



Discover What's New in Paladin!

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May 13, 2025

WHAT YOU'LL LEARN

- Remote Manager Approval
 - Allows managers to provide approvals from anywhere
 - Speeds customer checkout
- triPOS Credit Card Processing
 - Offers client portal
 - Complies with Visa's FSA/HSA requirements
- PaladinCloud
- Search PO's by customer account number
- Weight Analyst
- Available Rewards Coupons

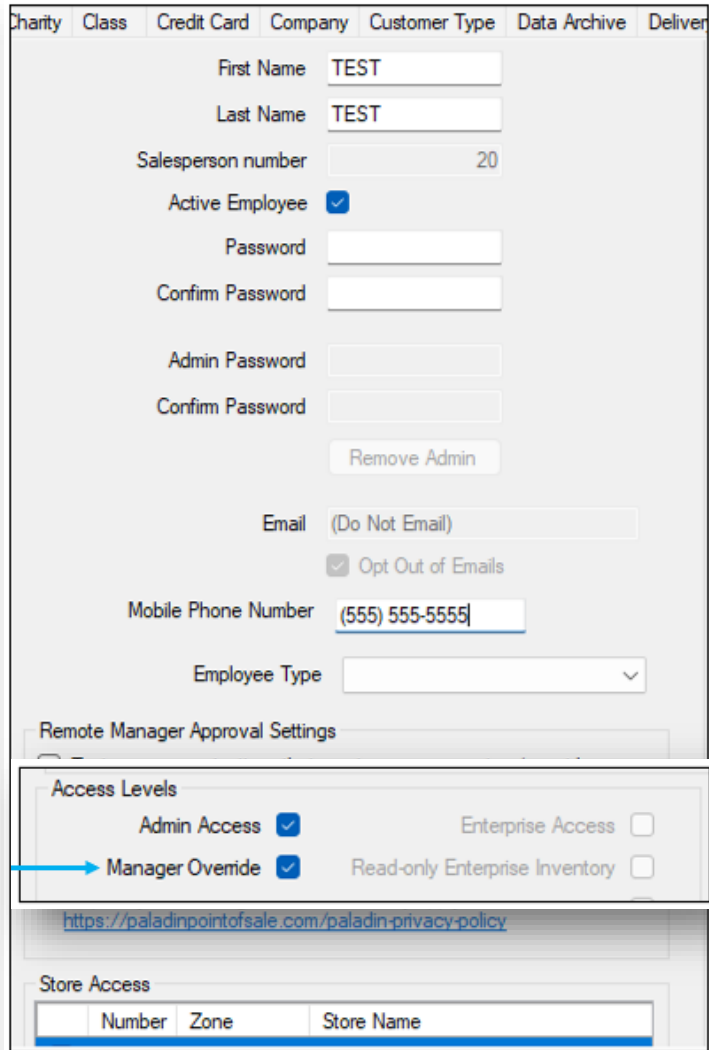
Remote Manager Approval



- Store managers are often busy and not readily available to approve cash and credit sales at the checkout counter.
- Our new Remote Manager Approval sends text messages to their cell phone describing the need for approval along with a link that allows the manager to approve or deny the request.
- This means the manager can continue working and doesn't need to drop everything and come running to checkout.

Remote Manager Approval Set Up

1. In Paladin, select **File > Setup**.
2. Select the **Employees** tab.
3. Enter your mobile phone number in the **Mobile Phone Number** field.
4. In the **Remote Manager Approval Settings** pane, check **Text me communications that require manager review/override**.
5. Under the **Access Levels** pane, enable **Manager Override**.
6. Click **Save**, then click **Close**.

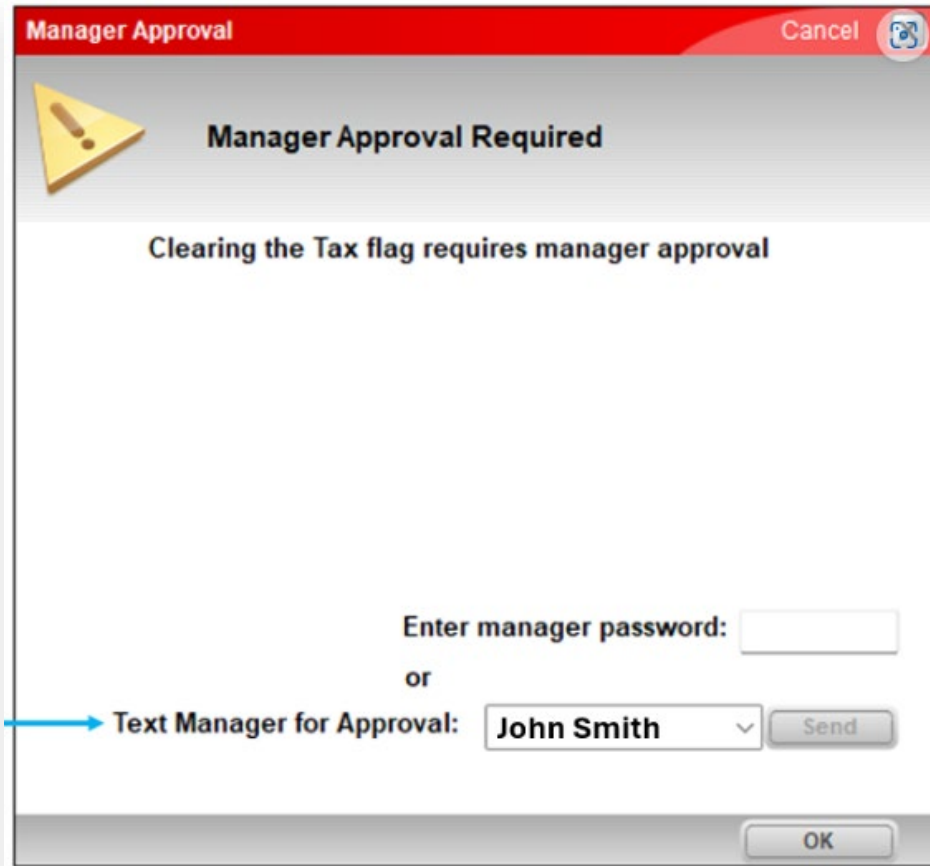


The screenshot shows the 'Remote Manager Approval Settings' form in the Paladin software. The form includes fields for 'First Name' (TEST), 'Last Name' (TEST), 'Salesperson number' (20), 'Active Employee' (checked), 'Password', 'Confirm Password', 'Admin Password', 'Confirm Password', 'Remove Admin' button, 'Email' (Do Not Email), 'Opt Out of Emails' (checked), 'Mobile Phone Number' ((555) 555-5555), and 'Employee Type' (dropdown). Below these fields is the 'Remote Manager Approval Settings' section, which includes the 'Access Levels' pane. In the 'Access Levels' pane, 'Admin Access' and 'Manager Override' are checked, while 'Enterprise Access' and 'Read-only Enterprise Inventory' are unchecked. A blue arrow points to the 'Manager Override' checkbox. At the bottom of the form, there is a link to the privacy policy and a 'Store Access' section with a table for 'Number', 'Zone', and 'Store Name'.

Number	Zone	Store Name
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Remote Manager Approval Set Up

When all is set up, the following updated **Manager Approval** window opens in Paladin.



Manager Approval

Cancel

Manager Approval Required

Clearing the Tax flag requires manager approval

Enter manager password:

or


Text Manager for Approval:

OK

1. Select the manager needed, or enter their name, from the **Text Manager for Approval** list.
 2. Press **Send**.
- The following Manager Approval request appears as a text message:
 - A Manager Approval has been requested by [EMPLOYEE NAME] at [TERMINAL NUMBER]. Click the link to reply.

Remote Manager Approval Message

- The link opens the **Paladin Remote Manager Approval** website where you accept or deny the request.
- After you approve or deny the request, the decision is shown on the invoice.



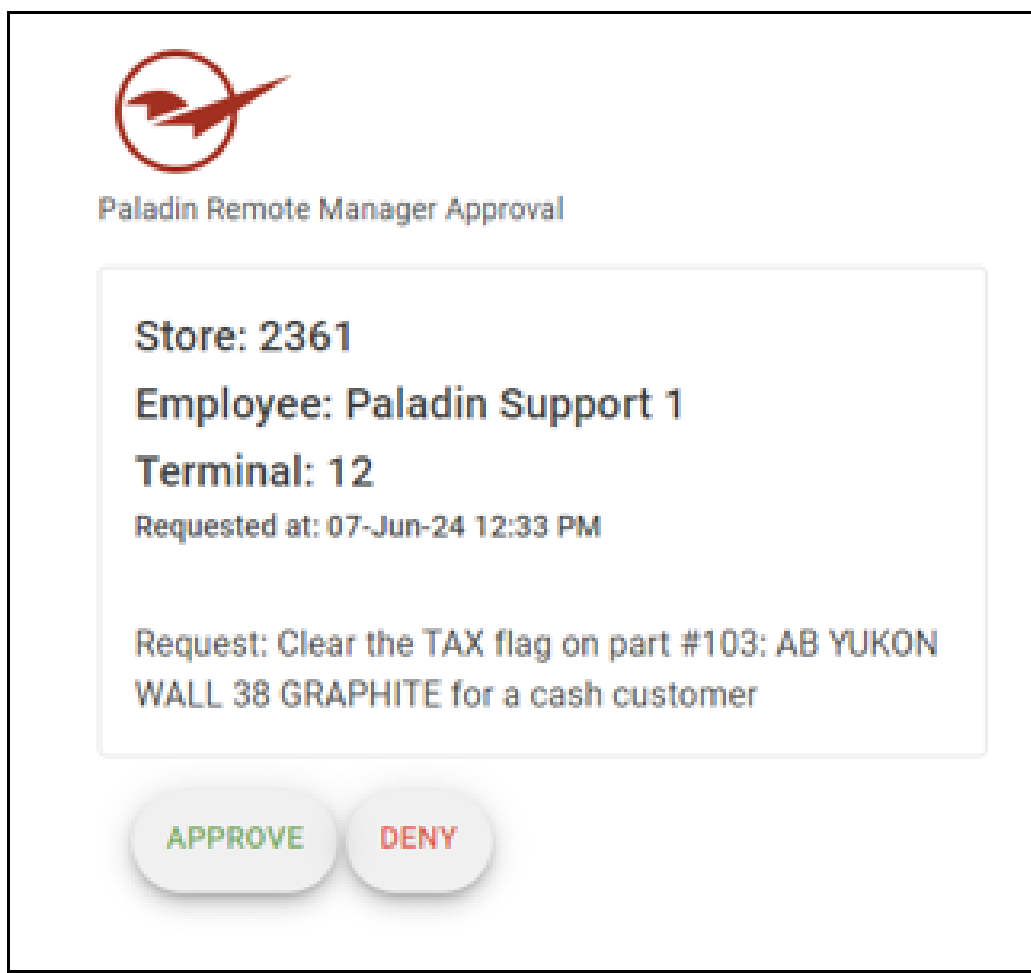
Paladin Remote Manager Approval

Store: 2361
 Employee: Paladin Support 1
 Terminal: 12
 Requested at: 07-Jun-24 12:33 PM

Request: Clear the TAX flag on part #103: AB YUKON WALL 38 GRAPHITE for a cash customer

APPROVE
DENY

Invoice / Quote			Checkout	
Rewards <input type="text"/>		Customer <input type="text"/>		Address 2
Credit <input type="text"/>		Address 1 <input type="text"/>		City/State/Zip
Tax	Def	Net	Part Number	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0004	<div style="text-align: center; font-size: 2em; font-weight: bold;">1</div> TEST PRODUCT VERY GOOD ITEM <div style="color: red; font-weight: bold;">25.09</div>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0004	
-7		52		
<div style="display: flex; align-items: center;"> → Mgr 24 override on Tax flag </div>				



Paladin Remote Manager Approval

Store: 2361
Employee: Paladin Support 1
Terminal: 12
Requested at: 07-Jun-24 12:33 PM

Request: Clear the TAX flag on part #103: AB YUKON WALL 38 GRAPHITE for a cash customer

APPROVE DENY

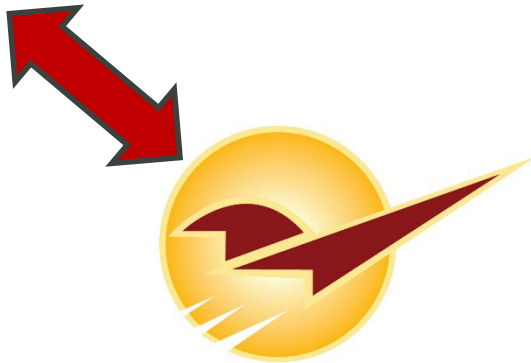
Potential actions requiring Manger Approval

The following shows the modules that participate in remote manager approvals.

- Serial Numbers
- Inventory
- Customers
- Invoice
- Returns
- Overrides

triPOS from Worldpay

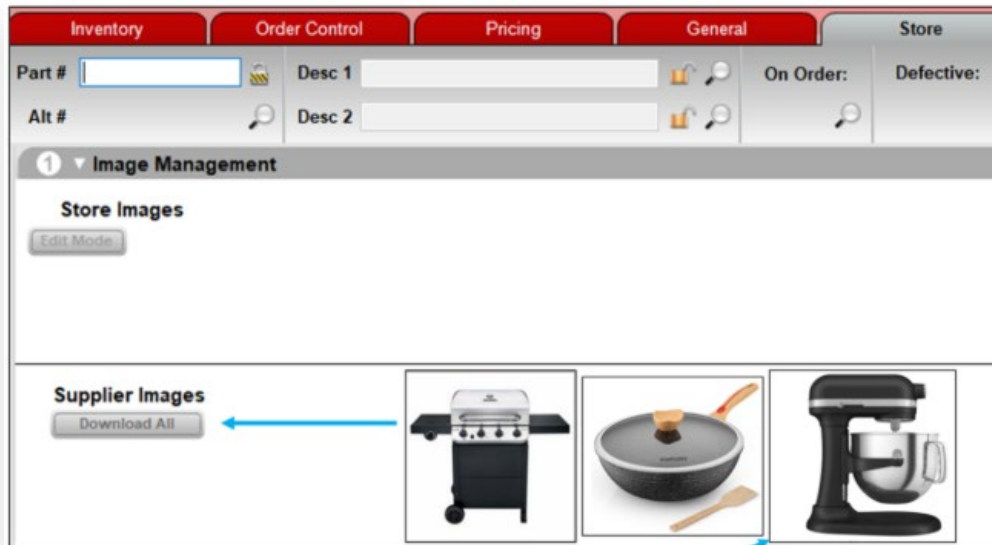
worldpay



PALADIN[™]
DATA CORPORATION

- triPOS is the latest technology from Worldpay.
- It offers hassle-free payment integration that makes PCI compliance easier and simplifies complex certifications like EMV.
- This new triPOS integration may be required for certain features to be activated in Paladin such as, PaladinShop, FSA/HSA EMV.

Paladin Cloud™



- Paladin provides cloud-based storage for documentation, invoice signatures, images and videos, and also includes document scanning tools and built-in document retention features.

- PO Documents
- Customer Documents
- Delivery Images
- Invoice Signatures
- Store's Inventory Images
- Supplier's Inventory Images

Search PO's by customer account number

1 ▼ PO Details

Enter the PO details below:

☐ All POs
☒ Open POs
☐ Closed POs

Supplier

PO #

From Date


To Date

Part #

Sort Recalled PO Part #'s By:

☐ Default
☐ Ascending
☐ Descending

S/O Cust



- When a Special Order is created a customer is assigned to the purchase order.
- You can now search your PO's by customer account number to easily find all PO's for a specific customer.

Weight Analyst

- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Weight Analyst (Alt + W)**
- 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)

The screenshot displays a retail point-of-sale (POS) system interface. A red "Weight Analyst" dialog box is open, overlaying part of the main screen. The dialog has a title bar with "Weight Analyst" and a "Cancel" button. It contains a table with three columns: "Item", "Unit", and "Weight".

Item	Unit	Weight
Current Line	1 @ 3.80	3.80
Invoice	-	6.25

Below the dialog, the main POS screen shows a list of items with their prices. The visible items are:

- ULB LED A19 10YR 27K 4PK 75 BX 1 \$ 15.99 \$ 15.99
- MINT RST OBS IN EX SG WHT Q EA 1 \$ 16.99 \$ 16.99
- ULB LED A19 10YR 5K 4PK 75W BX 1 \$ 15.99 \$ 15.99
- EATER INFRARED QUARTZ W/RC EA 1 \$ 169.99 \$ 169.99

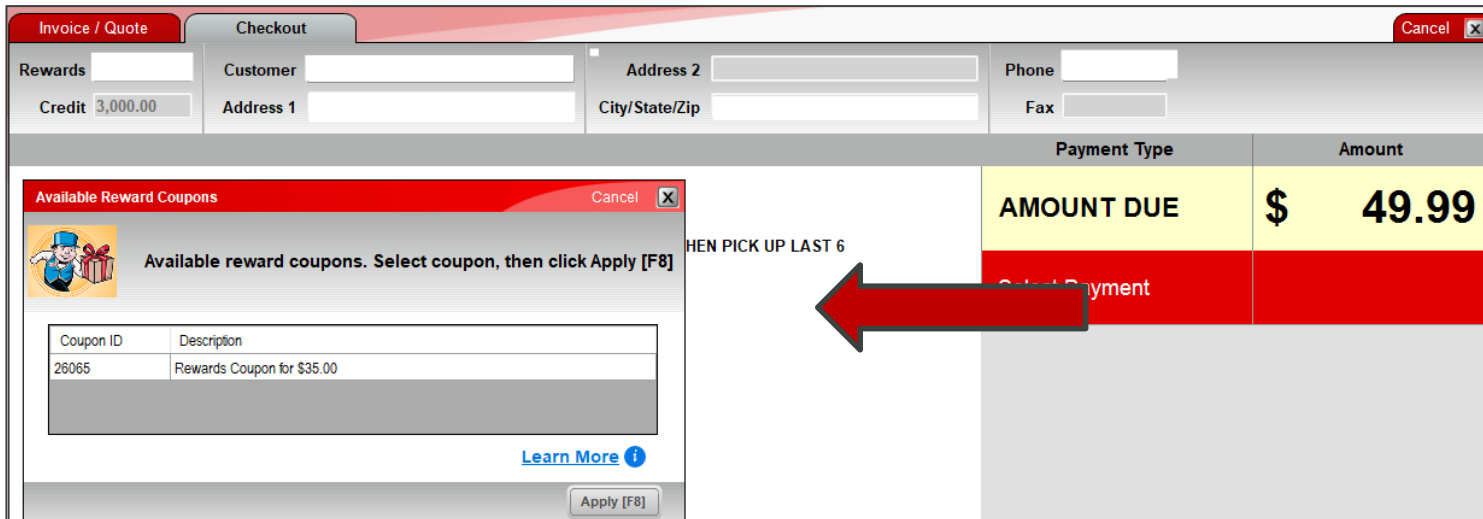
At the bottom of the screen, there is a row of function keys (F4-F8) with corresponding icons and labels:

- F4: Discount Item (percentage icon)
- F5: Account Payment (wallet icon)
- F6: Store Transaction (store icon with arrow)
- F7: Stock Check (green arrow icon)
- F8: Checkout (calculator and dollar sign icon)

- If an item has a weight attributed to it in the inventory module you can now analyze an invoice or purchase order to determine the total weight of the products on that invoice.
- It helps determine the appropriate truck needed for a delivery or if a customer has the right vehicle to deliver the load.

Available Rewards Coupons

- At checkout, a list of available coupons will be presented to the cashier.
- The cashier can apply the discount coupon(s) by selecting the coupon.
- This feature can be disabled if desired.



Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone

Credit 3,000.00 Address 1 City/State/Zip Fax

Available Reward Coupons Cancel

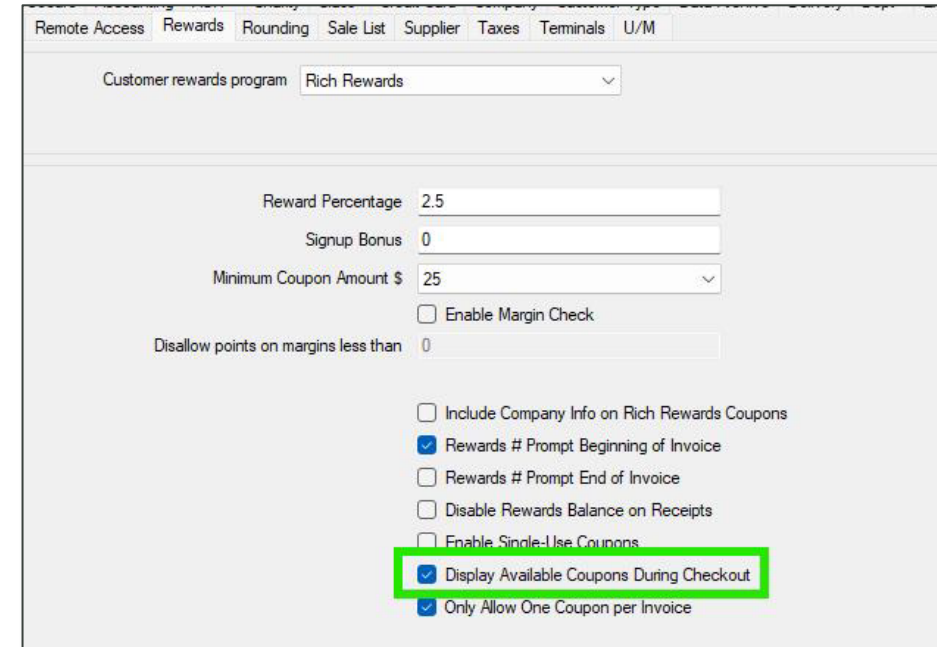
Available reward coupons. Select coupon, then click Apply [F8]

Coupon ID	Description
26065	Rewards Coupon for \$35.00

[Learn More](#)

Apply [F8]

AMOUNT DUE \$ 49.99



Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M

Customer rewards program Rich Rewards

Reward Percentage 2.5

Signup Bonus 0

Minimum Coupon Amount \$ 25

Disallow points on margins less than 0

☐ Enable Margin Check

☐ Include Company Info on Rich Rewards Coupons

☒ Rewards # Prompt Beginning of Invoice

☐ Rewards # Prompt End of Invoice

☐ Disable Rewards Balance on Receipts

☐ Enable Single-Use Coupons

☒ Display Available Coupons During Checkout

☒ Only Allow One Coupon per Invoice

Learn More

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

- [Remote Manager Approval](#)
- [triPOS](#)
- [Paladin Cloud™](#)

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

Next Webinar:

Paladin and QuickBooks:

A match made in bookkeeping heaven

May 27

9am PT

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