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Discover the Hidden Gems in Paladin

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February 25, 2025

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

Profit Analyst

Cancel ✕

◉ Average Cost   ○ Market Cost

Item	Cost	Profit	Margin
Current Line	$131.400	$48.60	27.0%
Invoice	$138.620	$56.04	28.8%

Right-click menu:

- 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 table:

Tax	Def	Net	Part Number	Description
☑	☐	☐	P1234	1 GALLON BASE 1 PAINT
341		0	P1234	25.00
☑	■	■	PB5678	
480		0	PB5678	
☑	☐	☐		

Rewards   Customer
Credit   Address 1

SOH ORD

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Insert Subtotal

Invoice / Quote | **Checkout**

Rewards

Credit 350.00

Customer 8101 - CHRIS HOLLIMAN

Address 1 3515 HWY 1 S

Tax ☑	Def ☐	Net ☐	Part Number	
☑	☐	☐	533602	24" BAR TREAD IN LIEU OF
-2		0	533602	180.00
☑	☐	☐	00001410300	PRE FILTER
0		0	00001410300	3.85
☑	☐	☐	00000071601	SET OF GAS
0		0	00000071601	7.82
			Section 1 - Subtotal $191.67	
☑	☐	☐	#3562	NOZZLE CAP
41		0	#3562	2.99

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
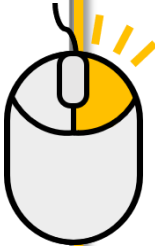Pick Alt Dynamic Kit Item
Tax Holiday (Ctrl + T)
Create a PO
Add Managed Item

Copy (Ctrl + C)
Paste (Ctrl + V)

Invoice Subtotal Cancel

What do you want to name the subtotal?

Subtotal Name Section 1

Cancel   OK [F8]

Create a PO

Update to Current Price(s)

- 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

• Notes can be automatically included on the purchase order and special orders
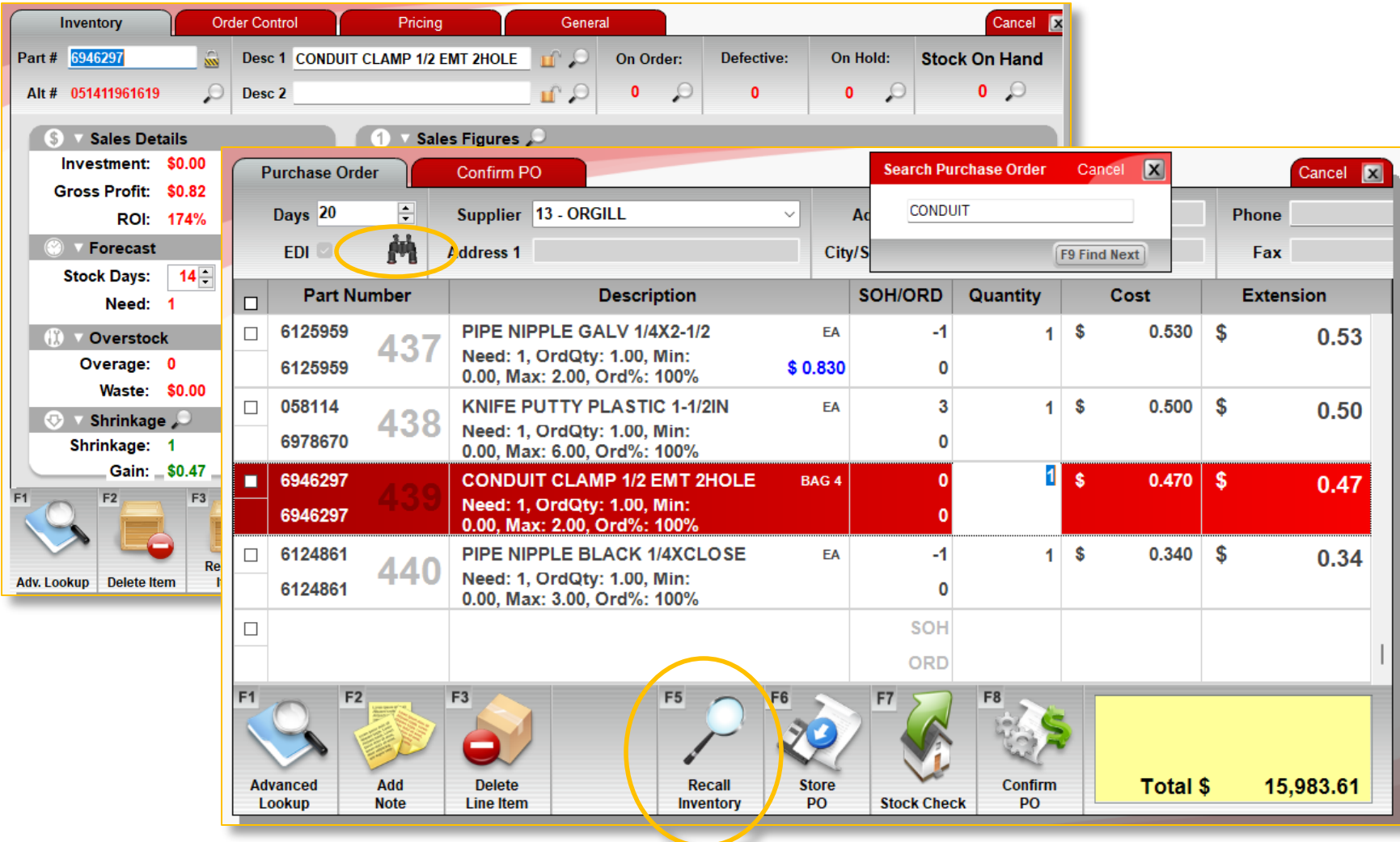
File→ Setup→ Invoice(Store) tab settings

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.

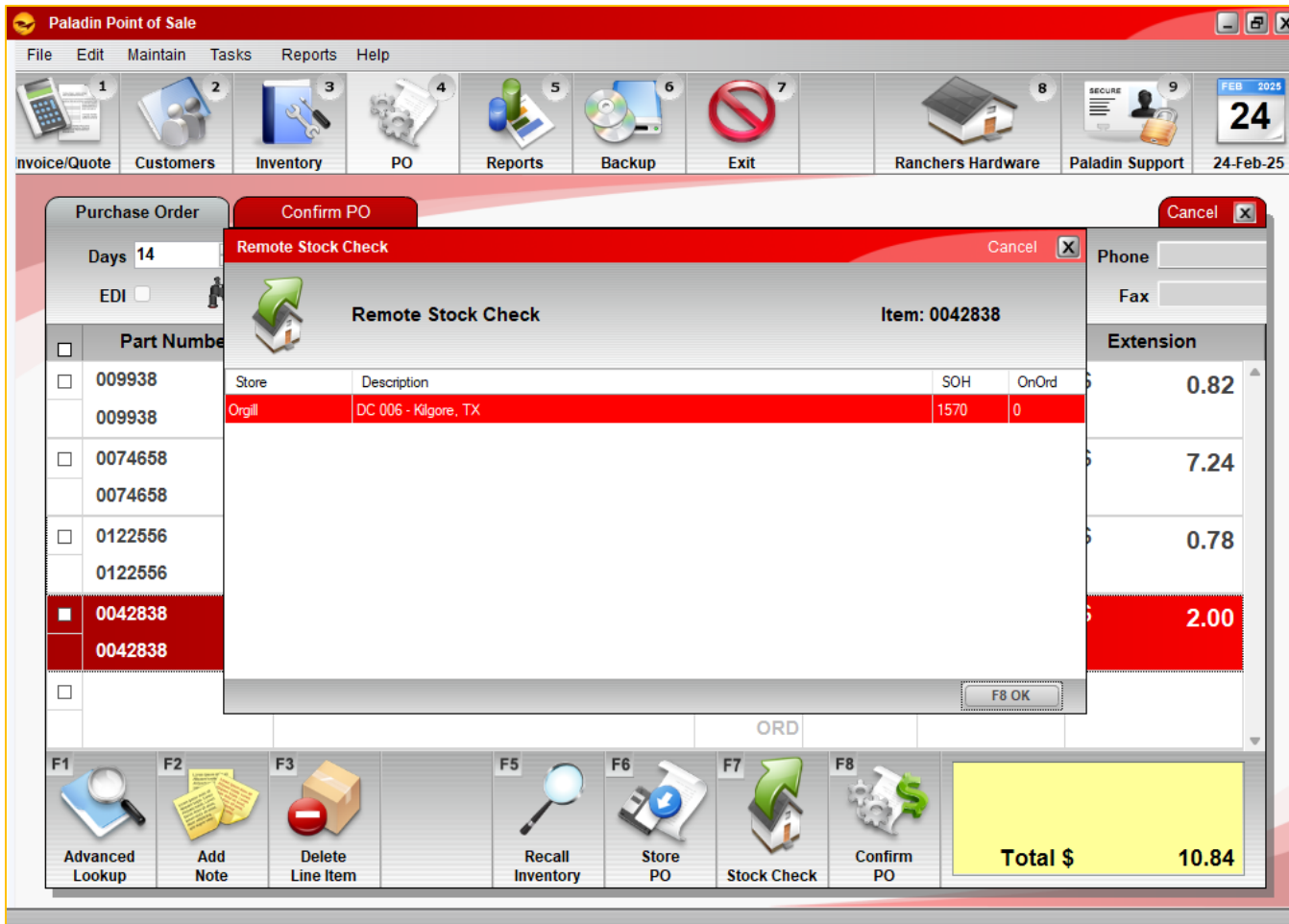 - F5 – Recall Inventory jumps straight to the inventory item selected.

Stock check – multiple store check

- 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

- 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

Multiple core charge types are supported in Paladin as classes.

File→Setup→Invoice(Store) tab

Core charge department

- 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.

Core charge fee report

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

Multiple core charges – inventory example
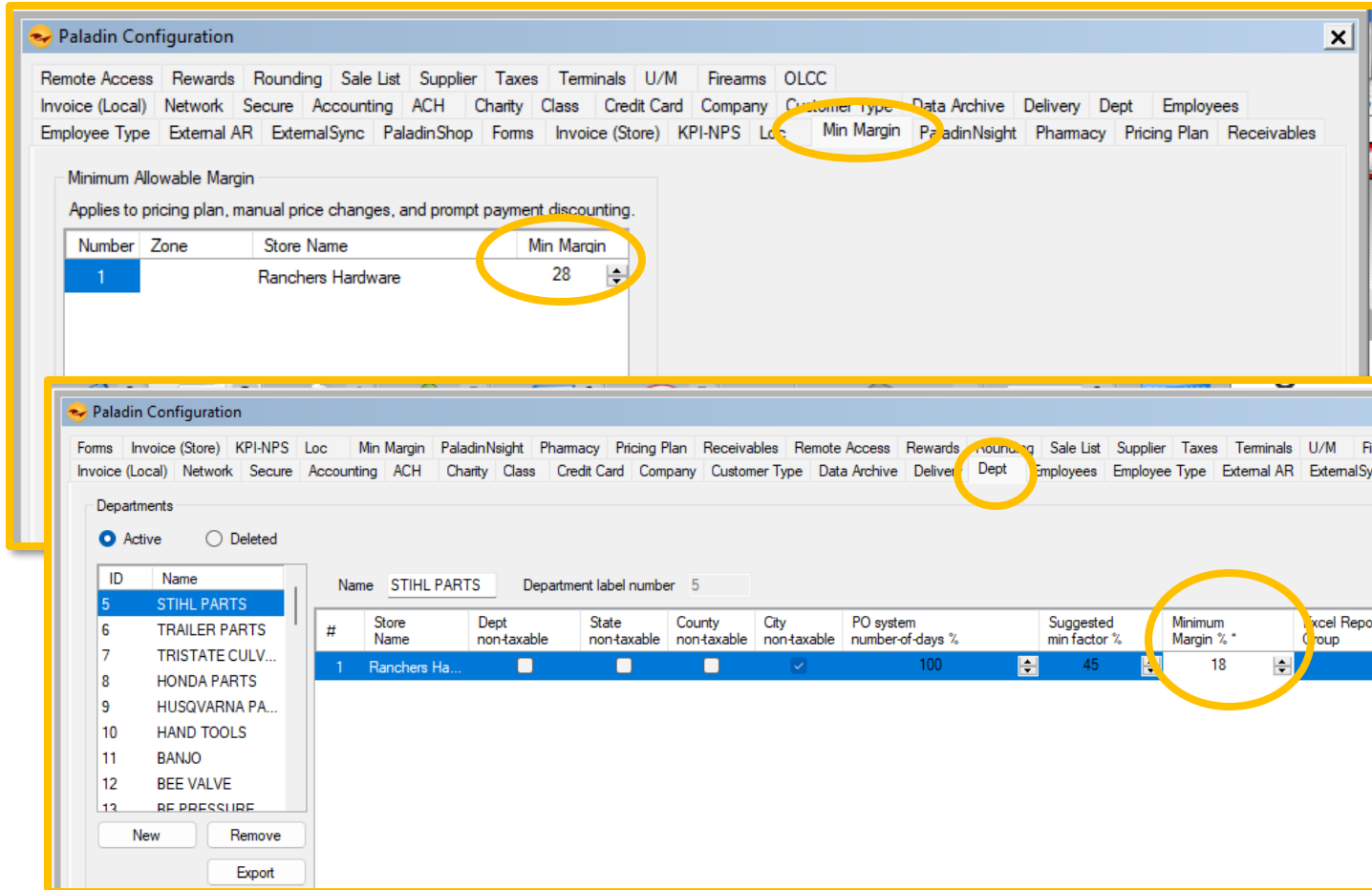
Minimum margins

Minimum Margin

- 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

Serial #: 123456-789012

- 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)

- 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

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)

1. After selecting a **department**, individual items can be chosen for clearance by simply clicking the checkbox on the left.
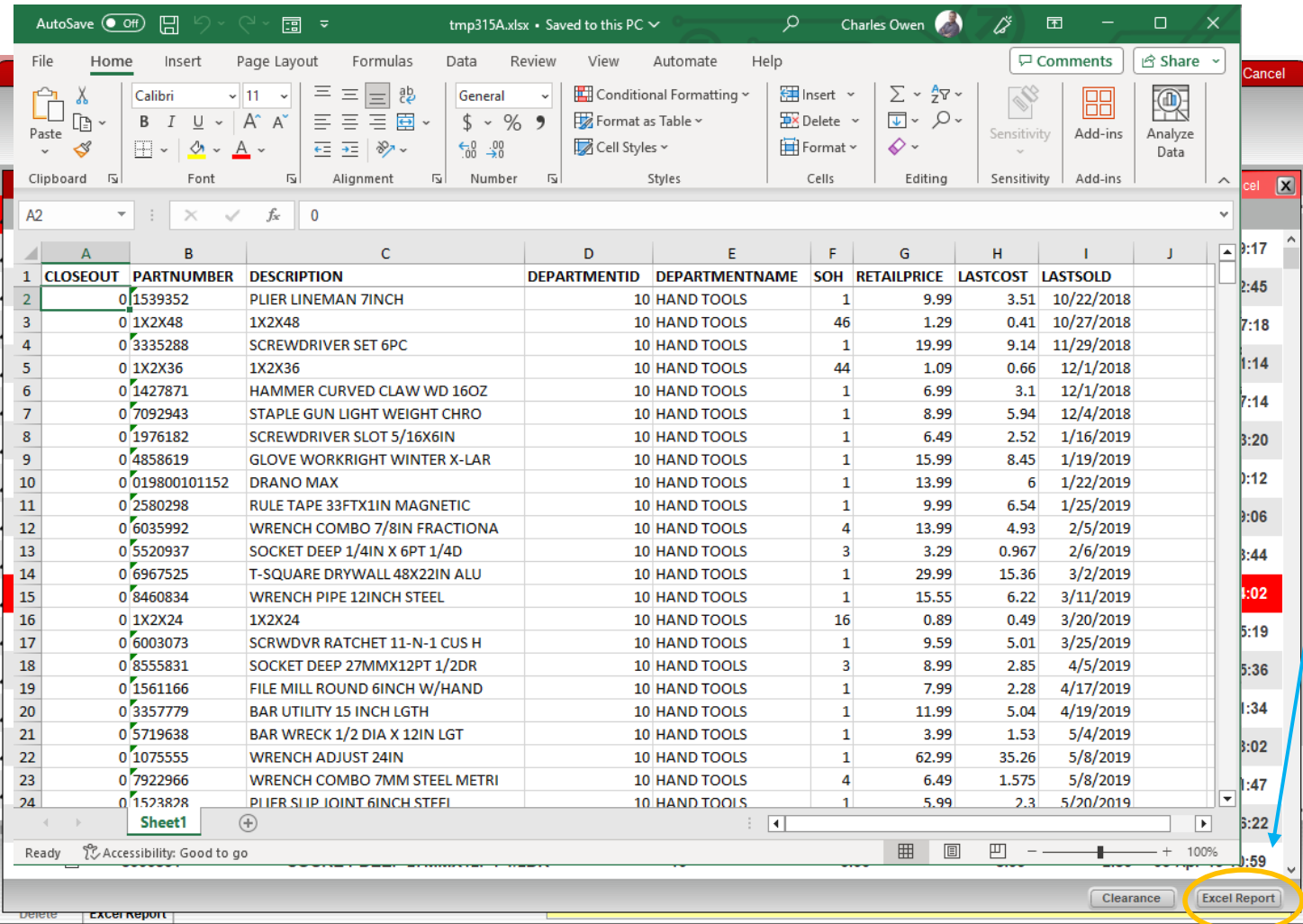
2. Sort by any of the column headers such as, **Last Sold, SOH, Retail Price, Unit Cost,** etc.

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)

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"
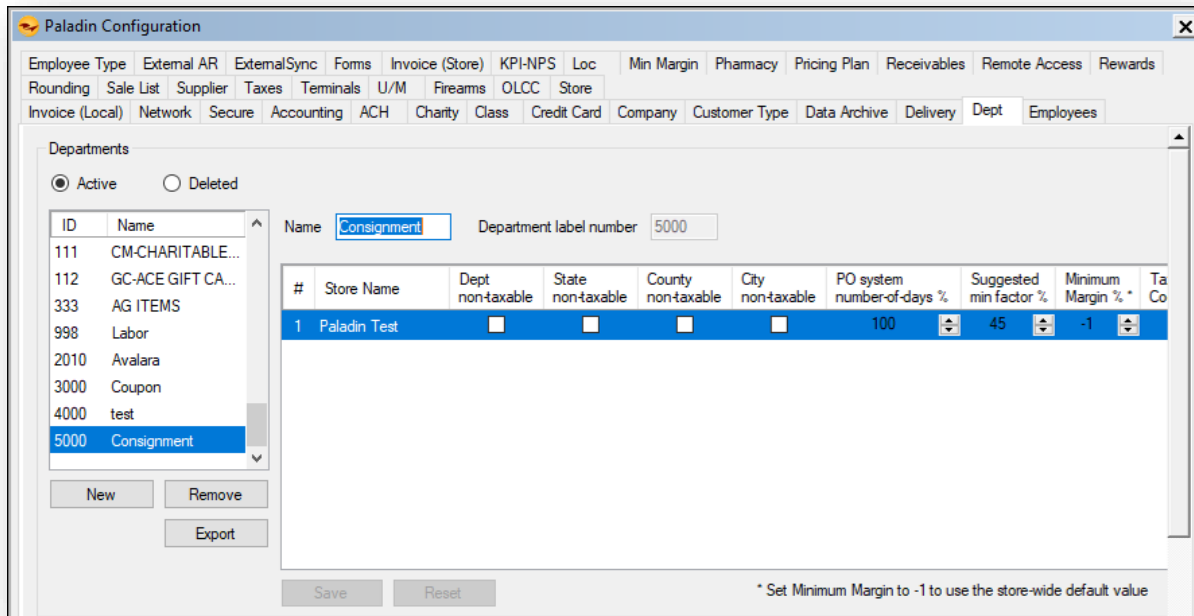
Selling on Consignment

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

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 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

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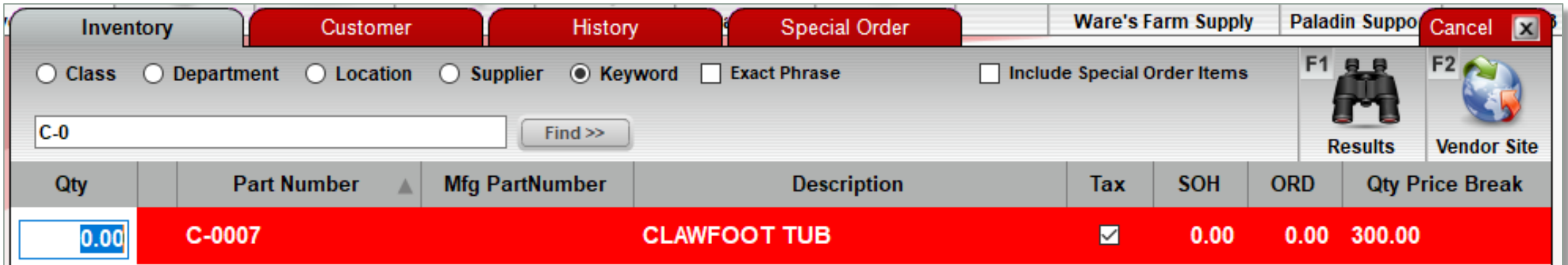
1. Open the **Pricing** tab.
2. In the **Pricing Levels** pane, add a price and a **Ref** margin.
3. Click **F12 Save** and exit the Inventory module.

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**

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.
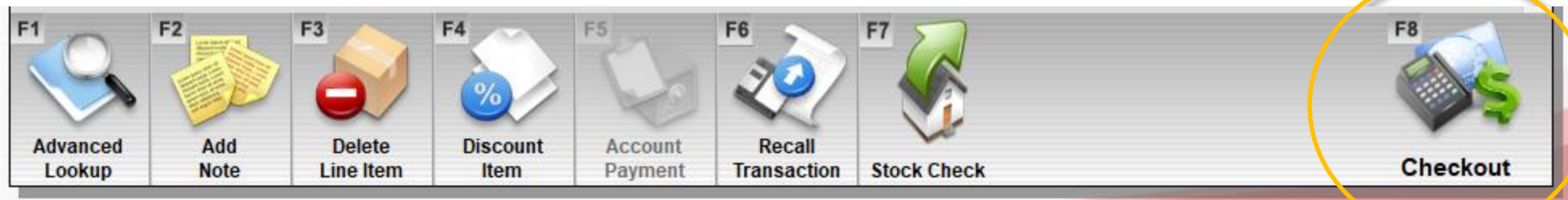
Reporting on consignment items and consignment customers/suppliers
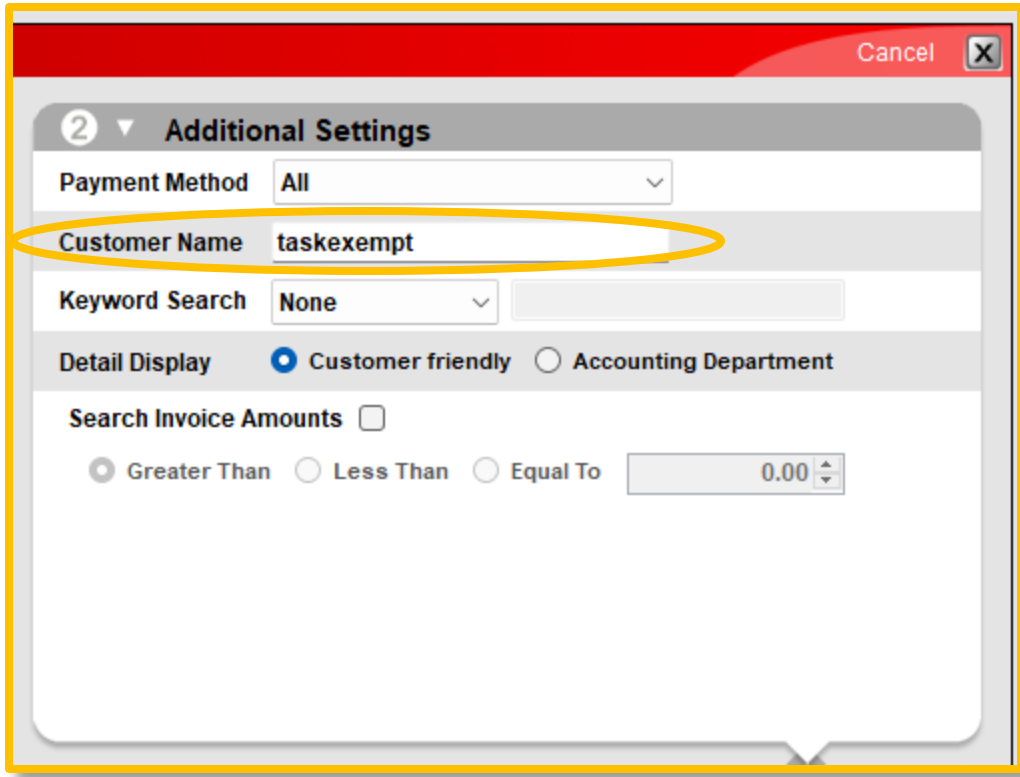
There are several reports that can help track consignment items, including:

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

Little-known reports in Paladin

Itemized tax exemption transaction report

- 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.

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All Items Report

- 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.
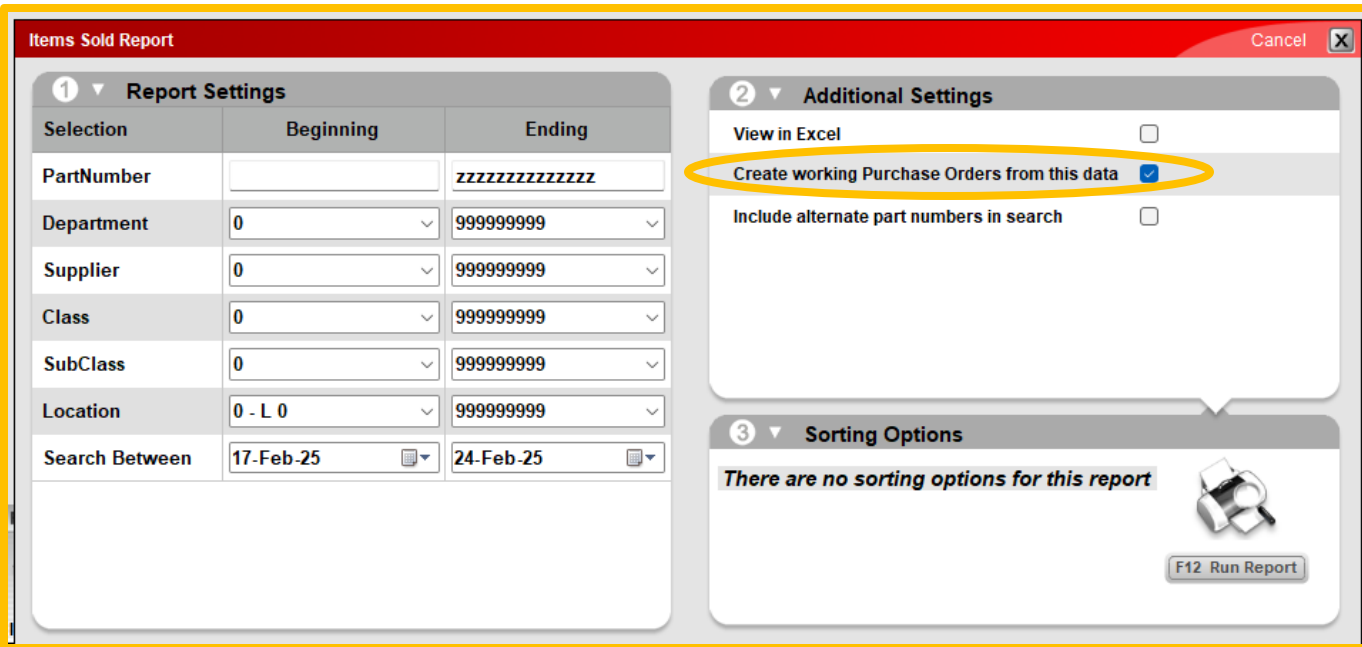
Restricted items transaction report

- 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.
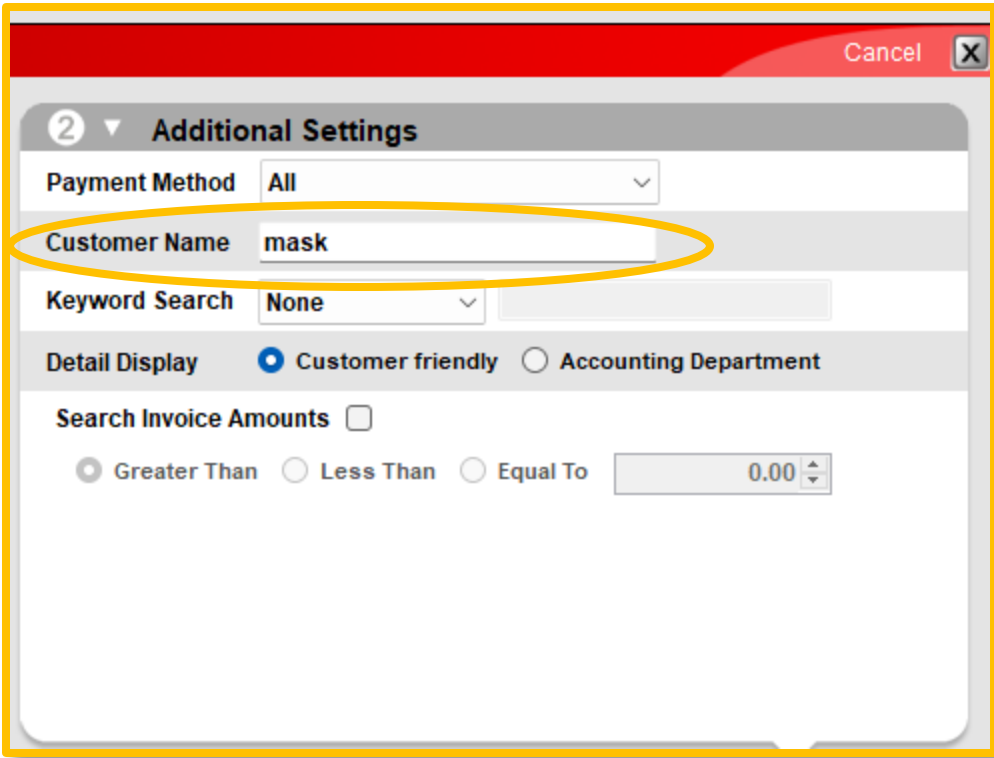
Items Sold Report – Replenishment ordering

- 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
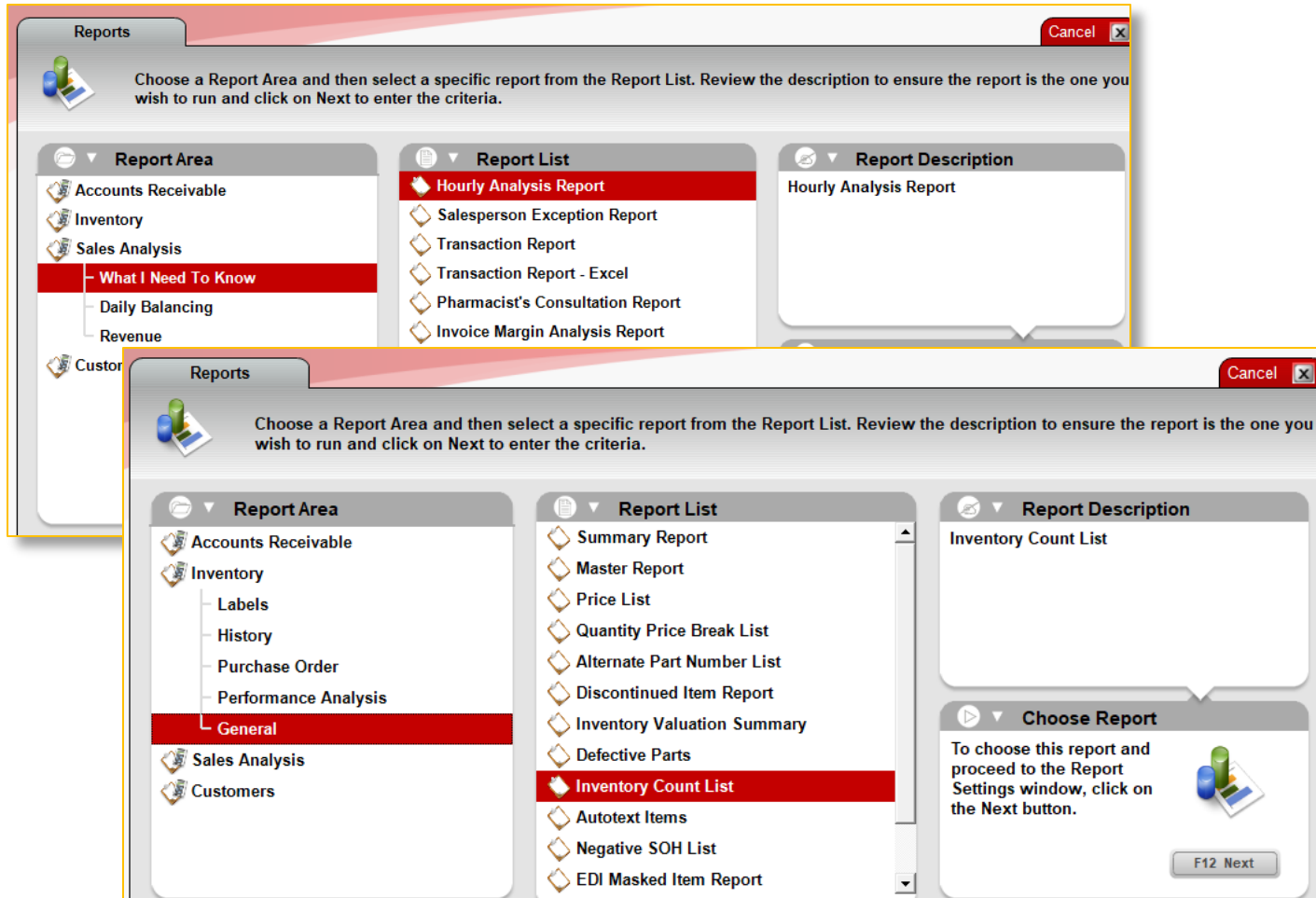
- Hourly Analysis Report
  - See when your store is the busiest and what hours may require more resources.

- 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 PaladinNsight 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
https://portal.paladinpos.com/webinars/

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