

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



Class Act: Requiring Information by Class

Chad Klein



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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BizCoach Webinars



Class Act: Requiring Information by Class

Agenda

- 1.
- 2.
- 3.



- What does it mean to require information by class?
- Why would a store use this feature?
- How to setup a restricted class
- How to add an item to the restricted class
- How to enter required customer information at checkout
- Demonstration



Class Act: Requiring Information by Class

What & Why



What does it mean to require information by class?

- You can designate a special class for items that require additional customer information before the sale is completed. When these items are purchased, you must enter this information at checkout using one of these methods:
 - Manually enter the required customer information.
 - or-
 - Automatically enter the required information by scanning a state-issued ID with a 2D barcode scanner.
Note: You must have a 2D scanner to use this option.

Why would a store use this feature?

- Some states require stores to collect customer information when they sell items such as spray paint, fire arms, and alcoholic beverages.



Class Act: Requiring Information by Class

How to setup a restricted class

Paladin Configuration

Min Margin | Pharmacy | Pricing Plan | Receivables | Remote Access | Rewards | Rounding
Invoice (Local) | Network | Secure | Accounting | ACH | Class | Credit Card | Company

Classes

Active Deleted

ID	Name
922	GARDEN FERTILIZER
923	OPEN
924	OPEN
935	CHARCOAL,SMOKING CHI...
936	JUGS AND COOLERS
937	RESIN LAWN FURNITURE
938	OUTDOOR STORAGE
999	RESTRICTED ITEM

Name: ←

Class ID:

1. On the **File** menu, click **Setup**.
2. Click the **Class** tab.
3. Choose or create a class that will be the restricted class.
 - **To choose an existing class:**
Choose a class from the **Classes** list, and make a note of the class **ID** to use in a future step.
 - **To create a new class:**
In the **Name** box, enter a name for the new restricted class. In the **Class ID** box, enter a unique class ID, and then click **Save**. Make a note of the class **ID** to use in a future step.

Note: You can only specify one restricted class that can apply to any item.



Class Act: Requiring Information by Class

How to setup a restricted class (continued)

The screenshot shows the 'Paladin Configuration' window with the 'Company' tab selected. The 'Restricted Class' section is visible at the bottom, with the 'Enabled Restricted Classes' checkbox checked and the 'Restricted Class Number' field containing the value '999'. A green arrow points to the 'Restricted Class Number' field.

4. Click the **Company** tab.
5. Scroll to the **Restricted Class** pane.
6. In the **Restricted Class** pane, select the **Enabled Restricted Classes** checkbox.
7. In the **Restricted Class Number** box, type the restricted class ID from the previous step.
8. Click **Save**, and then click **Close**.



Class Act: Requiring Information by Class

How to add an item to the restricted class

The screenshot shows a software interface with the following fields and values:

- er Control** (tab)
- Pricing** (tab)
- General** (tab)
- Desc 1: PAINT THINNER GALLON
- Desc 2: (empty)
- On Order: 0
- Defective: 0
- Classes** (section 1)
 - Class: PAINT TEXTURE GUNS (dropdown)
 - 999 - RESTRICTED ITEM (dropdown, highlighted with a green arrow)
 - Subclass: 0 - None (dropdown)
 - 0 - None (dropdown)
- Item Information** (section 2)
 - Autotext: (empty)
 - Location: 0 - None (dropdown)
 - Core Charge: (empty)
 - Dept: 1 - Paint and Paint Sun (dropdown)
 - Mfg Number: (empty)
 - U/M: 1 - EACH (dropdown)
 - Defective Code: (empty)
- Cost: \$0.00

1. On the top ribbon, click the **Inventory** module.
2. Search for and open the inventory item.
3. Click the **General** tab or press PgDn three times.
4. In the **Classes** pane, set one of the three class selections to the restricted class.
Important: Many EDI vendors set the first class selection. If this item is updated by EDI, or if you don't know, set the second or third class option instead.
5. Click **Save** or press F12.



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How to enter required customer information at checkout

The screenshot shows the 'Paladin Point of Sale' software interface. The main window is titled 'Invoice / Quote' and 'Checkout'. A dialog box titled 'Additional Customer Info Required' is open, prompting for customer information. The dialog box contains the following fields:

- * ID:
- * ID Type:
- Name:
- Phone #:
- Address:
- State:

At the bottom of the dialog box, there is a 'Next >>' button and a progress indicator showing 'STEP 1' and 'COMPLETE'.

The main window displays a payment summary table:

Payment Type	Amount
AMOUNT DUE	\$ 0.00
Cash	\$ 2.14
CHANGE DUE	\$ 0.00
Subtotal \$	2.00
Tax \$	0.14
Total \$	2.14

The bottom of the interface features a toolbar with function keys F1 through F8, each with a corresponding icon: F1 (Cash), F2 (Charge), F3 (Credit Card), F4 (Check), F5 (Coupon), F6 (Store Transaction), F7 (Print Quote), and F8 (Tax).

1. In the **Invoice/Quote** module, add an item in the restricted class to the invoice along with any other items.
 2. During the checkout process, when you select the payment type (such as **Cash** or **Credit Card**), an **Additional Customer Info Required** window appears.
 3. In the window, enter the required customer information manually or scan the barcode on the back of a state-issued ID using a 2D barcode scanner. **
 4. Click **Next** to complete the sale.
- ** You have a 2D scanner if the red laser appears as an 'X' or cross. 1D scanners only display a single red line.

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