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

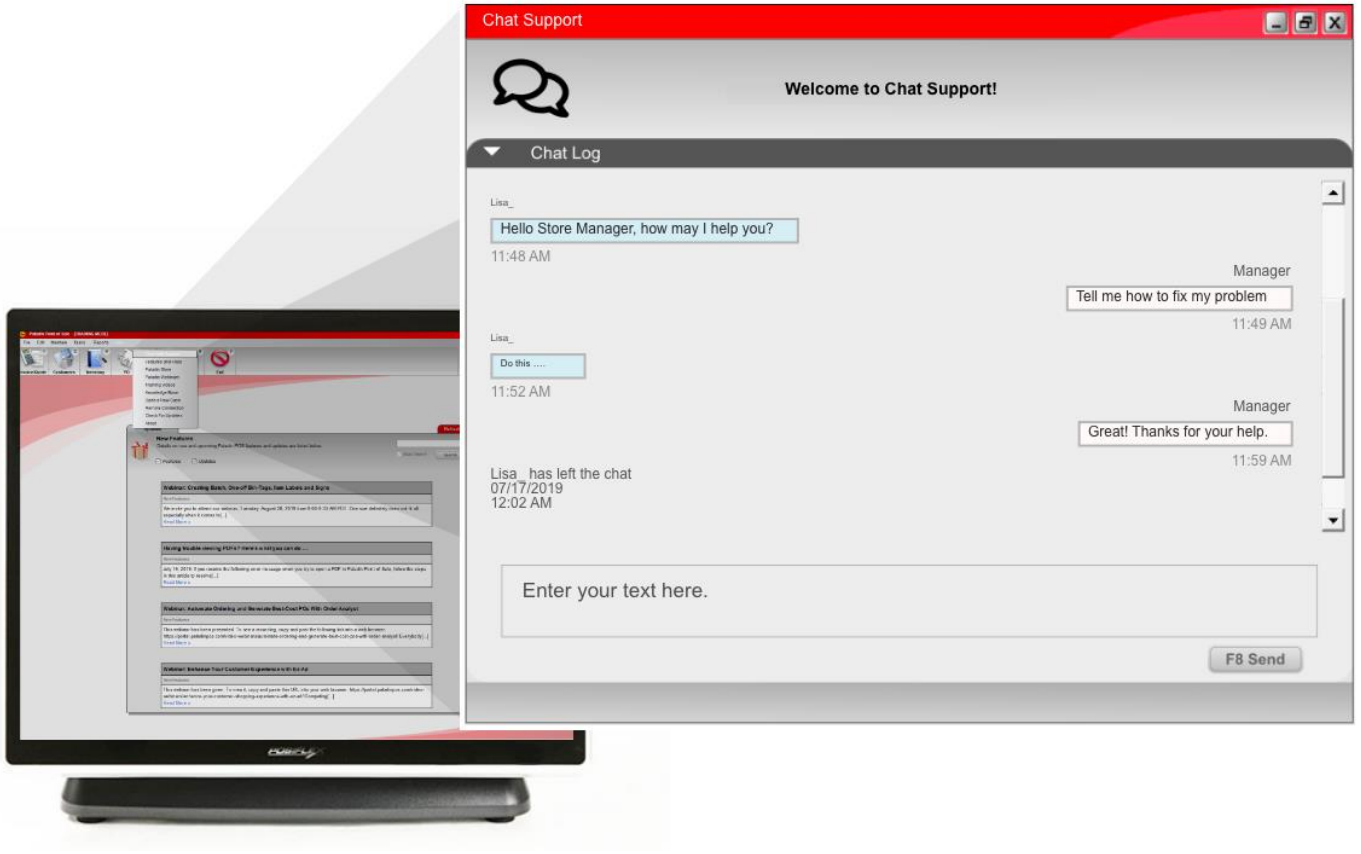
- Pointy
- Sage Accounting
- Point of Rental

Winter 2019/2020 Release

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

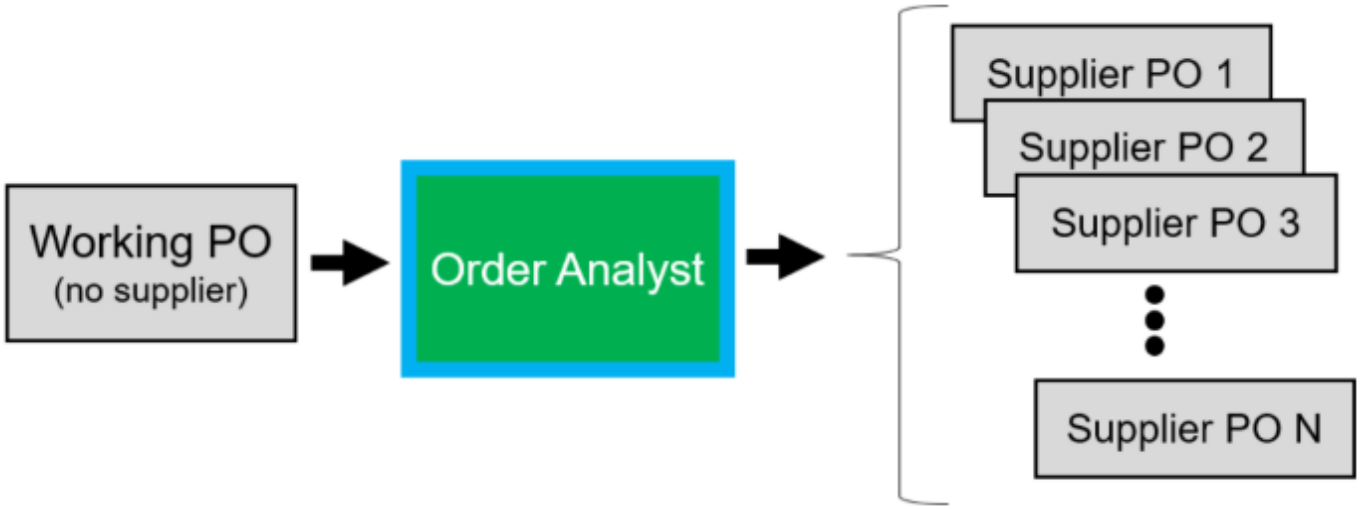
Cardinal Detecto
APS30 digital scale

Magellan 9800i
Scanner Scale

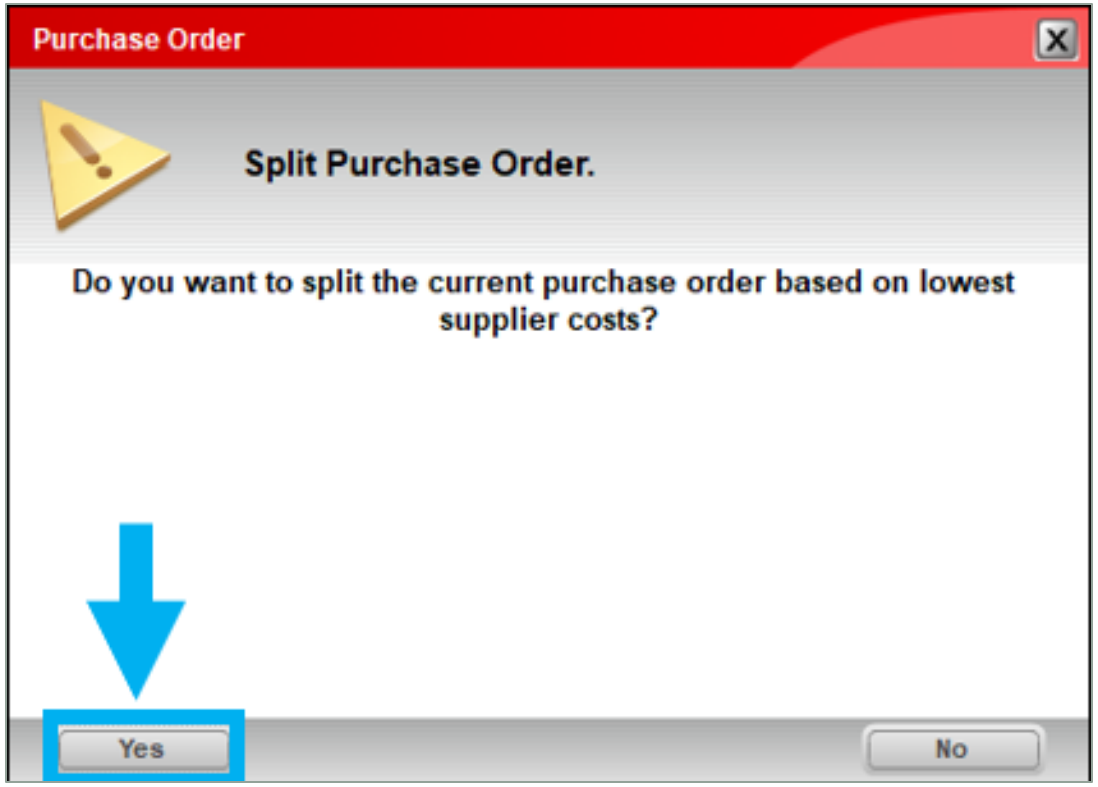
- Price bulk items like nuts, bolts, flour, fruit, seed and feed by weight at checkout with new scale and scanner-scale options.
- Fully-integrated with Paladin, these high-performance digital devices make selling items by weight easy and precise.

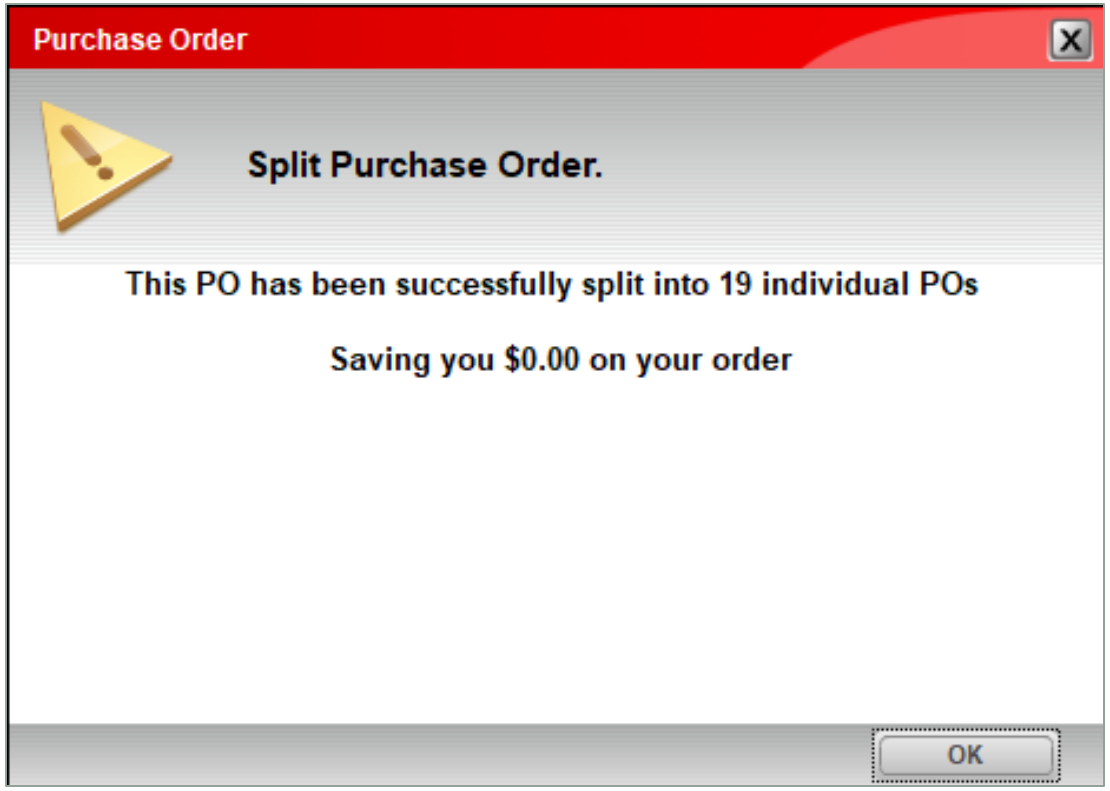
Purchase Orders: Order Analyst Part 1 (Split PO)

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



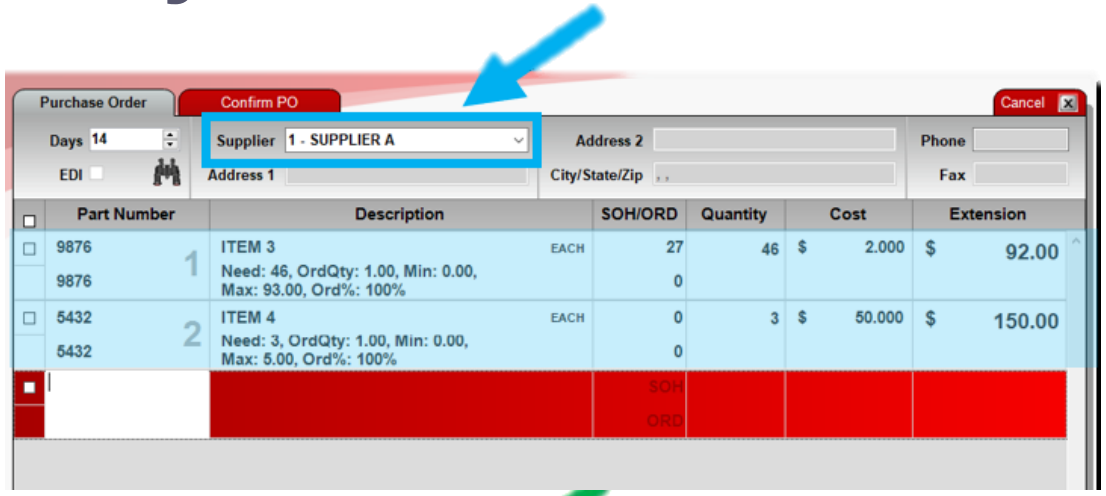
Purchase Orders: Order Analyst Part 1 (Split PO)

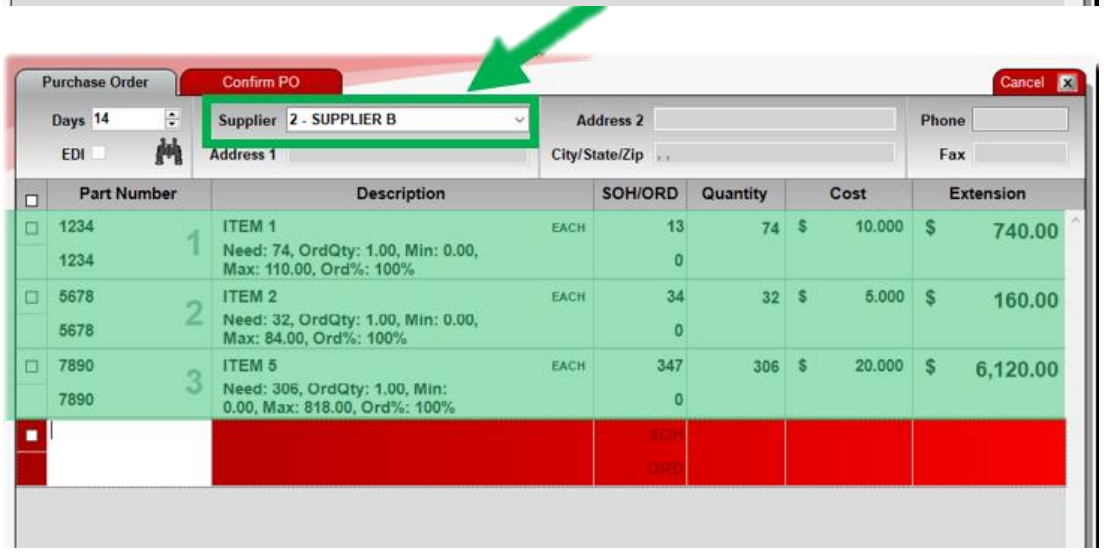




Purchase Orders: Order Analyst Part 1 (Split PO)

Order Analyst

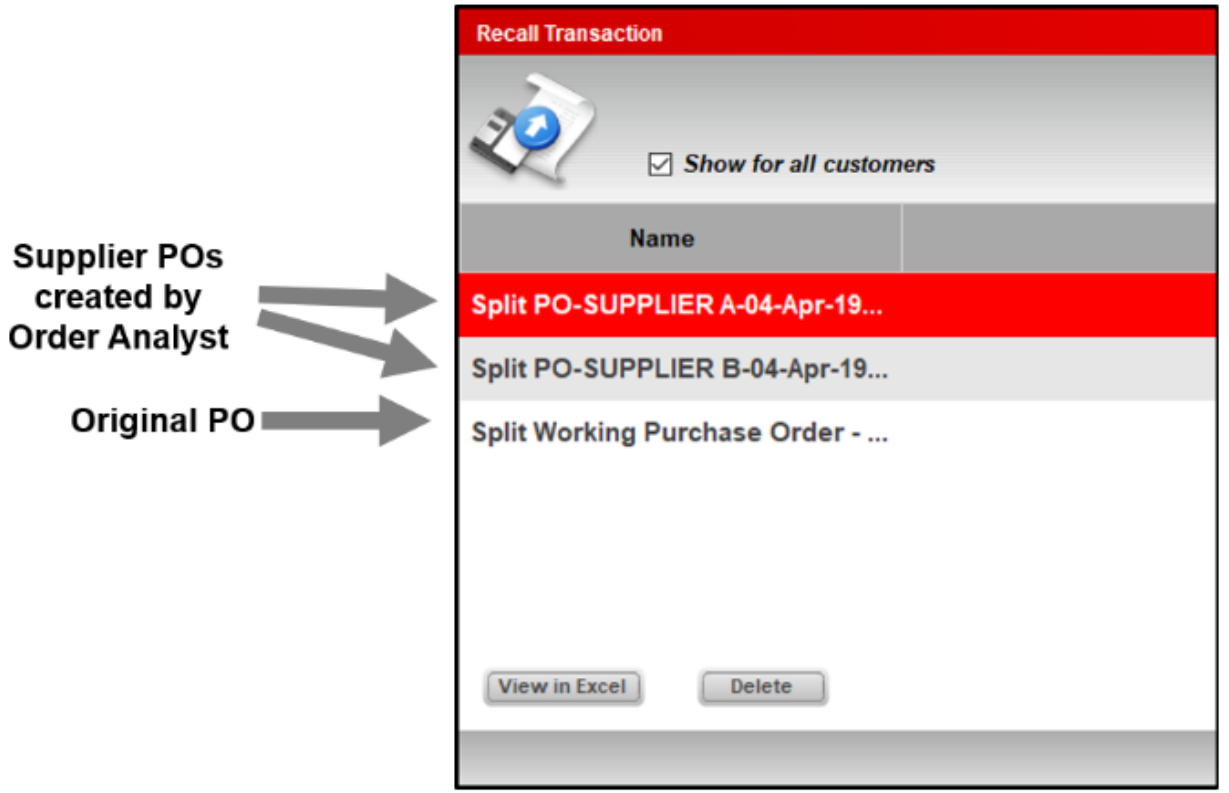




Items are split based on their Primary Supplier, **Supplier 1**.

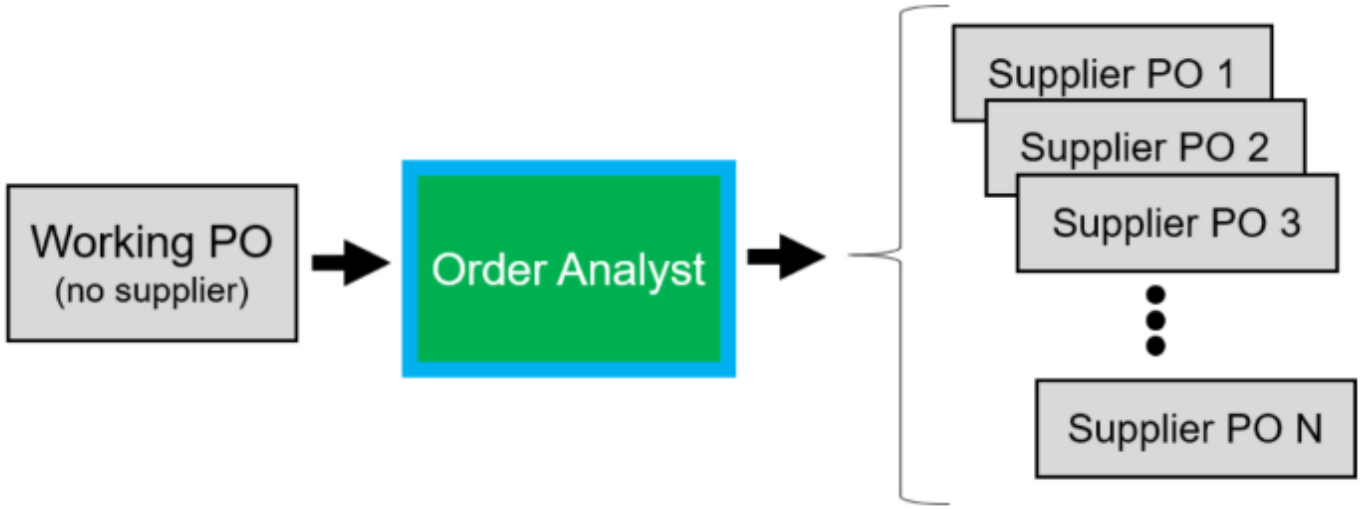
Purchase Orders: Order Analyst Part 1 (Split PO)

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



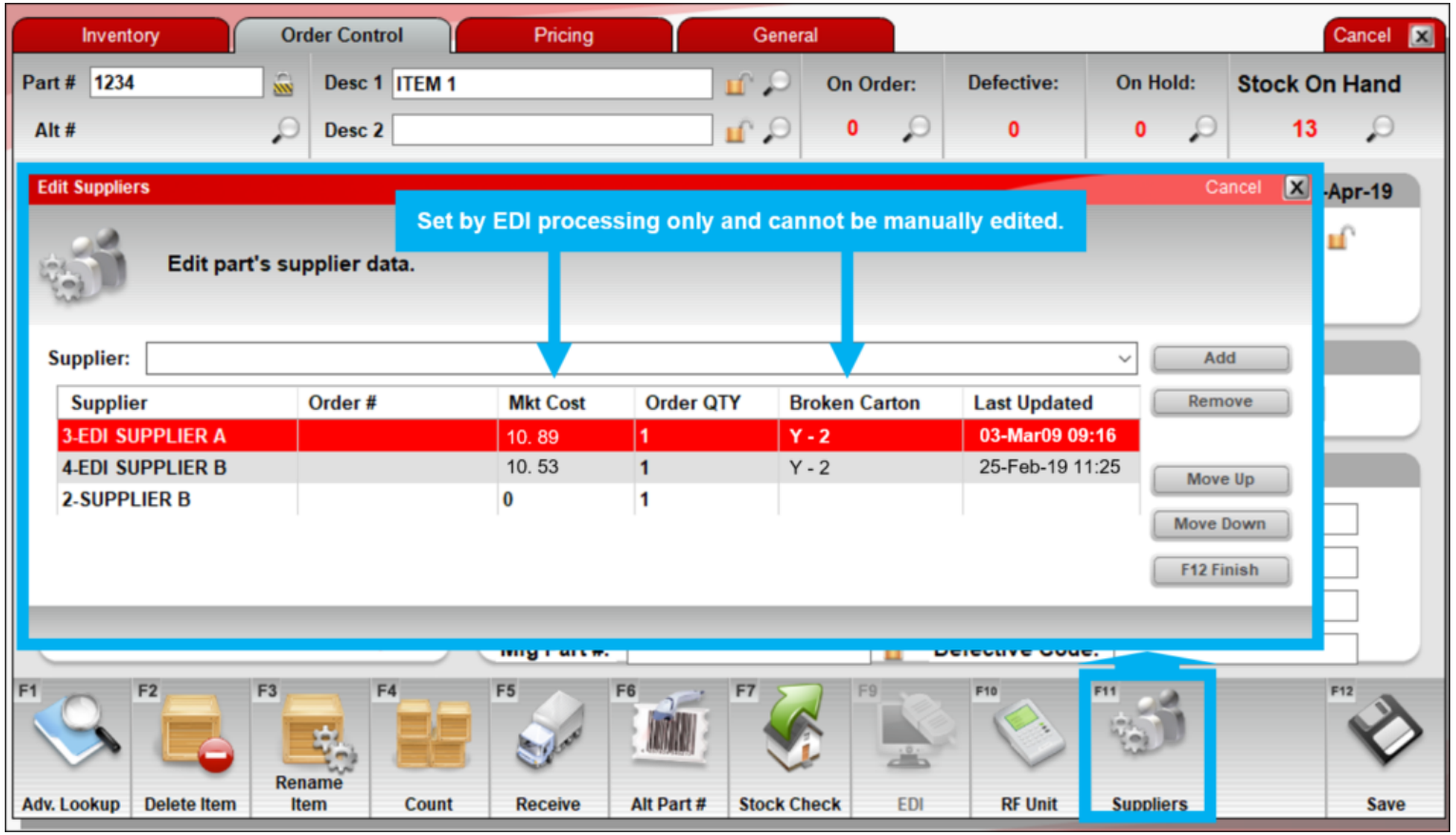
Purchase Orders: Order Analyst Part 2 (Best cost)

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)



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

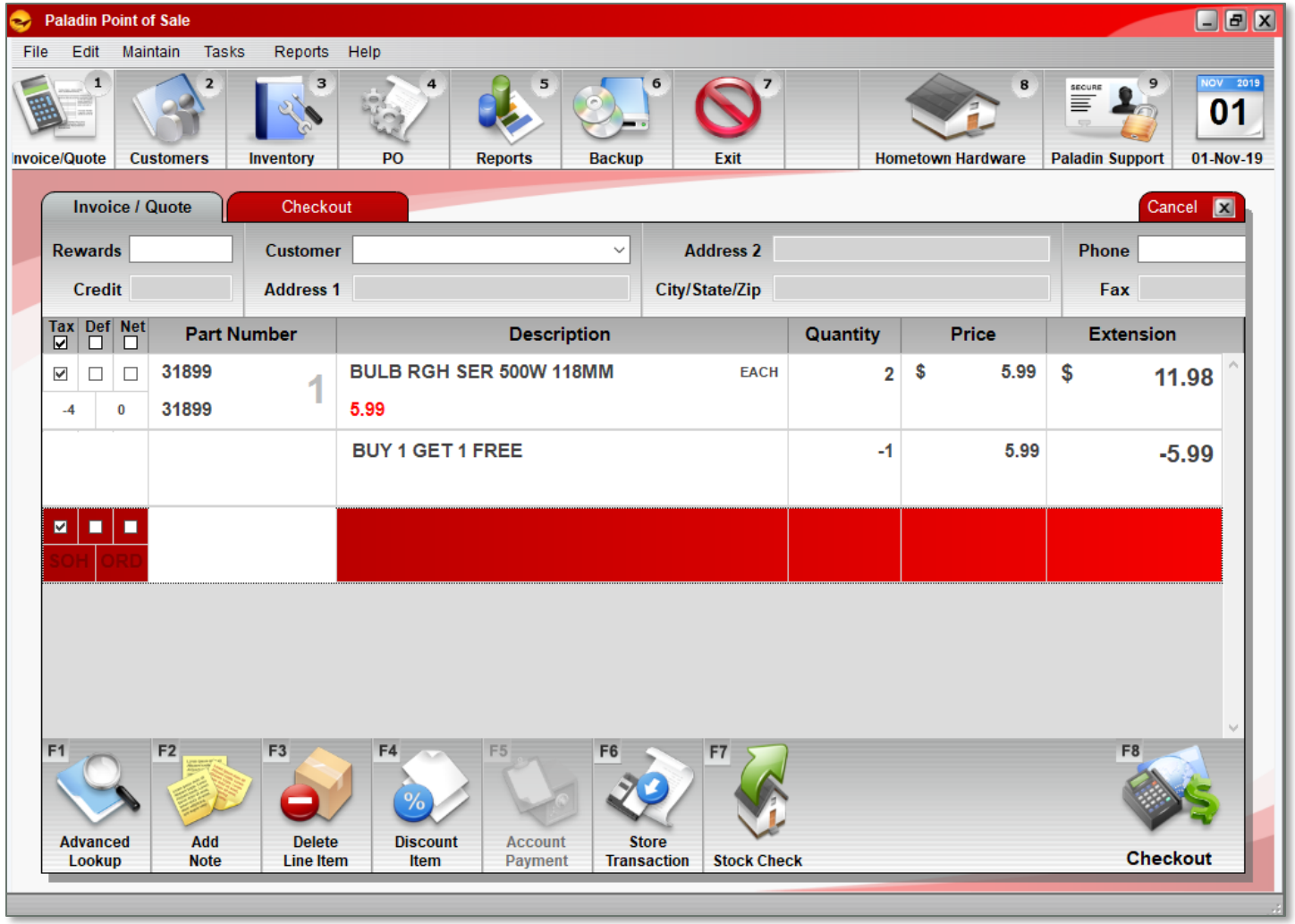
IMPORTANT:

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 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.

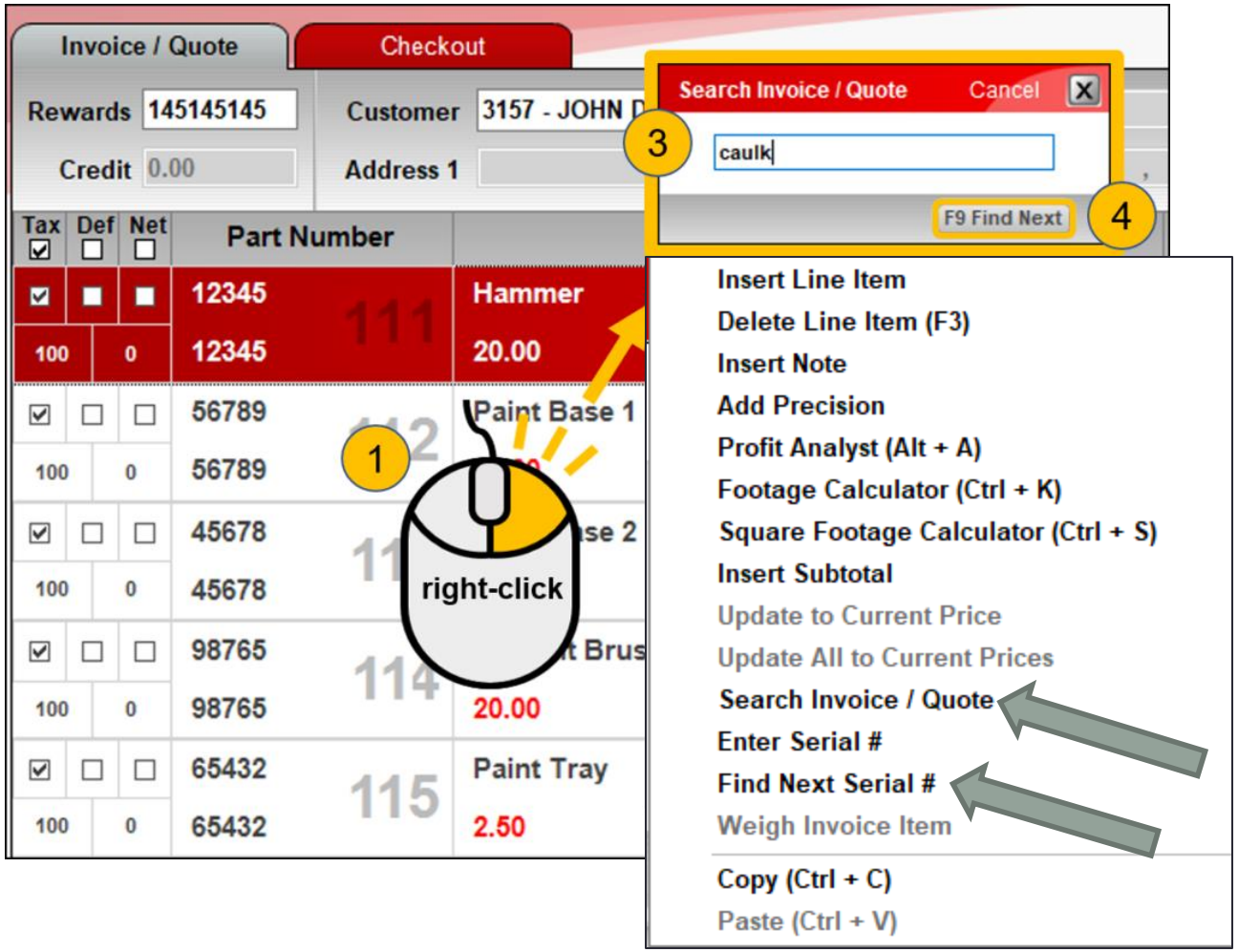
BOGO Screen Shot



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.

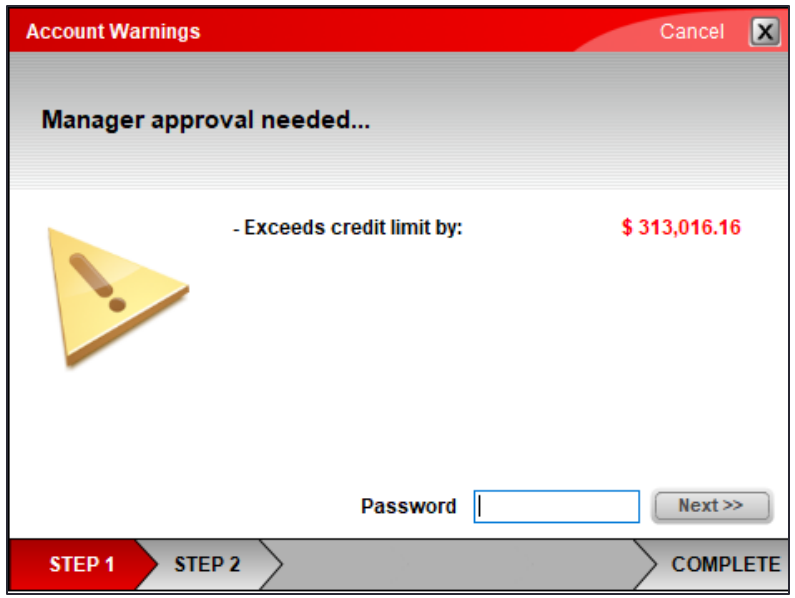
Invoice & Quote: Right-click search feature

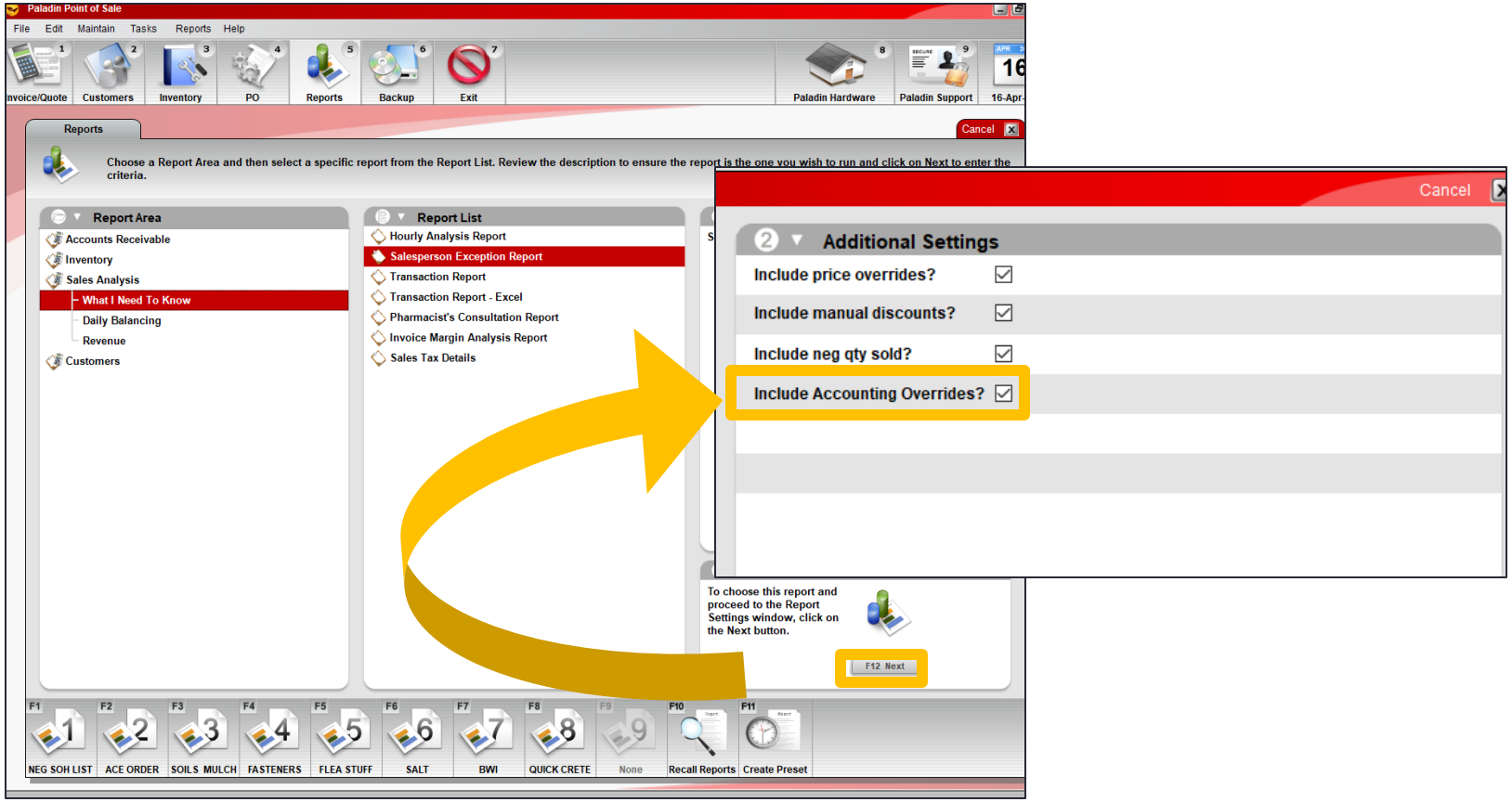


- Quickly search for a part number or description with this new quick access (right-click) menu feature.
- Manage serial numbers.

Monitor Credit Limit Overrides

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





Monitor Credit Limit Overrides

Paladin Hardware

Salesperson Exception Report

Page: 1

Selection	Beginning	Ending
Search Between	16-Apr-19	17-Apr-19
Sales Person #	All	All

Options	
Include Price Overrides	Yes
Include Manual Discounts	Yes
Include Neg Qty Sold	Yes
Include Accounting Overrides	Yes

Sortation	
Sort By:	None
Order By:	None
Sort By:	None
Order By:	None
Sort By:	None
Order By:	None

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

Accounting Overrides, Employee: 1

RICHARD SMITH Acct#: 1 Inv: 729912 Term: 1 Sales Person: 1 Disc Allowed: 0.00 16-Apr-19 16:15

T A X	D E F	N E T	Scan Number	Description	Part #	Dept	Cost	Qty	Price One	Sell Price	Per Qty	Ext	Margin	S E L	D I S C
X			17794	FINISH FLOOR 5 OAL ACE	17794	10	1712.10	30	99.99	94.99 /	1	2849.70	39.92%		
				Mgr 1 change due approval for $310,332.33		0	0.00								
				Manager approval for accounting override: 1		0	0.00								

Account Number: 1 Name: Richard 1,712.10 CHANGE 313,467.00 SUB TOTAL 2849.70 39.92%

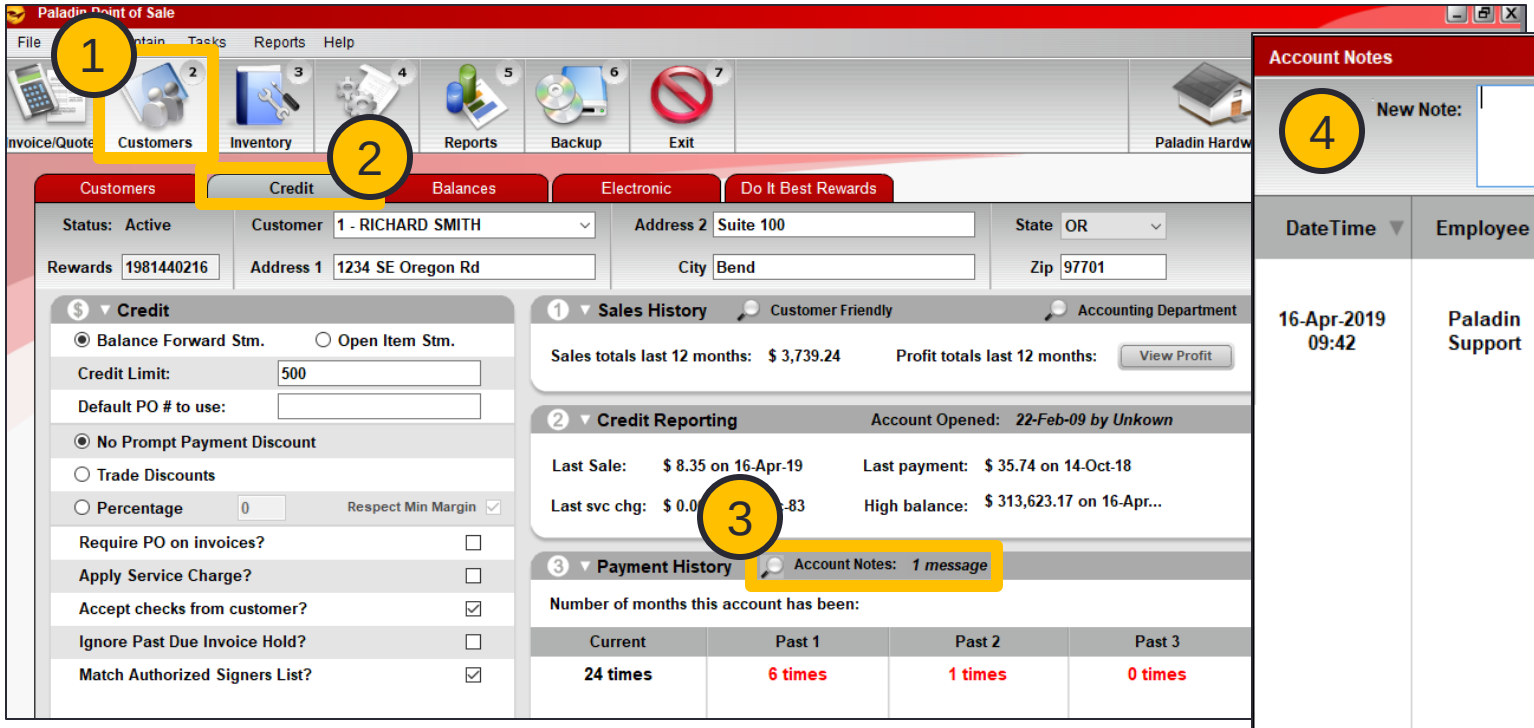
Memo: CHANGE - 310,332.33 TOTAL TAX 284.97

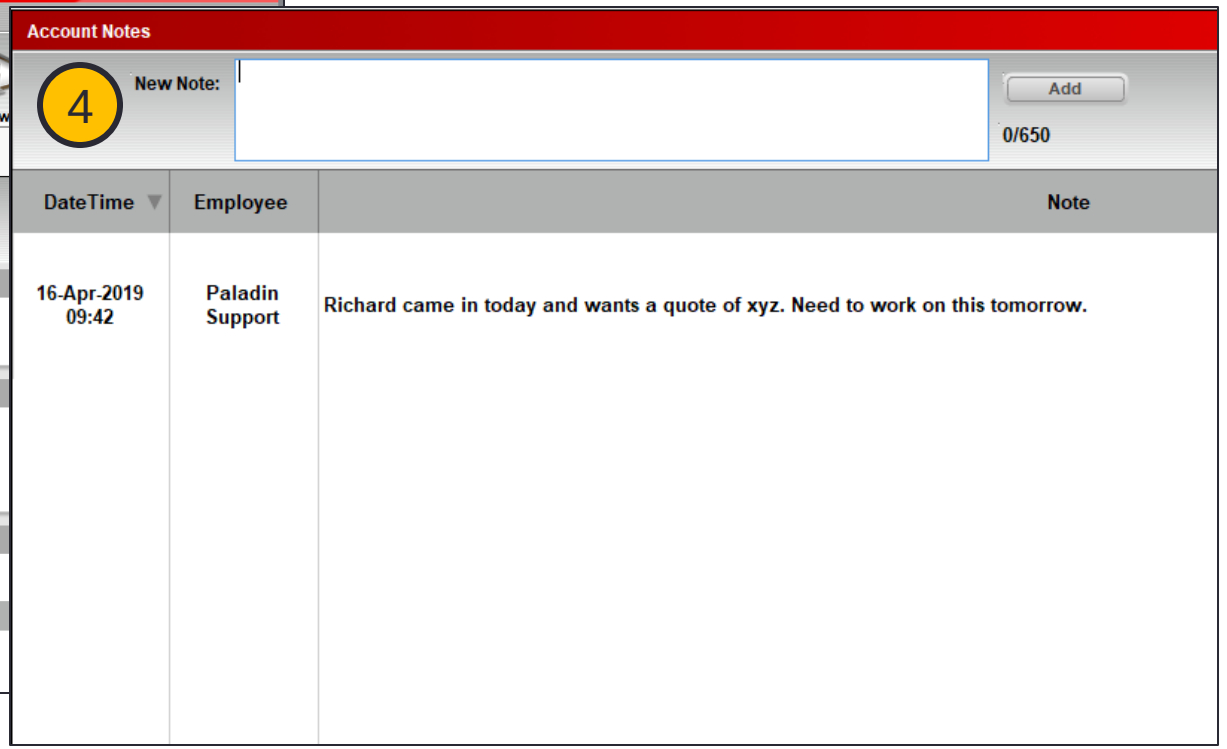
Manual Signature GRAND TOTAL 3134.67

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.





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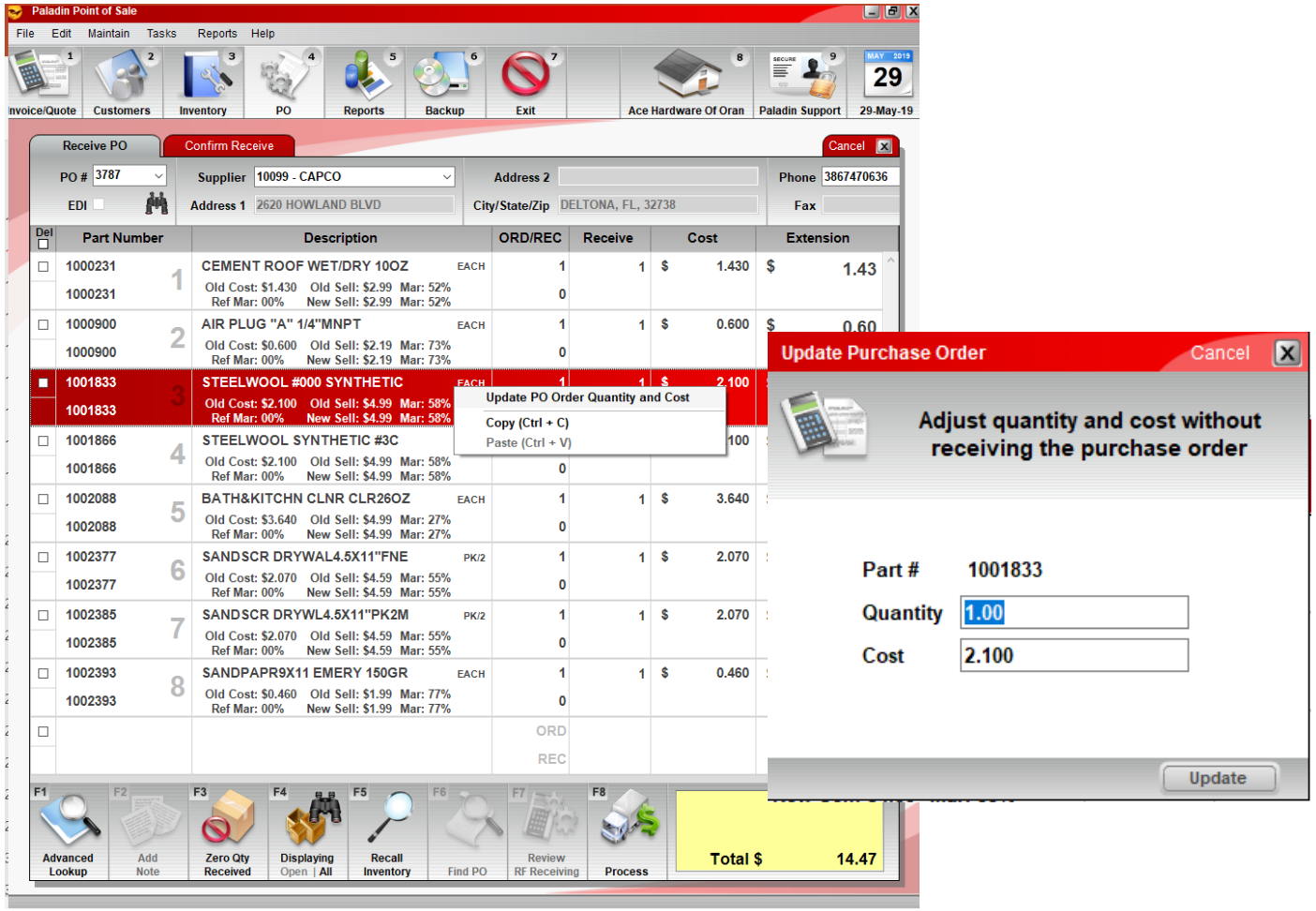
Edit the Quantity and Price on a Sent PO

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



Statement Emails Include Charges Itemized by Project

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

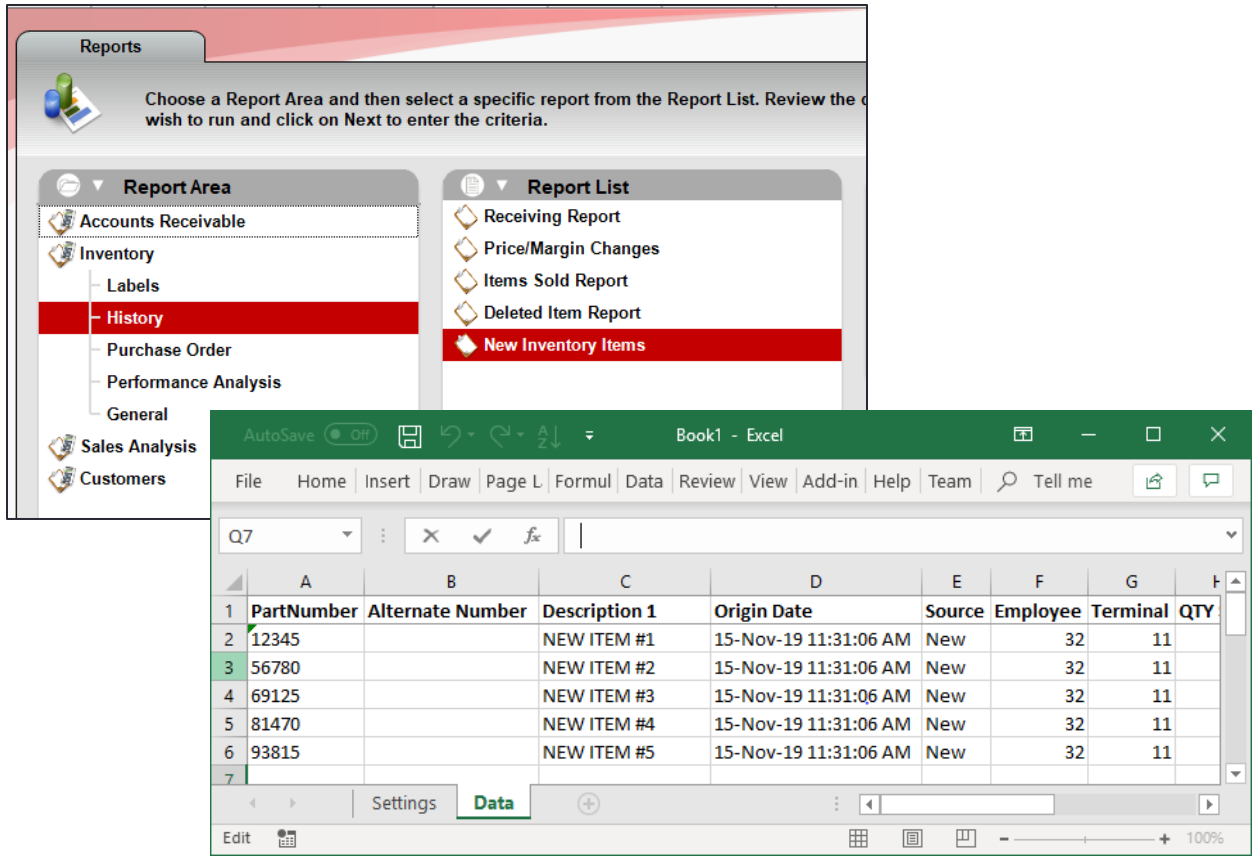
Comparative Revenue Reports for Department Groups

- 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.

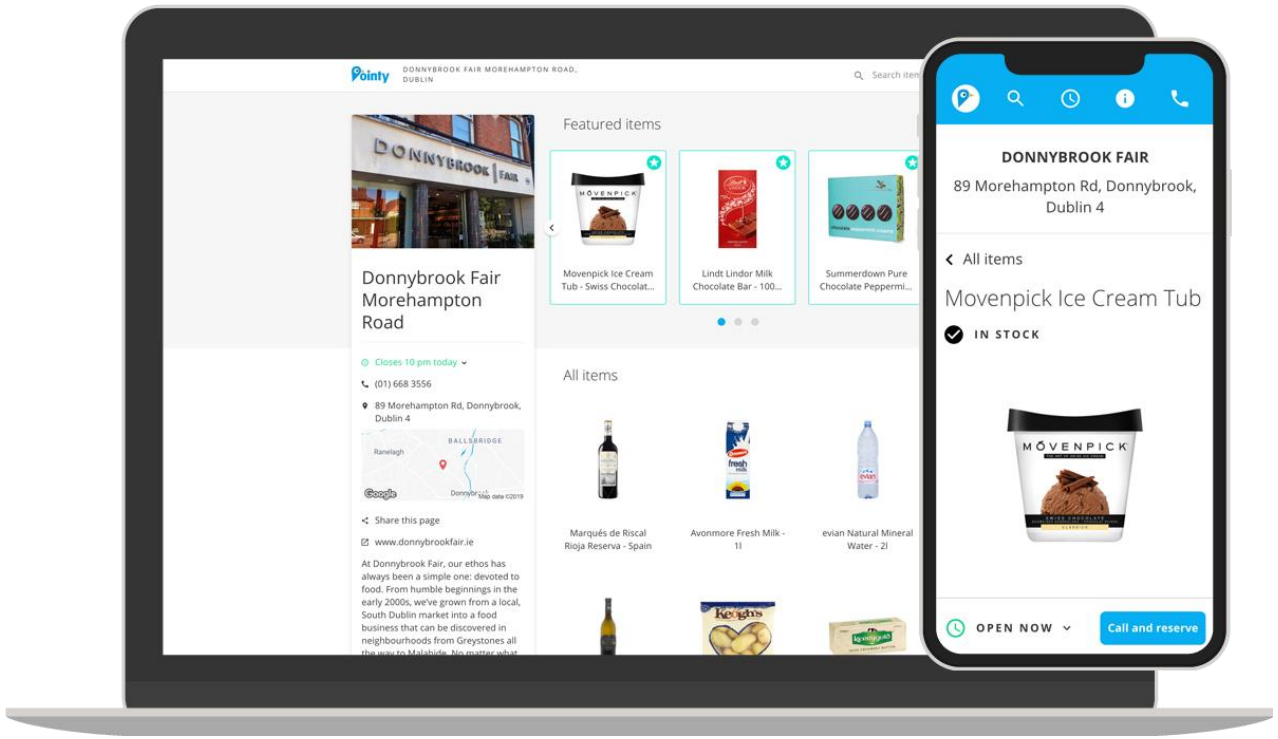
New Inventory Items Report



- 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

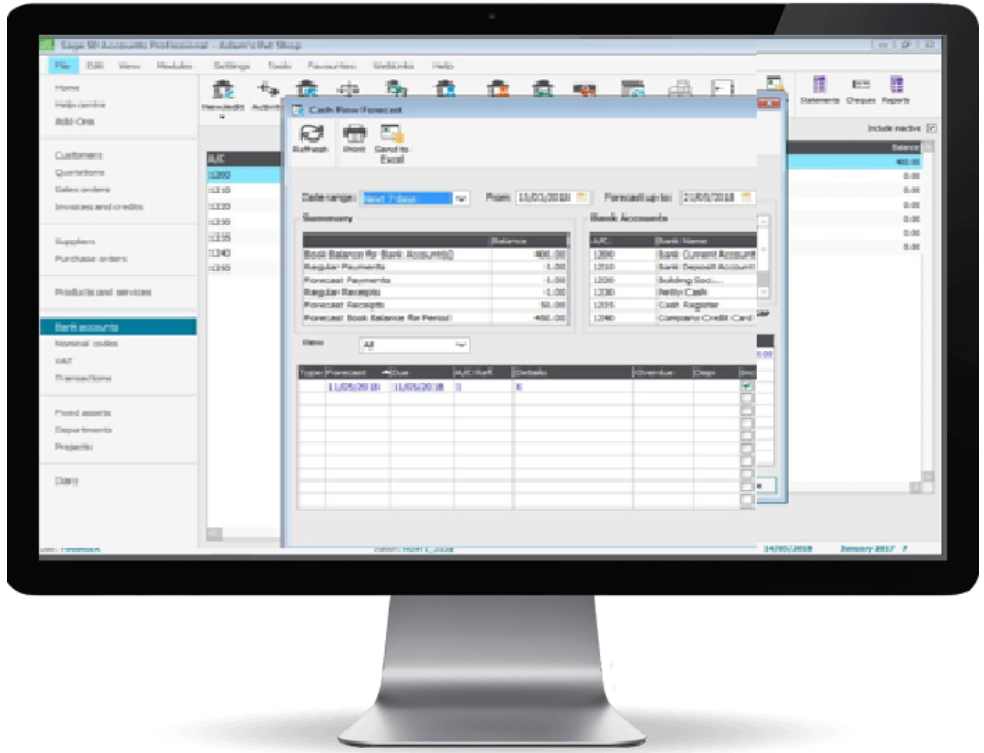


- Pointy puts your products in front of more local shoppers improving your online presence and sales performance.
- Feature your products and pricing within Google searches.
- Positions your store and your products at the top of search results.
- It's an effective way to attract more customers to your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

Pointy
Find it locally

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.

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

Expand your Paladin Knowledge:

Stay relevant in retail:
paladinpointofsale.com/retailscience

Webinars available at:
portal.paladinpos.com/webinars

Self help at:
portal.paladinpos.com

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