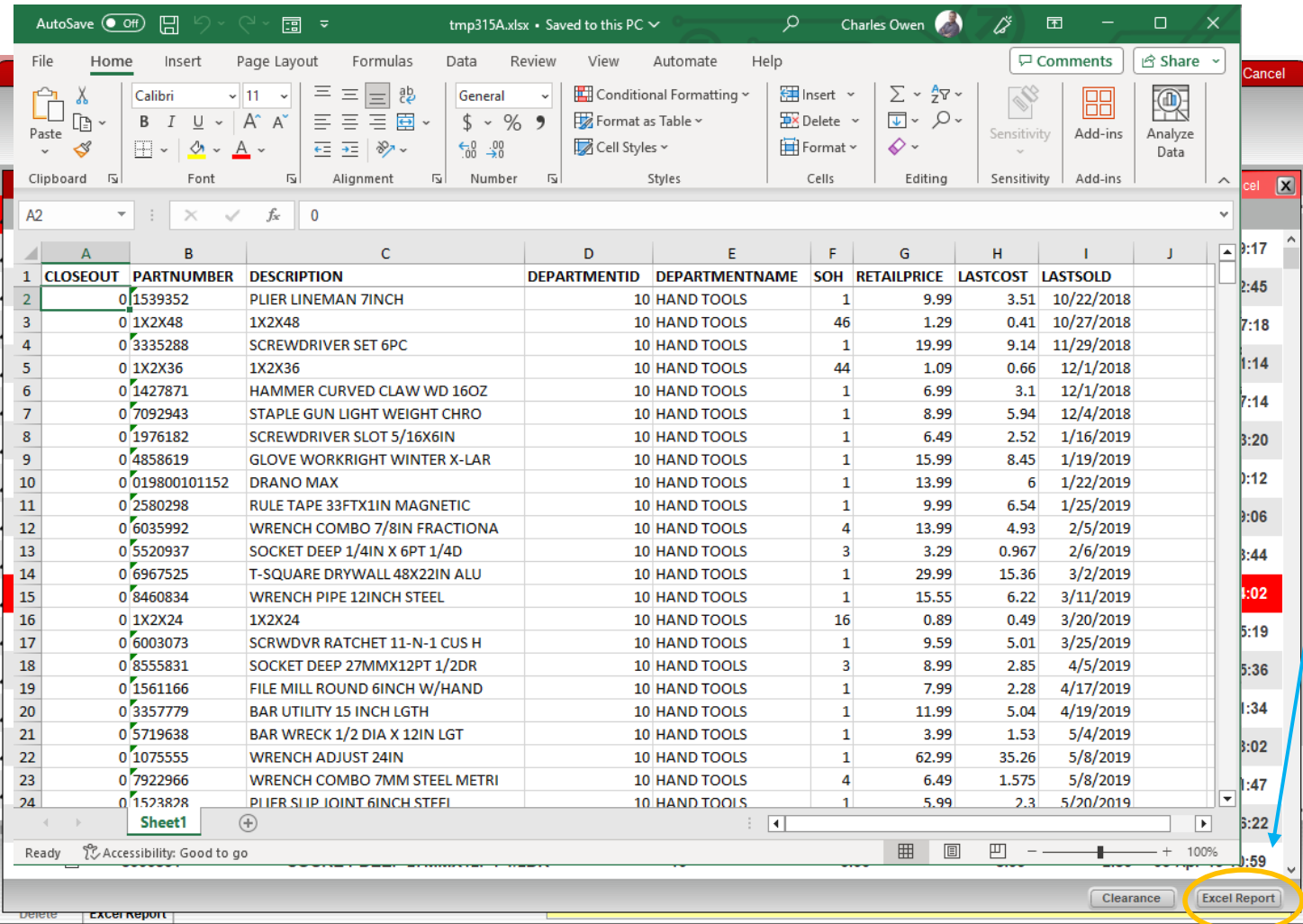
Display By: ☒ # of Items ☐ % of Items No Sales For: Days

Clearance	Part #	Description	Department	SOH	Retail Price	Unit Cost	Last Sold
<input type="checkbox"/>	1539352	PLIER LINEMAN 7INCH	10	1.00	9.99	3.51	22-Oct-18 19:17
<input type="checkbox"/>	1X2X48	1X2X48	10	46.00	1.29	0.41	27-Oct-18 12:45
<input type="checkbox"/>	3335288	SCREWDRIVER SET 6PC	10	1.00	19.99	9.14	29-Nov-18 17:18
<input type="checkbox"/>	1X2X36	1X2X36	10	44.00	1.09	0.66	01-Dec-18 11:14
<input type="checkbox"/>	1427871	HAMMER CURVED CLAW WD 16OZ	10	1.00	6.99	3.10	01-Dec-18 17:14
<input type="checkbox"/>	7092943	STAPLE GUN LIGHT WEIGHT CHRO	10	1.00	8.99	5.94	04-Dec-18 13:20
<input type="checkbox"/>	1976182	SCREWDRIVER SLOT 5/16X6IN	10	1.00	6.49	2.52	16-Jan-19 10:12
<input type="checkbox"/>	4858619	GLOVE WORKRIGHT WINTER X-L...	10	1.00	15.99	8.45	19-Jan-19 09:06
<input type="checkbox"/>	019800101152	DRANO MAX	10	1.00	13.99	6.00	22-Jan-19 13:44
<input checked="" type="checkbox"/>	2580298	RULE TAPE 33FTX1IN MAGNETIC	10	1.00	9.99	6.54	25-Jan-19 14:02
<input type="checkbox"/>	6035992	WRENCH COMBO 7/8IN FRACTIONA	10	4.00	13.99	4.93	05-Feb-19 15:19
<input type="checkbox"/>	5520937	SOCKET DEEP 1/4IN X 6PT 1/4D	10	3.00	3.29	0.97	06-Feb-19 15:36
<input type="checkbox"/>	6967525	T-SQUARE DRYWALL 48X22IN ALU	10	1.00	29.99	15.36	02-Mar-19 11:34
<input type="checkbox"/>	8460834	WRENCH PIPE 12INCH STEEL	10	1.00	15.55	6.22	11-Mar-19 13:02
<input type="checkbox"/>	1X2X24	1X2X24	10	16.00	0.89	0.49	20-Mar-19 11:47
<input type="checkbox"/>	6003073	SCRWDVR RATCHET 11-N-1 CUS H	10	1.00	9.59	5.01	25-Mar-19 16:22
<input type="checkbox"/>	8555831	SOCKET DEEP 27MMX12PT 1/2DR	10	3.00	8.99	2.85	05-Apr-19 10:59

Clearance Excel Report

1. After selecting a **department**, individual items can be chosen for clearance by simply clicking the checkbox on the left.
2. Sort by any of the column headers such as, **Last Sold, SOH, Retail Price, Unit Cost**, etc.
3. When you're ready to add these items to clearance, click the **Clearance** button on the bottom right-hand corner.
4. As items are checked they will fall off the page and be added to a sale list.

PaladinNsight's new Clearance management (cont'd)



AutoSave Off tmp315A.xlsx • Saved to this PC Charles Owen

File Home Insert Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Cells Editing Sensitivity Add-ins Analyze Data

A2 0

	A	B	C	D	E	F	G	H	I	J
1	CLOSEOUT	PARTNUMBER	DESCRIPTION	DEPARTMENTID	DEPARTMENTNAME	SOH	RETAILPRICE	LASTCOST	LASTSOLD	
2	0	1539352	PLIER LINEMAN 7INCH	10	HAND TOOLS	1	9.99	3.51	10/22/2018	
3	0	1X2X48	1X2X48	10	HAND TOOLS	46	1.29	0.41	10/27/2018	
4	0	3335288	SCREWDRIVER SET 6PC	10	HAND TOOLS	1	19.99	9.14	11/29/2018	
5	0	1X2X36	1X2X36	10	HAND TOOLS	44	1.09	0.66	12/1/2018	
6	0	1427871	HAMMER CURVED CLAW WD 16OZ	10	HAND TOOLS	1	6.99	3.1	12/1/2018	
7	0	7092943	STAPLE GUN LIGHT WEIGHT CHRO	10	HAND TOOLS	1	8.99	5.94	12/4/2018	
8	0	1976182	SCREWDRIVER SLOT 5/16X6IN	10	HAND TOOLS	1	6.49	2.52	1/16/2019	
9	0	4858619	GLOVE WORKRIGHT WINTER X-LAR	10	HAND TOOLS	1	15.99	8.45	1/19/2019	
10	0	019800101152	DRANO MAX	10	HAND TOOLS	1	13.99	6	1/22/2019	
11	0	2580298	RULE TAPE 33FTX11IN MAGNETIC	10	HAND TOOLS	1	9.99	6.54	1/25/2019	
12	0	6035992	WRENCH COMBO 7/8IN FRACTIONA	10	HAND TOOLS	4	13.99	4.93	2/5/2019	
13	0	5520937	SOCKET DEEP 1/4IN X 6PT 1/4D	10	HAND TOOLS	3	3.29	0.967	2/6/2019	
14	0	6967525	T-SQUARE DRYWALL 48X22IN ALU	10	HAND TOOLS	1	29.99	15.36	3/2/2019	
15	0	8460834	WRENCH PIPE 12INCH STEEL	10	HAND TOOLS	1	15.55	6.22	3/11/2019	
16	0	1X2X24	1X2X24	10	HAND TOOLS	16	0.89	0.49	3/20/2019	
17	0	6003073	SCRWDVR RATCHET 11-N-1 CUS H	10	HAND TOOLS	1	9.59	5.01	3/25/2019	
18	0	8555831	SOCKET DEEP 27MMX12PT 1/2DR	10	HAND TOOLS	3	8.99	2.85	4/5/2019	
19	0	1561166	FILE MILL ROUND 6INCH W/HAND	10	HAND TOOLS	1	7.99	2.28	4/17/2019	
20	0	3357779	BAR UTILITY 15 INCH LGTH	10	HAND TOOLS	1	11.99	5.04	4/19/2019	
21	0	5719638	BAR WRECK 1/2 DIA X 12IN LGT	10	HAND TOOLS	1	3.99	1.53	5/4/2019	
22	0	1075555	WRENCH ADJUST 24IN	10	HAND TOOLS	1	62.99	35.26	5/8/2019	
23	0	7922966	WRENCH COMBO 7MM STEEL METRI	10	HAND TOOLS	4	6.49	1.575	5/8/2019	
24	0	1573828	PLIER SLIP JOINT 6INCH STEEL	10	HAND TOOLS	1	5.99	2.3	5/20/2019	

Sheet1

Ready Accessibility: Good to go

Clearance Excel Report

1. At any time, an Excel report is available. Click the **Excel Report** button on the bottom right-hand corner.
2. The items for that department will appear in an Excel worksheet.

Clearance function



- Using the PaladinNsight™ dashboard, clients can set up **clearance** items. The Clearance function automatically appears on the PaladinNsight dashboard for managers or other high-level employees.
- When the Item **Overstock** dynamic prompt is checked in the RF 15-line display options, the RF 15-line unit recognizes clearance items when in the **Overwrite SOH** or **Append to SOH** mode.

Note: See “PaladinNsight™ Clearance” KBA and/or watch the Paladin University webinar “New PaladinNsight Clearance Feature Helps You Clear Out Dead Stock”

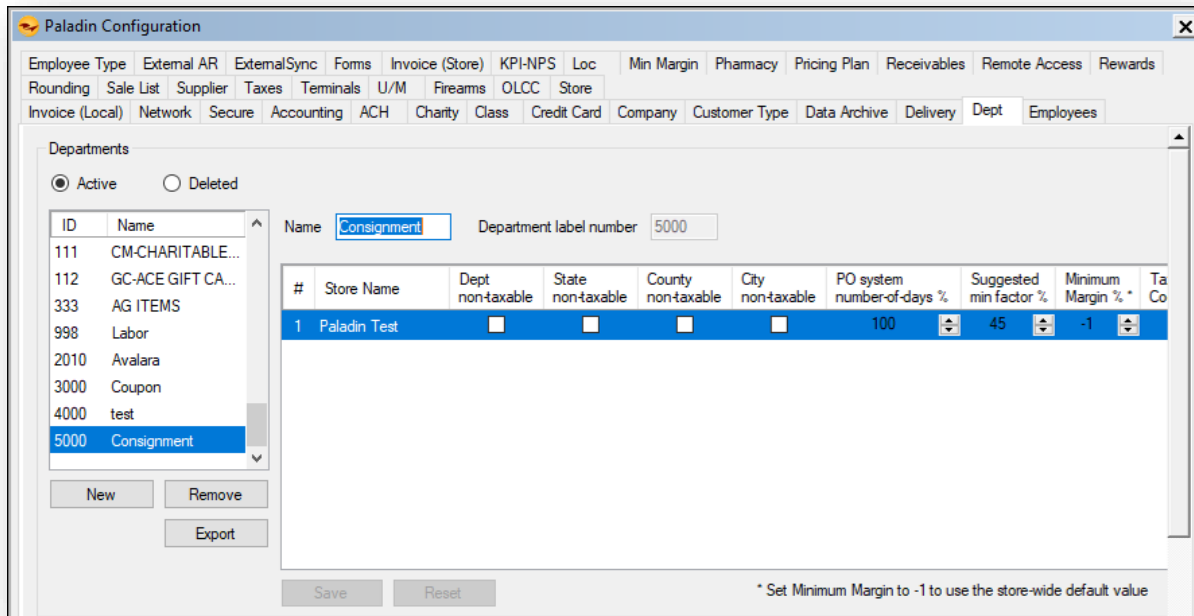
Selling on Consignment

What is selling on consignment

Consignment is an arrangement in which goods are left with a third party to sell. The party that sells the goods on consignment receives a portion of the profits, either as a flat rate fee or commission.

Paladin can help manage consignments by setting up a consignment department and customers, managing inventory, and organizing revenue and commission income reporting. The best approach is to add them as a supplier in Paladin. This makes it easier for tracking and reporting as well as managing their commission or percentage of sales.

Setting up a consignment department



The screenshot shows the 'Paladin Configuration' window with the 'Dept' tab selected. In the 'Departments' pane, the 'Active' radio button is selected. A list of departments is shown on the left, with '5000 Consignment' selected. The 'Name' field is set to 'Consignment' and the 'Department label number' is set to '5000'. Below this, a table lists existing departments, with '1 Paladin Test' highlighted. The table has columns for #, Store Name, Dept non-taxable, State non-taxable, County non-taxable, City non-taxable, PO system number-of-days %, Suggested min factor %, Minimum Margin %, and Ta Co.

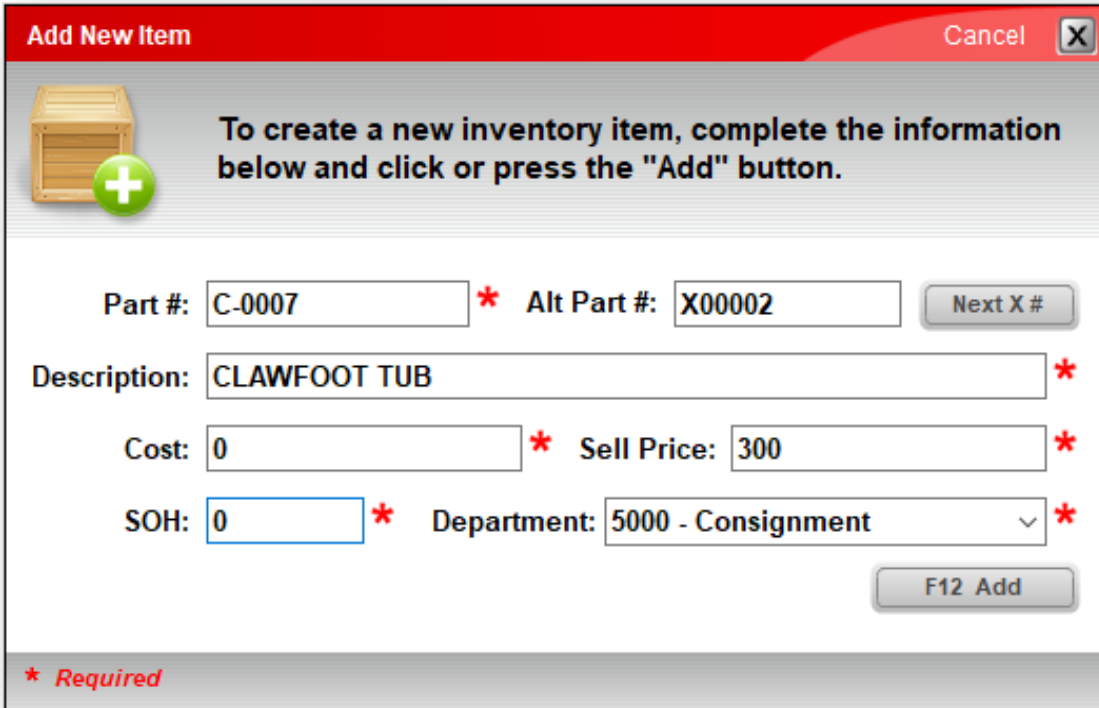
#	Store Name	Dept non-taxable	State non-taxable	County non-taxable	City non-taxable	PO system number-of-days %	Suggested min factor %	Minimum Margin %	Ta Co
1	Paladin Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	45	-1	

Buttons at the bottom include 'New', 'Remove', 'Export', 'Save', and 'Reset'. A note at the bottom right states: '* Set Minimum Margin to -1 to use the store-wide default value'.

To set up a department:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Dept** tab.
3. In the **Departments** pane, under the **ID/Name** field, click **New**.
4. Enter **Consignment** in the **Name** box.
5. In the **Department label number** box, enter a number that exceeds existing department ID numbers. This will provide a method for segregating the consignment department when reporting.
6. Click **Save**, then click **Close**.

Adding a consignment item into inventory



The screenshot shows the 'Add New Item' window with a red title bar and a 'Cancel' button. It contains a wooden crate icon with a green plus sign and instructional text. The form fields are as follows:

Field	Value	Required
Part #	C-0007	*
Alt Part #	X00002	
Description	CLAWFOOT TUB	*
Cost	0	*
Sell Price	300	*
SOH	0	*
Department	5000 - Consignment	*

Buttons: 'Next X #' (disabled), 'F12 Add' (active).

* Required

1. Select the **Inventory** module.
2. On the bottom ribbon, select **F2 Add Item**.
3. In the **Add New Item** window, enter the information:
 - **Part #** – Enter a part number that is unique. Tip: Preface with "C-" for quick searching.
 - **Alt Part #** – If you want to auto-assign an alternate part number, click **Next X #**.
 - **Description** – Enter a concise description of the item. For example: Clawfoot tub.
 - **Cost** – Enter a zero. You will assign this item a margin percentage in a subsequent step.
 - **Sell Price** – Enter the retail selling price.
 - **SOH** – Enter zero.
 - **Department** – From the list, select the consignment department.
 - Click **F12 Add**.

Establishing a reference margin for the new item

1

Item Cost

Last:

Avg:

Mkt:

Cost

Qty / Date

0.00

0.00

0.00

0

Cost Per:

Item

01-Jan-00

2

Pricing Levels

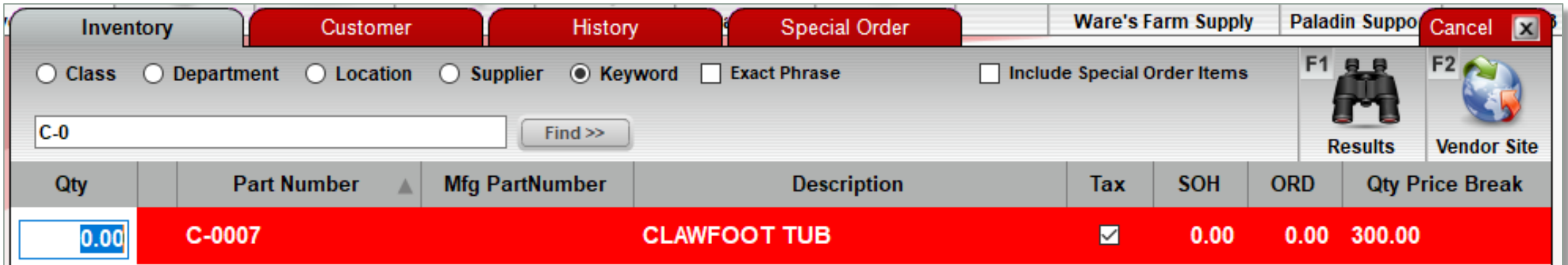
	Quantity	Sale Price	Margin	Mkt Margin	Ref	Rounding
1	1	300.00	100.0	100.0	50	
2	0	0.00	0	0	0	
3	0	0.00	0	0	0	
4	0	0.00	0	0	0	

1. Open the **Pricing** tab.
2. In the **Pricing Levels** pane, add a price and a **Ref** margin.
3. Click **F12 Save** and exit the Inventory module.

The reference margin amount may be equal to the margin you will realize from the sale of this consignment item. For example, if you expect to get 50% of the purchase price and the other 50% goes to the consignment supplier, then the amount of the reference margin will be 50. Another example is if you expect to receive 40% of the purchase price and the other 60% goes to the consignment supplier, then the amount of the reference margin will be 40% or \$120, and the commission to the seller would be 60% or \$180.

Selling an item on consignment

1. Select the **Invoice/ Quote** module.
2. Under **Part** number, enter the item's part number.
3. Click **F1 Adv. Lookup** to get the part number.
 1. Search by **Keyword** or **Department**. For keyword you can begin the search with "C-" if part numbers were setup accordingly. As an option you can also search by the consignment department.
 2. Highlight the item, and under **QTY**, add a quantity.
 3. Click **Enter**.
 4. Click **F8 Add Items to Invoice**

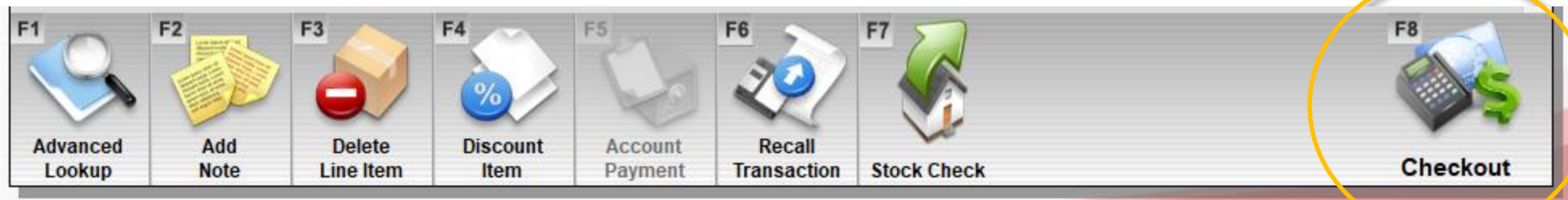


The screenshot shows a software window titled 'Inventory' with several tabs: 'Inventory', 'Customer', 'History', 'Special Order', 'Ware's Farm Supply', and 'Paladin Suppo'. The 'Inventory' tab is active. Below the tabs, there are search options: 'Class', 'Department', 'Location', 'Supplier', 'Keyword' (selected), and 'Exact Phrase'. A search box contains 'C-0' and a 'Find >>' button. To the right, there are icons for 'F1 Results' (binoculars) and 'F2 Vendor Site' (globe). Below the search options, a table displays search results. The first row is highlighted in red and contains the following data:

Qty	Part Number	Mfg PartNumber	Description	Tax	SOH	ORD	Qty Price Break
0.00	C-0007		CLAWFOOT TUB	<input checked="" type="checkbox"/>	0.00	0.00	300.00

Selling an item on consignment (cont'd)

4. On the bottom ribbon of the **Invoice/Quote** tab, click **F8 Checkout**.
5. On the bottom ribbon of the **Checkout** tab, select a **payment type** and press **Enter** to complete the sale.



Reporting on consignment items and consignment customers/suppliers

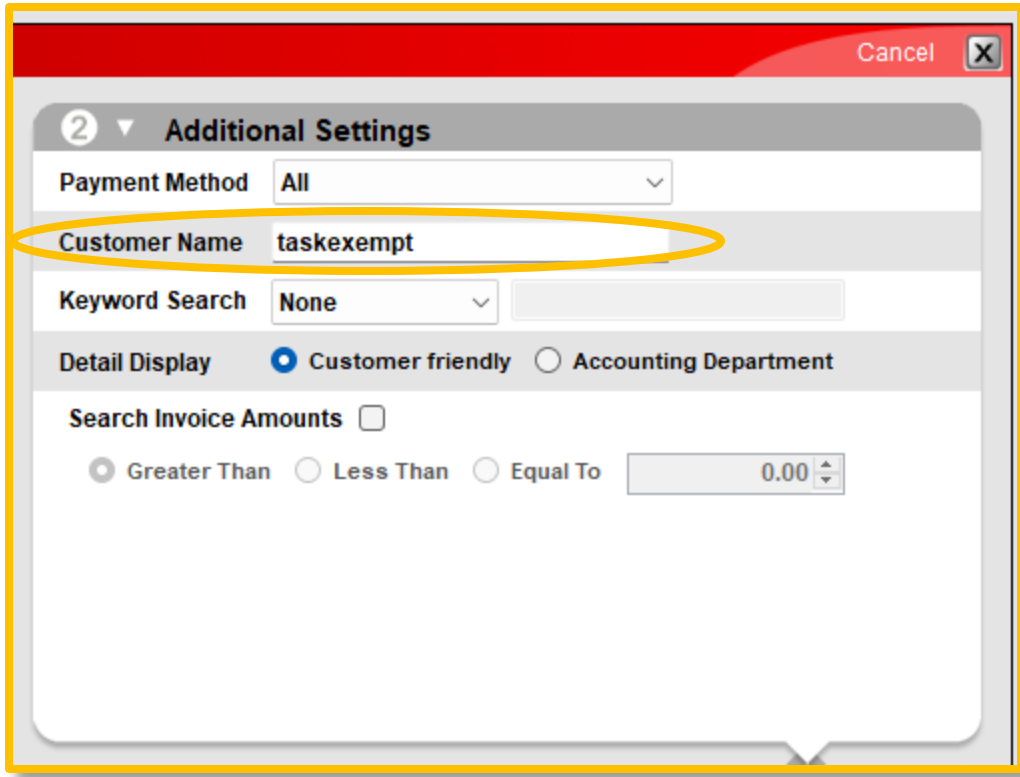
There are several reports that can help track consignment items, including:

- Comparative Revenue Report
- Transaction Report
- Inventory Count List
- Inventory – Master Report
- Inventory – Summary Report

Little-known reports in Paladin

CLASSIFIED

Itemized tax exemption transaction report



2 Additional Settings

Payment Method All

Customer Name taskexempt

Keyword Search None

Detail Display ☒ Customer friendly ☐ Accounting Department

Search Invoice Amounts ☐

☒ Greater Than ☐ Less Than ☐ Equal To 0.00

- This report generates a transaction report for any and all transactions that include a tax-exempt sale, whether it's a single line item or the entire invoice.
- Under Inventory, What I Need to Know, Transaction Report, enter the word "taxexempt" as the Customer Name on the additional settings field.

All Items Report

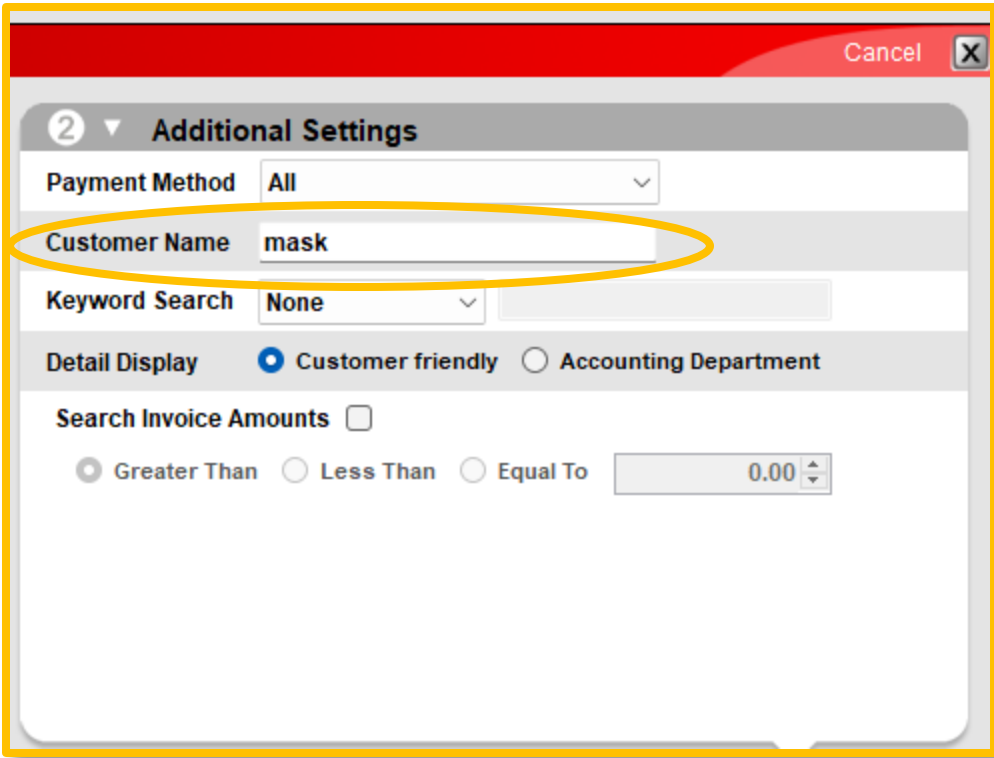
Suggested Order Report

1 ▾ **Report Settings**

Selection	Beginning	Ending
PartNumber	allitems	allitems
Department	0 ▾	99999999 ▾
Supplier	0 ▾	99999999 ▾
Class	0 ▾	99999999 ▾
SubClass	0 ▾	99999999 ▾
Location	0 - L 0 ▾	99999999 ▾

- This report generates a suggested order report but completely ignores the needs analysis. In other words, it prints all items determined by the Report Settings selection you choose.
- Under Inventory, purchase order, suggested order report, enter the word “allitems” in the beginning and ending field of part number.

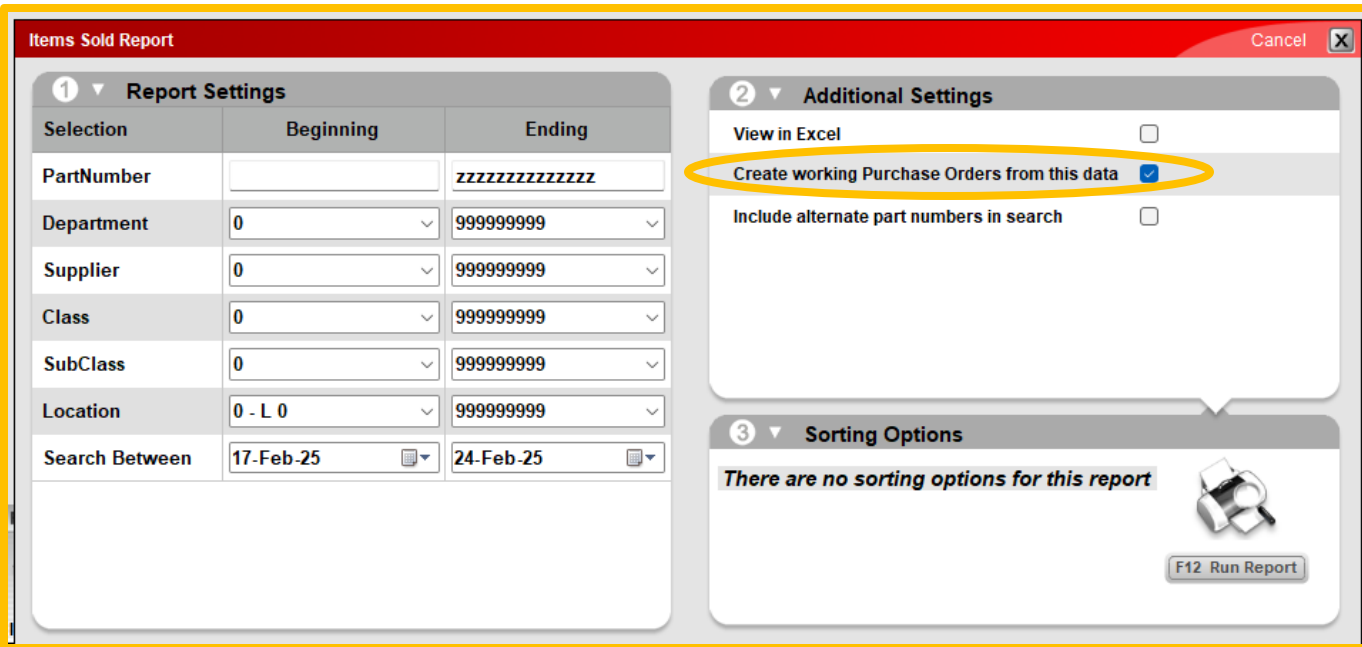
Restricted items transaction report



The screenshot shows a software interface for generating a report. The 'Additional Settings' section is expanded, showing several configuration options. The 'Customer Name' field is highlighted with a yellow oval and contains the text 'mask'. Other fields include 'Payment Method' set to 'All', 'Keyword Search' set to 'None', and 'Detail Display' set to 'Customer friendly'. There is also a 'Search Invoice Amounts' section with radio buttons for 'Greater Than', 'Less Than', and 'Equal To', and a numeric input field set to '0.00'.

- This report generates a transaction report for any and all transactions that include a stop-meth or restricted item.
- Under Inventory, What I Need to Know, Transaction Report, enter the word “mask” as the Customer Name on the additional settings field.

Items Sold Report – Replenishment ordering



Items Sold Report [Cancel] [X]

1 Report Settings

Selection	Beginning	Ending
PartNumber		ZZZZZZZZZZZZZZZZ
Department	0	999999999
Supplier	0	999999999
Class	0	999999999
SubClass	0	999999999
Location	0 - L 0	999999999
Search Between	17-Feb-25	24-Feb-25

2 Additional Settings

View in Excel ☐

Create working Purchase Orders from this data ☒

Include alternate part numbers in search ☐

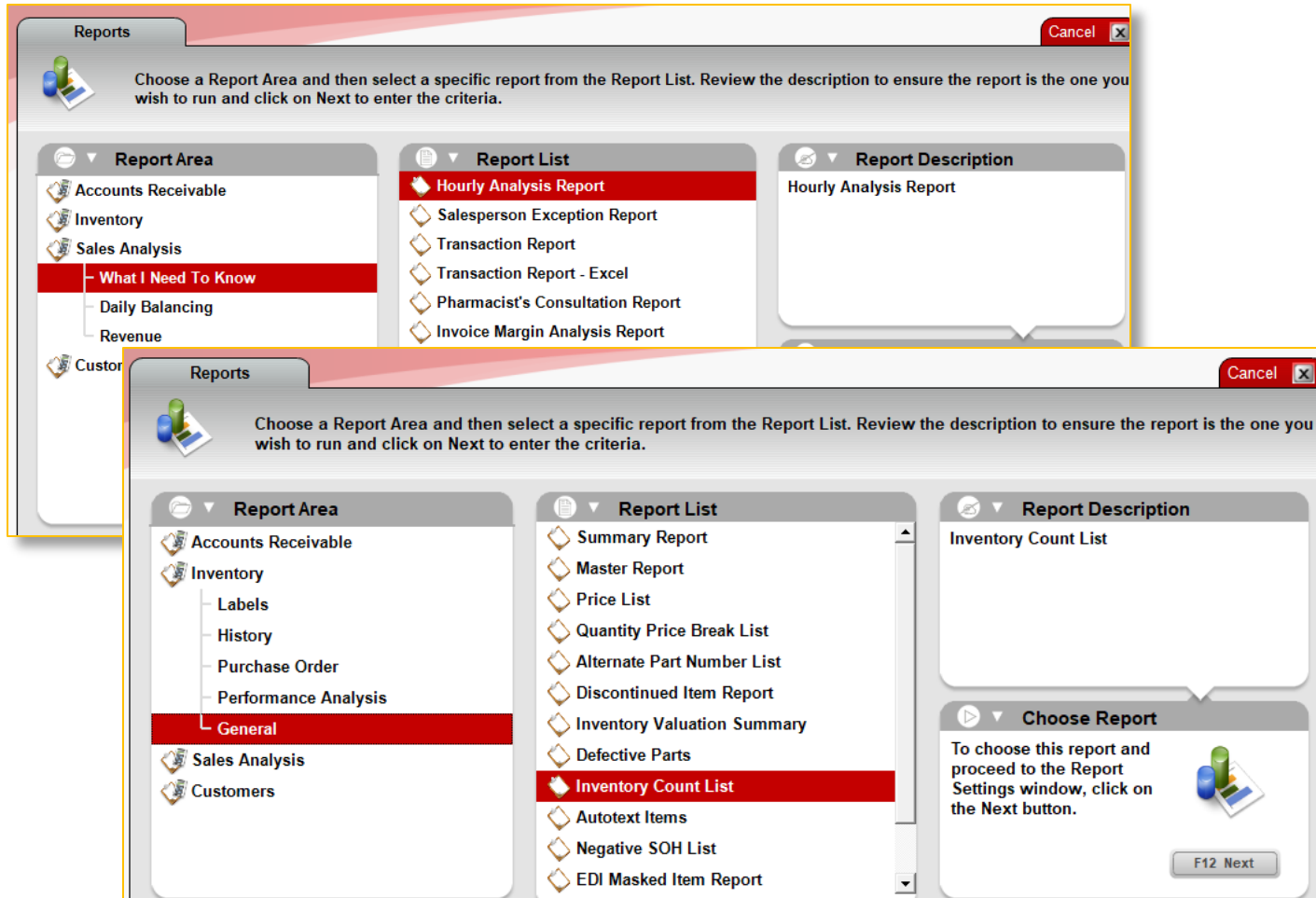
3 Sorting Options

There are no sorting options for this report

F12 Run Report

- This report generates a sales history report of what was sold based on a date range and other criteria.
- This report enables you to generate a working purchase order from this data. The resulting purchase order can act as a foundation for ordering.
- Under Inventory, history, Items sold report, check the box “Create Purchase Orders from this data”.

Other little-known reports



- Hourly Analysis Report
 - See when your store is the busiest and what hours may require more resources.
- Inventory Count List
 - Upside down margins.
 - Retail pricing by category.
 - Top 10 movers – Top 100 movers.
 - Cycle counting assignments.

Learn More

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

- [New PaladinN Sight Clearance Feature Helps You Clear Out Dead Stock](#)
- [Protect Your Profits with Paladin](#)
- [Little known reports — Treasures buried within Paladin](#)
- [Shortcuts to Becoming a Paladin Power User](#)
- [Increase Revenue by Managing Consignments with Paladin](#)
- [Let Paladin Protect Your Margins](#)

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

Next Webinar:

PaladinShop™

Your Store's Online Game Changer

March 18, 2025

9am PT

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