



Winter Release Offers New Ways to Put Your Data to Work

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Chief Experience Officer
November 19, 2019

WHAT YOU'LL LEARN

New Release

- Winter 2019/2020 Release
- Introducing Chat Support!

New Features

- Sell by Weight
- Purchase Orders and Order Analyst
- BOGO Promotions
- Comprehensive Serial Number Tracking
- New Statement Generation Option
- Comparative Revenue Report Grouping
- Auto-print Yard Orders
- New Inventory Item Report

New Integrations

- Pointy
- Sage Accounting
- Point of Rental

Winter 2019/2020 Release

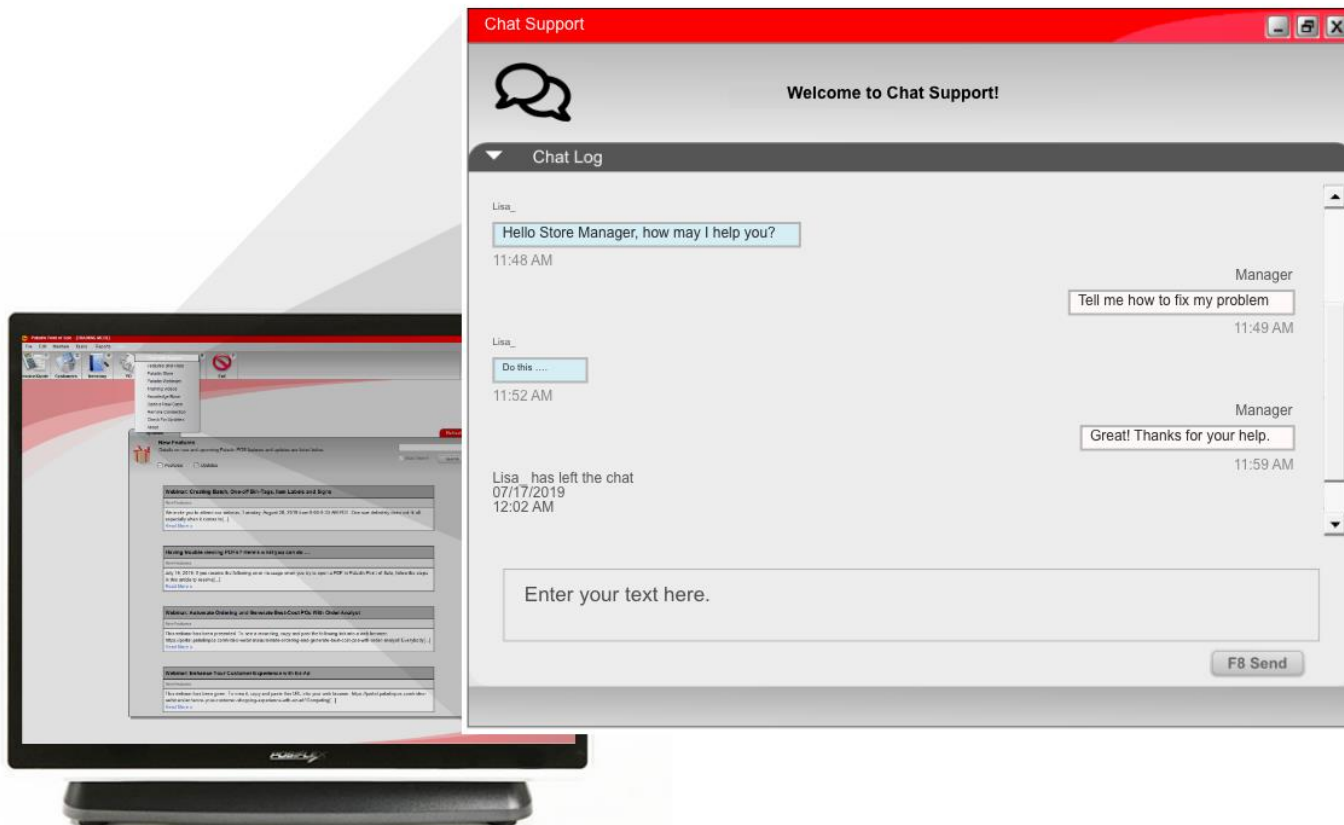
Technology Built for Your Business



Winter 2019/2020 Release. View the Tech Buzz link below:

<https://portal.paladinpos.com/news/tech-buzz/>

Chat Support



Help from our expert technicians is now just a couple of clicks away where you need it most – directly in Point of Sale. Simply click “Help” in the top menu bar and select “Chat Support” to get your questions answered and challenges addressed quickly and easily.

New Features

Sell Products by Weight



Cardinal Detecto
APS30 digital scale

- Price bulk items like nuts, bolts, flour, fruit, seed and feed by weight at checkout with new scale and scanner-scale options.

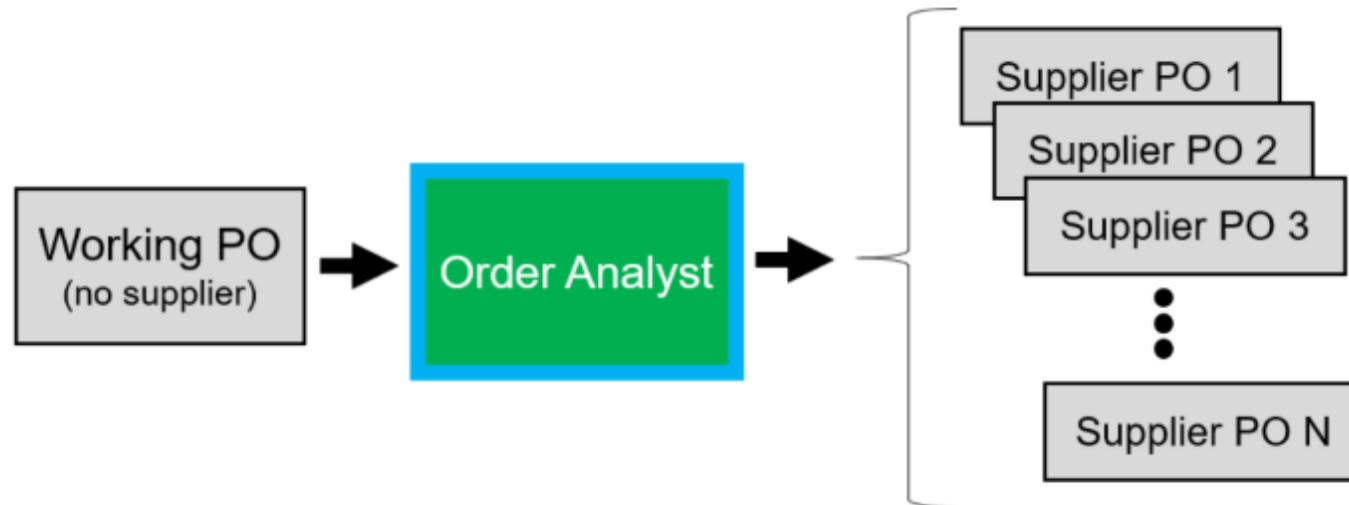


Magellan 9800i
Scanner Scale

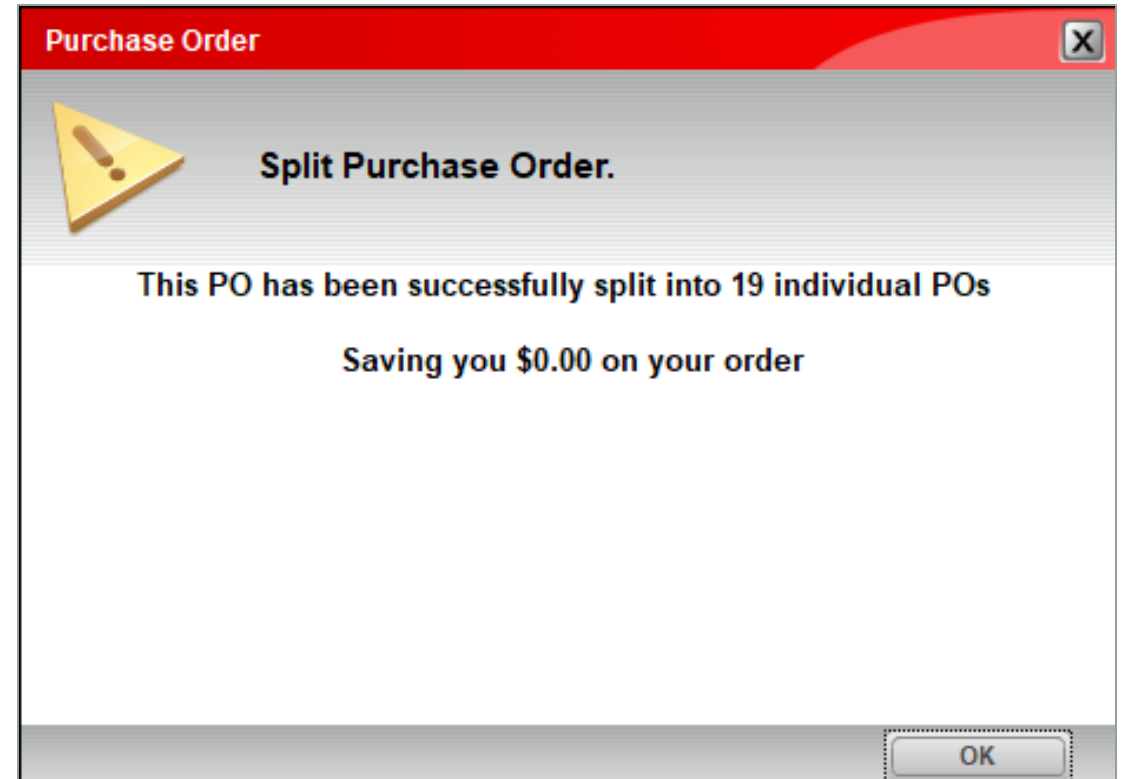
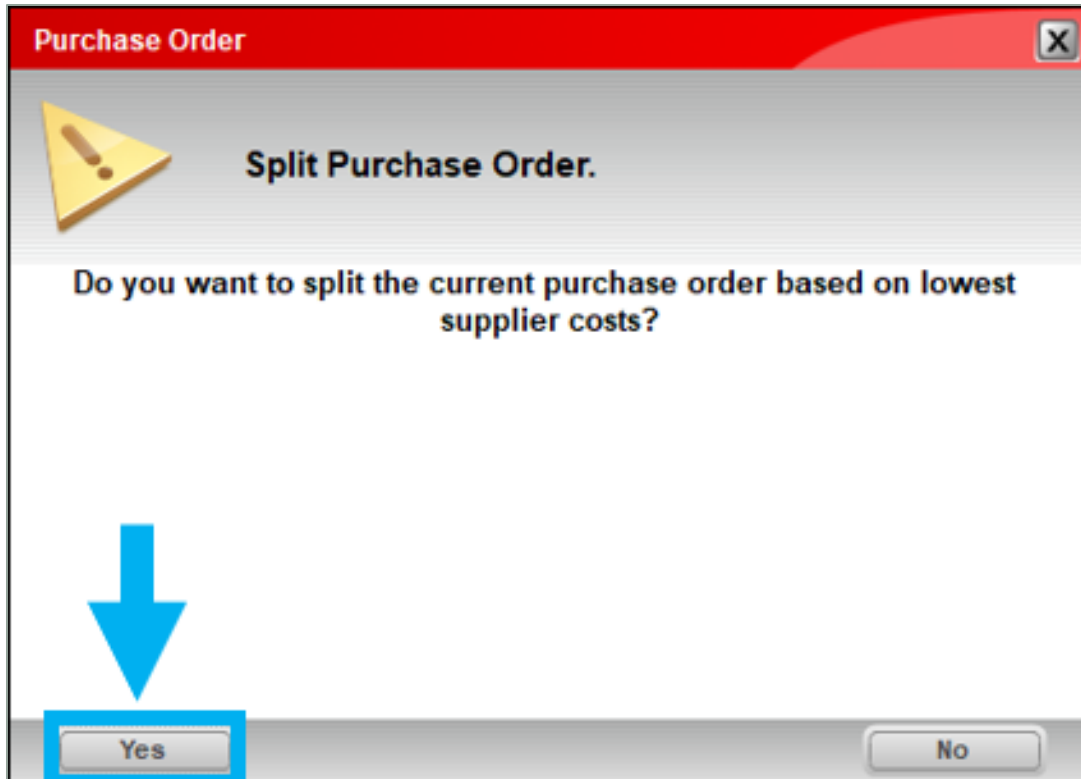
- Fully-integrated with Paladin, these high-performance digital devices make selling items by weight easy and precise.

Purchase Orders: Order Analyst Part 1 (Split PO)

Instantly create ready-to-buy supplier purchase orders for suggested order items or a *purchase order without a selected supplier* with Order Analyst.



Purchase Orders: Order Analyst Part 1 (Split PO)



Purchase Orders: Order Analyst Part 1 (Split PO)



Purchase Order **Confirm PO** Cancel

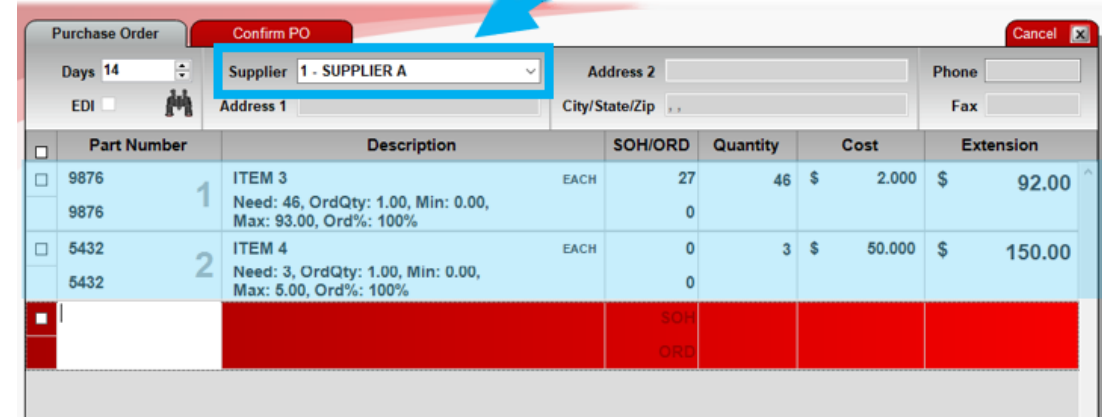
Days 14 Supplier Address 2 Phone
EDI Address 1 City/State/Zip Fax

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
1234 1	ITEM 1 Need: 74, OrdQty: 1.00, Min: 0.00, Max: 110.00, Ord%: 100%	EACH 13	74	\$ 10.000	\$ 740.00
5678 2	ITEM 2 Need: 32, OrdQty: 1.00, Min: 0.00, Max: 84.00, Ord%: 100%	EACH 34	32	\$ 5.000	\$ 160.00
9876 3	ITEM 3 Need: 46, OrdQty: 1.00, Min: 0.00, Max: 93.00, Ord%: 100%	EACH 27	46	\$ 2.000	\$ 92.00
7890 4	ITEM 5 Need: 306, OrdQty: 1.00, Min: 0.00, Max: 818.00, Ord%: 100%	EACH 347	306	\$ 20.000	\$ 6,120.00
5432 5	ITEM 4 Need: 3, OrdQty: 1.00, Min: 0.00, Max: 5.00, Ord%: 100%	EACH 0	3	\$ 50.000	\$ 150.00

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

Total \$ 7,262.00

Order Analyst



Purchase Order **Confirm PO** Cancel

Days 14 Supplier **1 - SUPPLIER A** Address 2 Phone
EDI Address 1 City/State/Zip Fax

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
9876 1	ITEM 3 Need: 46, OrdQty: 1.00, Min: 0.00, Max: 93.00, Ord%: 100%	EACH 27	46	\$ 2.000	\$ 92.00
5432 2	ITEM 4 Need: 3, OrdQty: 1.00, Min: 0.00, Max: 5.00, Ord%: 100%	EACH 0	3	\$ 50.000	\$ 150.00



Purchase Order **Confirm PO** Cancel

Days 14 Supplier **2 - SUPPLIER B** Address 2 Phone
EDI Address 1 City/State/Zip Fax

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
1234 1	ITEM 1 Need: 74, OrdQty: 1.00, Min: 0.00, Max: 110.00, Ord%: 100%	EACH 13	74	\$ 10.000	\$ 740.00
5678 2	ITEM 2 Need: 32, OrdQty: 1.00, Min: 0.00, Max: 84.00, Ord%: 100%	EACH 34	32	\$ 5.000	\$ 160.00
7890 3	ITEM 5 Need: 306, OrdQty: 1.00, Min: 0.00, Max: 818.00, Ord%: 100%	EACH 347	306	\$ 20.000	\$ 6,120.00

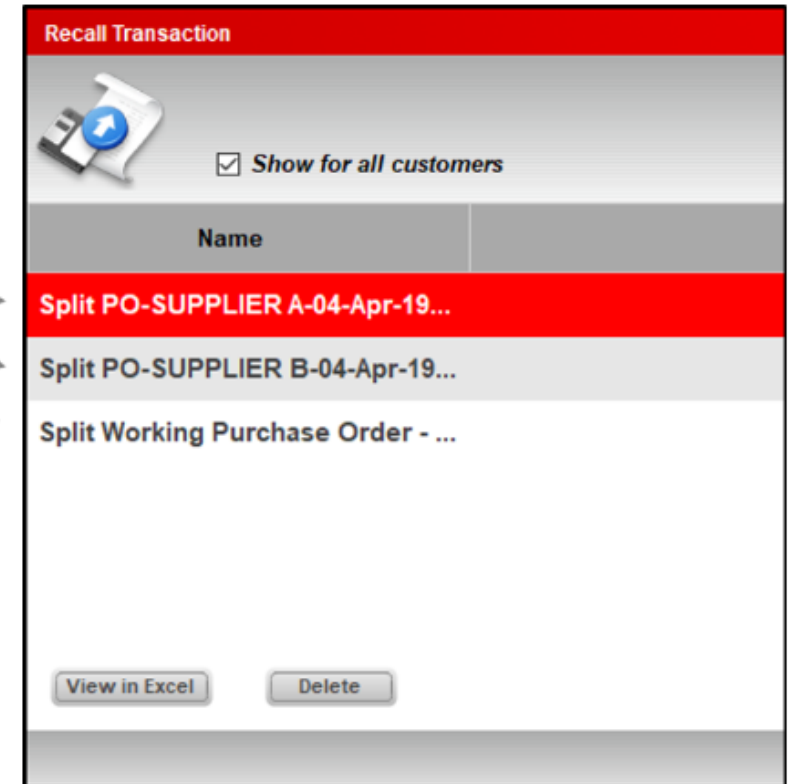
Items are split based on their Primary Supplier, **Supplier 1**.

Purchase Orders: Order Analyst Part 1 (Split PO)

After the individual supplier purchase orders are created, a completion message appears and the original and new purchase order names have the prefix **Split**.

Supplier POs
created by
Order Analyst

Original PO

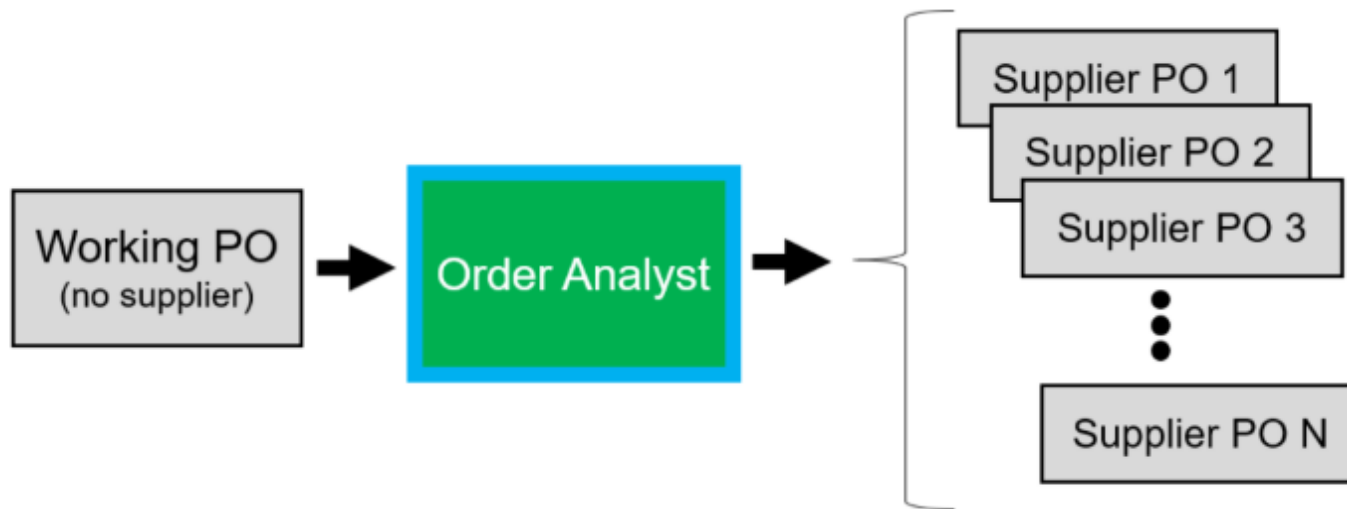


The screenshot shows a software window titled "Recall Transaction". It features a search icon and a checkbox labeled "Show for all customers" which is checked. Below this is a table with a header row containing the word "Name". The table lists three items: "Split PO-SUPPLIER A-04-Apr-19..." (highlighted in red), "Split PO-SUPPLIER B-04-Apr-19...", and "Split Working Purchase Order - ...". At the bottom of the window are two buttons: "View in Excel" and "Delete".

Name
Split PO-SUPPLIER A-04-Apr-19...
Split PO-SUPPLIER B-04-Apr-19...
Split Working Purchase Order - ...

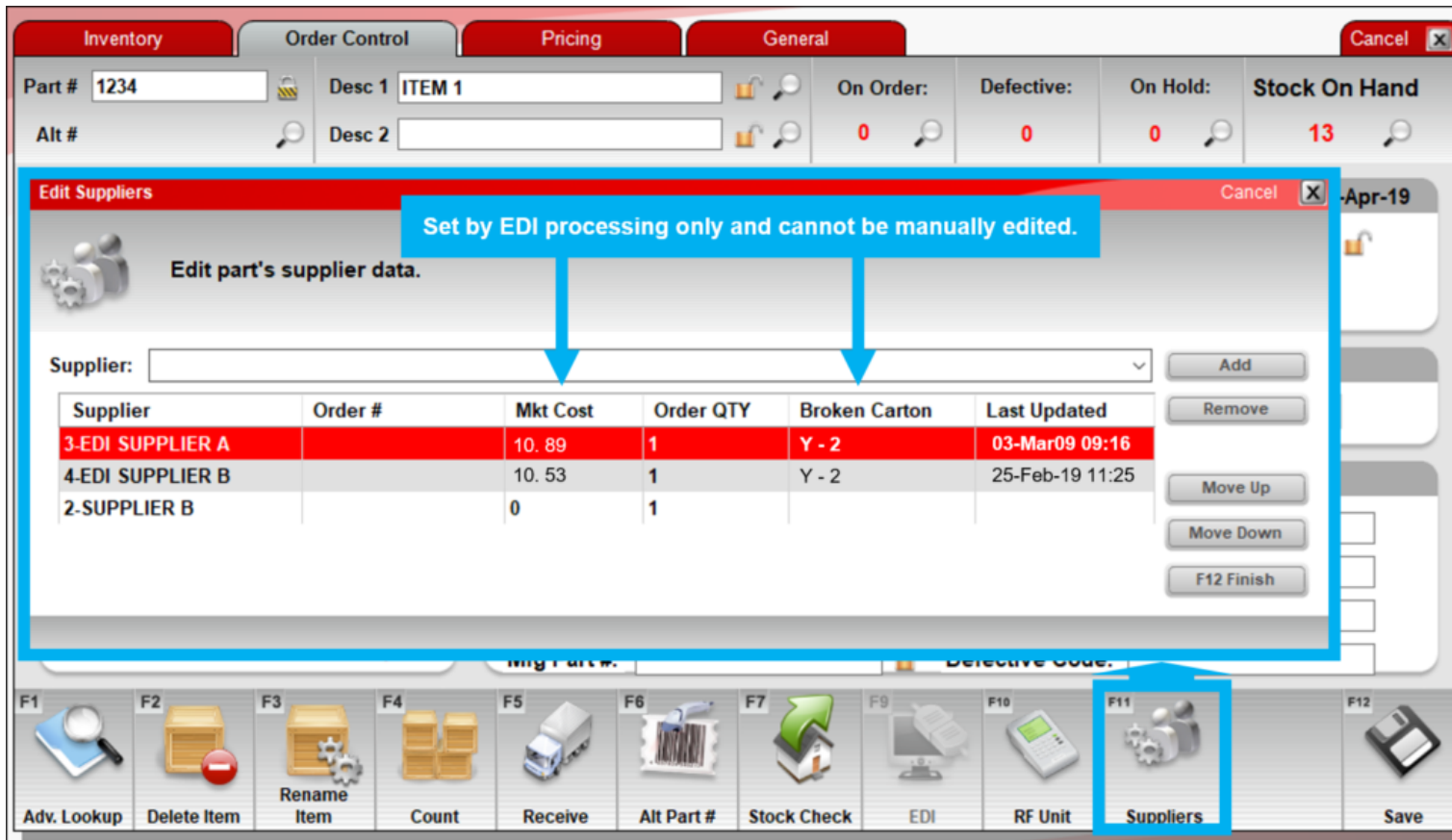
Purchase Orders: Order Analyst Part 2 (Best cost)

Compare supplier costs across your EDI systems automatically and always order from the lowest-cost EDI supplier with Order Analyst.



Note: The lowest-cost EDI Supplier feature is currently available for limited Suppliers.

Purchase Orders: Order Analyst Part 2 (Best cost)



Edit Suppliers

Set by EDI processing only and cannot be manually edited.

Supplier:

Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated
3-EDI SUPPLIER A		10.89	1	Y - 2	03-Mar09 09:16
4-EDI SUPPLIER B		10.53	1	Y - 2	25-Feb-19 11:25
2-SUPPLIER B		0	1		

Buttons: Add, Remove, Move Up, Move Down, F12 Finish

Bottom Toolbar: F1 Adv. Lookup, F2 Delete Item, F3 Rename Item, F4 Count, F5 Receive, F6 Alt Part #, F7 Stock Check, F9 EDI, F10 RF Unit, **F11 Suppliers**, F12 Save

Mkt Cost and **Broken Carton** code are auto-populated through EDI the first time EDI is processed after this update.

IMPORTANT:

If only one EDI vendor exists on the inventory item, Order Analyst orders from the EDI vendor, whether it was cheaper than a non-EDI supplier or not.

BOGO's



***BUY ONE
GET ONE***

- Buy One, Get One discounts are hands-down the most popular sales promotions in the retail industry.
- Paladin's BOGO feature lets you design and customize your own BOGO sales.
- See Pricing Plans and follow the built-in wizard under "Enable Advanced Settings" section.

BOGO Screen Shot

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 Hometown Hardware 9 Paladin Support NOV 2019 01 01-Nov-19

Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone
 Credit Address 1 City/State/Zip Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31899	BULB RGH SER 500W 118MM EACH	2	\$ 5.99	\$ 11.98
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31899	5.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		BUY 1 GET 1 FREE	-1	5.99	-5.99
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

SOH ORD

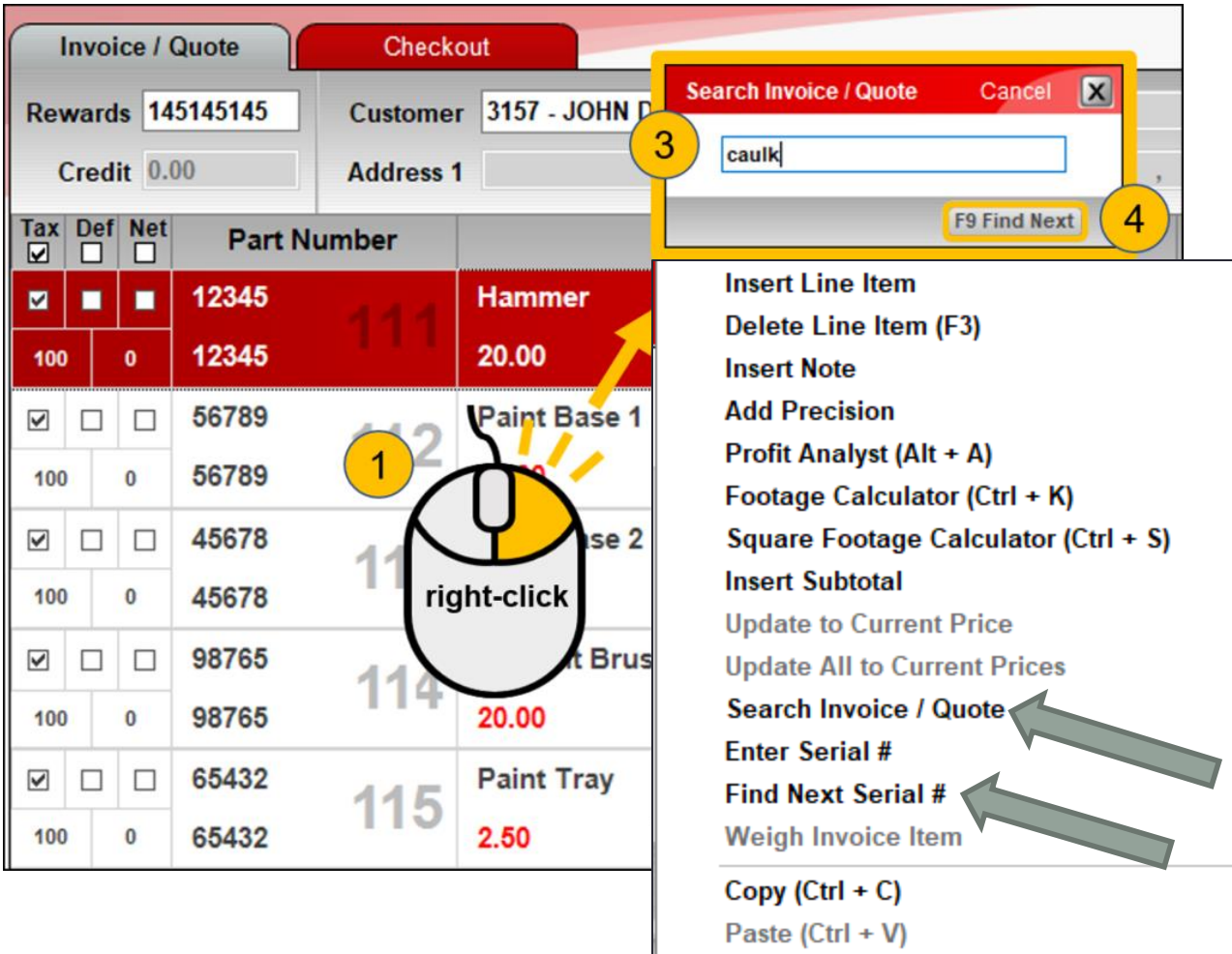
F1 Advanced Lookup F2 Add Note F3 Delete Line Item F4 Discount Item F5 Account Payment F6 Store Transaction F7 Stock Check F8 Checkout

Track Serial Numbers in Paladin



- Track serial numbered items when receiving and selling serialized equipment.
- See “sold vs. available” reports of serialized products.
- Choose from list of available serial numbers when selling products.
- Track unique receiving costs for each serialized number.

Invoice & Quote: Right-click search feature



Invoice / Quote **Checkout**

Rewards: 145145145 Customer: 3157 - JOHN D
Credit: 0.00 Address 1:

Tax	Def	Net	Part Number	Description	Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12345	Hammer	20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12345	Hammer	20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	56789	Paint Base 1	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	56789	Paint Base 1	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45678	Paint Base 2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45678	Paint Base 2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	98765	Paint Base 3	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	98765	Paint Base 3	20.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	65432	Paint Tray	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	65432	Paint Tray	2.50

Search Invoice / Quote Cancel X

caulk

F9 Find Next

right-click

- 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
- Enter Serial #
- Find Next Serial #
- Weigh Invoice Item
- Copy (Ctrl + C)
- Paste (Ctrl + V)

- Quickly search for a part number or description with this new quick access (right-click) menu feature.
- Manage serial numbers.


Monitor Credit Limit Overrides

Manager overrides for exceeded credit limits appear on invoices and in the Salesperson Exception Report.

Account Warnings

Cancel

Manager approval needed...



- Exceeds credit limit by: **\$ 313,016.16**

Password

Next >>

STEP 1

STEP 2

COMPLETE

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 Paladin Hardware 9 Paladin Support 16-Apr-16

Reports

Choose a Report Area and then select a specific report from the Report List. Review the description to ensure the report is the one you wish to run and click on Next to enter the criteria.

Report Area

- Accounts Receivable
- Inventory
- Sales Analysis
 - What I Need To Know
 - Daily Balancing
 - Revenue
 - Customers

Report List

- Hourly Analysis Report
- Salesperson Exception Report**
- Transaction Report
- Transaction Report - Excel
- Pharmacist's Consultation Report
- Invoice Margin Analysis Report
- Sales Tax Details

2 Additional Settings

Cancel

Include price overrides? ☒

Include manual discounts? ☒

Include neg qty sold? ☒

Include Accounting Overrides? ☒

To choose this report and proceed to the Report Settings window, click on the Next button.

F12 Next

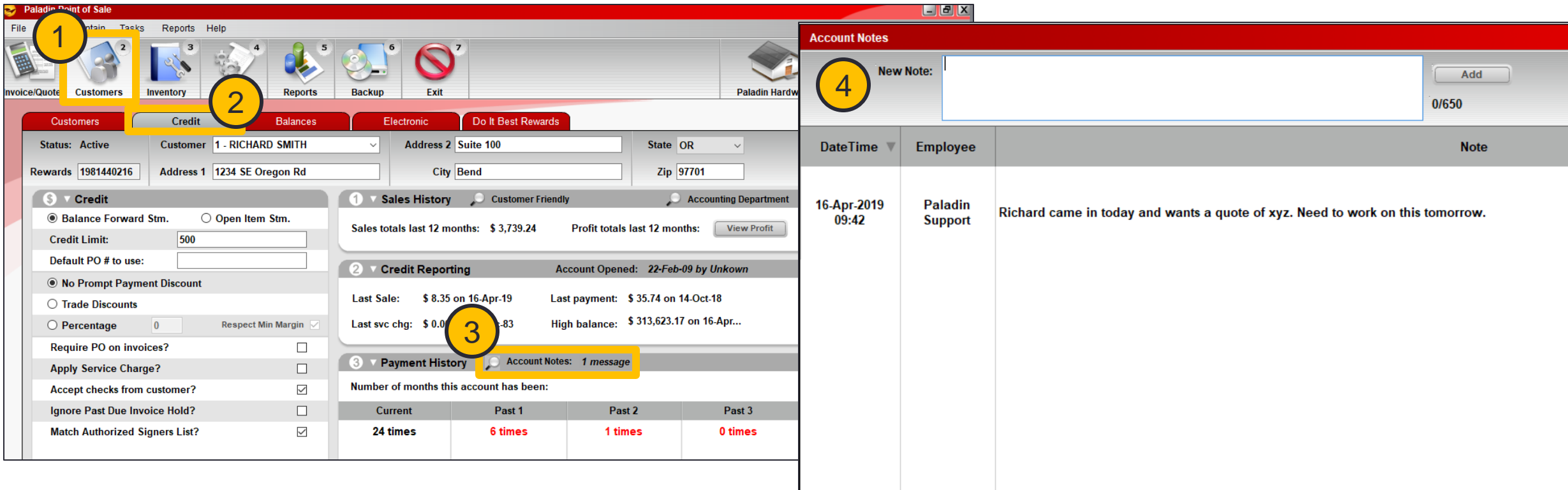
F1 NEG SOH LIST F2 ACE ORDER F3 SOILS MULCH F4 FASTENERS F5 FLEA STUFF F6 SALT F7 BWI F8 QUICK CRETE F9 None F10 Recall Reports F11 Create Preset

Date Stamp	
Ran On:	17-Apr-19
At:	08:12
Ran By	1

T	D	N											S	D			
A	E	E											E	I			
X	F	T	Scan Number	Description	Part #	Dept	Cost	Qty	Price One	Sell Price	Per Qty	Ext	Margin	L	C		
			RICHARD SMITH		Acct#:1	Inv:729912	Term:1	Sales Person:1		Disc Allowed:0.00		16-Apr-19 16:15			L	S	
X			17794	FINISH FLOOR 5 GAL ACE	17794	10	1712.10	30	99.99	94.99 /	1	2849.70	39.92%				
				Mgr 1 change due approval for		0	0.00										
				9310,332.33													
				Manager approval for accounting		0	0.00										
				override: 1													
			Account Number: 1 Name: Richard				1,712.10	CHANGE	315,467.00	SUB TOTAL		2849.70	39.92%				
			Memo:					CHANGE	-	TOTAL TAX		284.97					
									310,332.33	Grand TOTAL		3154.67					
			Manual Signature														

Customers: Account Notes

Add ongoing notes about a customer and maintain a historical record in their account. A new account note feature lets you enter, review and exchange detailed, time-stamped notes about a customer with your accountant and other employees.



Paladin Point of Sale

File Edit View Tools Reports Help

Invoice/Quote Customers Inventory Reports Backup Exit

Customers Credit Balances Electronic Do It Best Rewards

Status: Active Customer: 1 - RICHARD SMITH Address 2: Suite 100 State: OR

Rewards: 1981440216 Address 1: 1234 SE Oregon Rd City: Bend Zip: 97701

Credit

Balance Forward Stm. Open Item Stm.

Credit Limit: 500

Default PO # to use:

No Prompt Payment Discount

Trade Discounts

Percentage 0 Respect Min Margin

Require PO on invoices?

Apply Service Charge?

Accept checks from customer?

Ignore Past Due Invoice Hold?

Match Authorized Signers List?

1 Sales History Customer Friendly Accounting Department

Sales totals last 12 months: \$ 3,739.24 Profit totals last 12 months: View Profit

2 Credit Reporting Account Opened: 22-Feb-09 by Unknown

Last Sale: \$ 8.35 on 16-Apr-19 Last payment: \$ 35.74 on 14-Oct-18

Last svc chg: \$ 0.00 -83 High balance: \$ 313,623.17 on 16-Apr...

3 Payment History Account Notes: 1 message

Number of months this account has been:

Current	Past 1	Past 2	Past 3
24 times	6 times	1 times	0 times

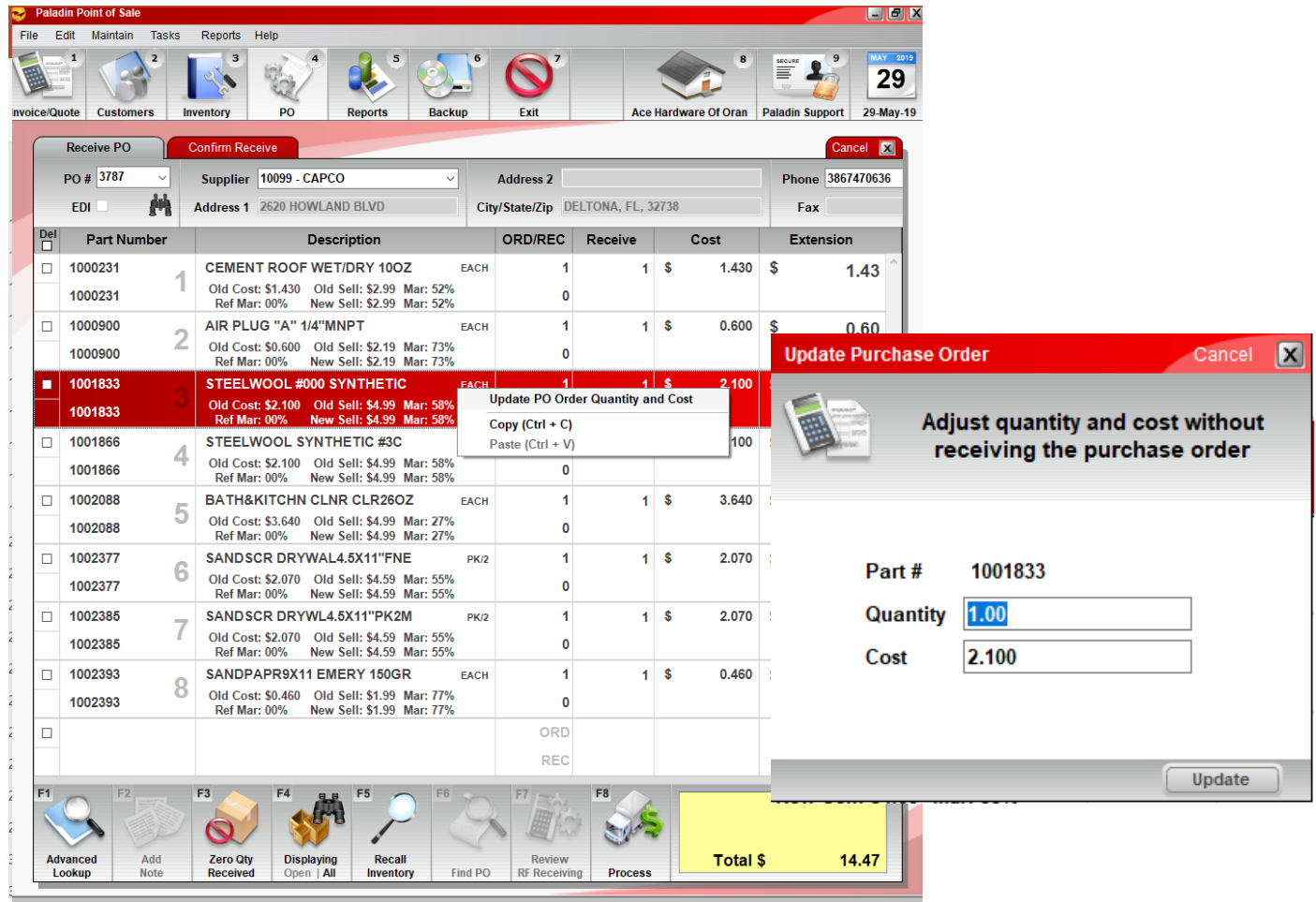
Account Notes

New Note: Add 0/650

Date/Time	Employee	Note
16-Apr-2019 09:42	Paladin Support	Richard came in today and wants a quote of xyz. Need to work on this tomorrow.

Edit the Quantity and Price on a Sent PO

Change and save an order item's quantity and price on a PO that was already sent to your supplier.



The screenshot displays the 'Paladin Point of Sale' software interface. The main window shows a 'Receive PO' form for PO # 3787, Supplier 10099 - CAPCO, and Address 1 2620 HOWLAND BLVD. The form includes a table of order items with columns for Del, Part Number, Description, ORD/REC, Receive, Cost, and Extension. The table lists several items, including CEMENT ROOF WET/DRY 100Z, AIR PLUG "A" 1/4"MNPT, STEELWOOL #000 SYNTHETIC, and SANDSCR DRYWAL4.5X11"FNE. A context menu is open over the 'STEELWOOL #000 SYNTHETIC' item, showing options like 'Update PO Order Quantity and Cost' and 'Copy (Ctrl + C)'. An 'Update Purchase Order' dialog box is also visible, prompting the user to 'Adjust quantity and cost without receiving the purchase order'. The dialog box shows the Part # 1001833, Quantity 1.00, and Cost 2.100. The 'Update' button is highlighted.

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	1000231	CEMENT ROOF WET/DRY 100Z	EACH	1	1	\$ 1.430
<input type="checkbox"/>	1000231	Old Cost: \$1.430 Old Sell: \$2.99 Mar: 52% Ref Mar: 00% New Sell: \$2.99 Mar: 52%		0		\$ 1.43
<input type="checkbox"/>	1000900	AIR PLUG "A" 1/4"MNPT	EACH	1	1	\$ 0.600
<input type="checkbox"/>	1000900	Old Cost: \$0.600 Old Sell: \$2.19 Mar: 73% Ref Mar: 00% New Sell: \$2.19 Mar: 73%		0		\$ 0.60
<input checked="" type="checkbox"/>	1001833	STEELWOOL #000 SYNTHETIC	EACH	1	1	\$ 2.100
<input checked="" type="checkbox"/>	1001833	Old Cost: \$2.100 Old Sell: \$4.99 Mar: 58% Ref Mar: 00% New Sell: \$4.99 Mar: 58%				
<input type="checkbox"/>	1001866	STEELWOOL SYNTHETIC #3C				
<input type="checkbox"/>	1001866	Old Cost: \$2.100 Old Sell: \$4.99 Mar: 58% Ref Mar: 00% New Sell: \$4.99 Mar: 58%		0		
<input type="checkbox"/>	1002088	BATH&KITCHN CLNR CLR26OZ	EACH	1	1	\$ 3.640
<input type="checkbox"/>	1002088	Old Cost: \$3.640 Old Sell: \$4.99 Mar: 27% Ref Mar: 00% New Sell: \$4.99 Mar: 27%		0		
<input type="checkbox"/>	1002377	SANDSCR DRYWAL4.5X11"FNE	PK/2	1	1	\$ 2.070
<input type="checkbox"/>	1002377	Old Cost: \$2.070 Old Sell: \$4.59 Mar: 55% Ref Mar: 00% New Sell: \$4.59 Mar: 55%		0		
<input type="checkbox"/>	1002385	SANDSCR DRYWAL4.5X11"PK2M	PK/2	1	1	\$ 2.070
<input type="checkbox"/>	1002385	Old Cost: \$2.070 Old Sell: \$4.59 Mar: 55% Ref Mar: 00% New Sell: \$4.59 Mar: 55%		0		
<input type="checkbox"/>	1002393	SANDPAPR9X11 EMERY 150GR	EACH	1	1	\$ 0.460
<input type="checkbox"/>	1002393	Old Cost: \$0.460 Old Sell: \$1.99 Mar: 77% Ref Mar: 00% New Sell: \$1.99 Mar: 77%		0		
<input type="checkbox"/>			ORD			
<input type="checkbox"/>			REC			

Update Purchase Order

Adjust quantity and cost without receiving the purchase order

Part # 1001833

Quantity

Cost

Update

Total \$ 14.47

Statement Emails Include Charges Itemized by Project

- When emailing statements, projects and jobs will be itemized and subtotaled in an attached Excel file.



Comparative Revenue Reports for Department Groups



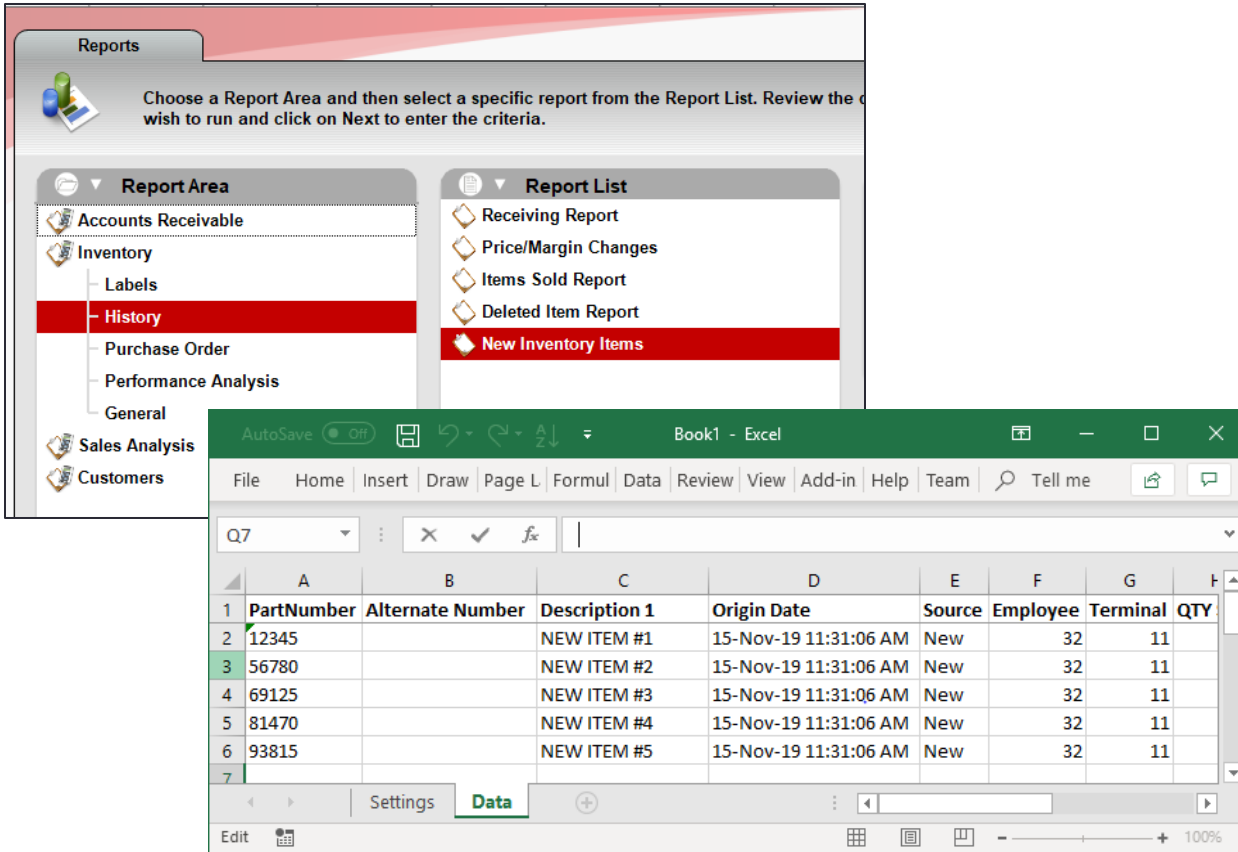
- Group specific departments when generating the Comparative Revenue report.
- Comparative Revenue report (Excel version) will automatically create individual worksheets for those specified groups.

Auto-print Yard Orders



- Automatically print yard orders for items that have a yard order location.
- If the auto-print option is not selected, the cashier will be prompted to print the yard order.
- Yard orders must be printed at the time of purchase.

New Inventory Items Report



Choose a Report Area and then select a specific report from the Report List. Review the criteria and click on Next to enter the criteria.

Report Area

- Accounts Receivable
- Inventory
- Labels
- History**
- Purchase Order
- Performance Analysis
- General
- Sales Analysis
- Customers

Report List

- Receiving Report
- Price/Margin Changes
- Items Sold Report
- Deleted Item Report
- New Inventory Items**

Excel Spreadsheet Data:

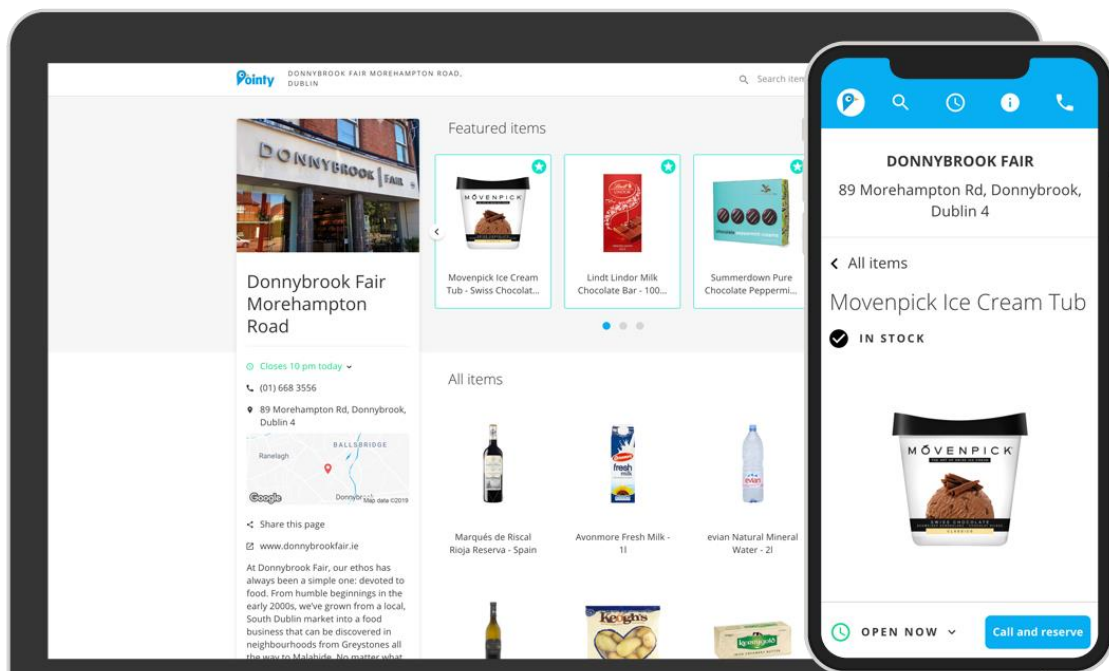
	A	B	C	D	E	F	G	H
	PartNumber	Alternate Number	Description 1	Origin Date	Source	Employee	Terminal	QTY
1								
2	12345		NEW ITEM #1	15-Nov-19 11:31:06 AM	New	32	11	
3	56780		NEW ITEM #2	15-Nov-19 11:31:06 AM	New	32	11	
4	69125		NEW ITEM #3	15-Nov-19 11:31:06 AM	New	32	11	
5	81470		NEW ITEM #4	15-Nov-19 11:31:06 AM	New	32	11	
6	93815		NEW ITEM #5	15-Nov-19 11:31:06 AM	New	32	11	
7								

- Track new items in your inventory with the **New Inventory Items** report in Excel.
- Available in the **Reports** module, **Inventory > History** section.

New Integrations

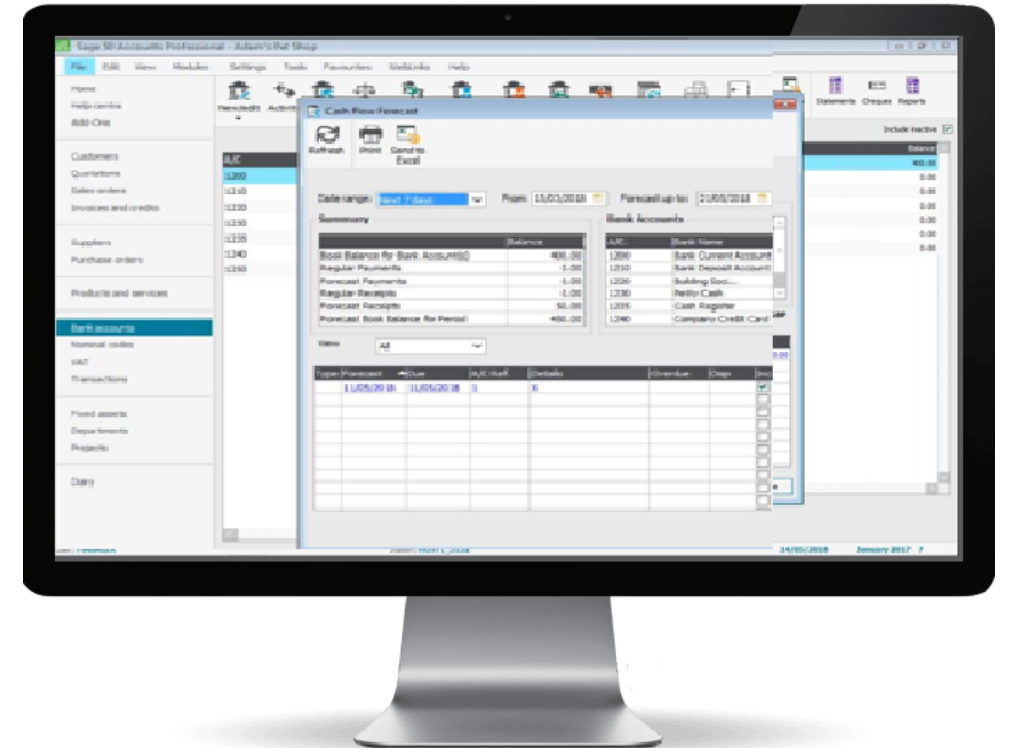
Level the Playing Field with Big-Box Stores

- Pointy puts your products in front of more local shoppers improving your online presence and sales performance.
- Feature your products and pricing within Google searches.
- Positions your store and your products at the top of search results.
- It's an effective way to attract more customers to your store.



Accountants Rejoice! Financial Integration with Sage

- Streamline your accounting practices no matter what size business.
- End of day General Ledger data pushes to Sage.
- Integrates with Sage 50cloud.



Grow Your Business with the Point of Rental Integration



- Rental is a \$63B industry with gross profit between 76%-84%.
- Creates additional retail selling opportunities with add-ons for the project + returning the item.
- Manage your rental department with Point of Rental integration to Paladin.
- Easily set up, manage and track rental contracts, maintenance and inventory.



Check out our Winter 2019/2020 Release Guide on the Help Portal.

Expand your Paladin Knowledge:

Stay relevant in retail:
paladinpointofsale.com/retailsience

Self help at:
portal.paladinpos.com

Webinars available at:
portal.paladinpos.com/webinars

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