

PALADIN DATA CORPORATION™

BizCoach Webinars

FREE ADVANCED TRAINING



First to know! Mastering the new general release features

Jenny Cooper



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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First to know! Mastering the new general release features

General Release feature highlights

Agenda

- 1.
- 2.
- 3.



- ☐ Get the help you need in the Paladin Help Portal
- ☐ Access the Paladin Store from Paladin Point of Sale
- ☐ Choose how deleted items are handled in the **Invoice/Quote** module
- ☐ Create pending purchase orders with the Purchase Order Importer
- ☐ Download Orgill EDI files in Paladin Point of Sale
- ☐ Add a bag of Rx items to an invoice with one-scan Bag Checkout
- ☐ Classify customers with customer types
- ☐ Organize customer purchases by project



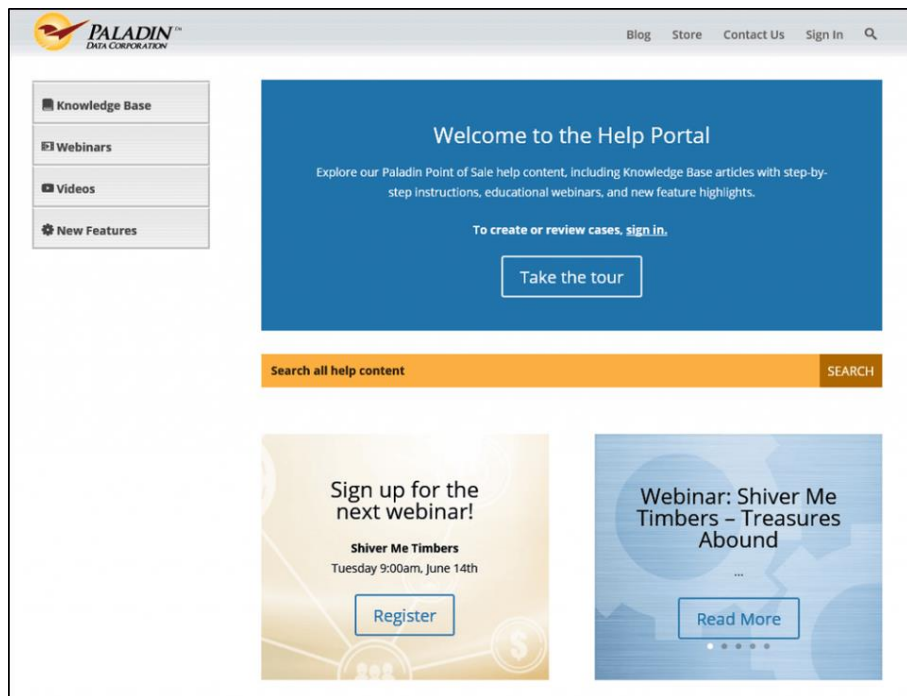
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First to know! Mastering the new general release features

Get the help you need in the Paladin Help Portal



- ☐ All your help resources in one website.
 - ☐ Get step-by-step instructions in the Knowledge Base.
 - ☐ Watch our webinar series.
 - ☐ Watch training videos.
 - ☐ Sign in to create and monitor cases or to give remote access to a tech.
- ☐ Access the portal from the **Help** menu in Paladin Point of Sale or from your browser (<http://portal.paladinpos.com>).
- ☐ Demo



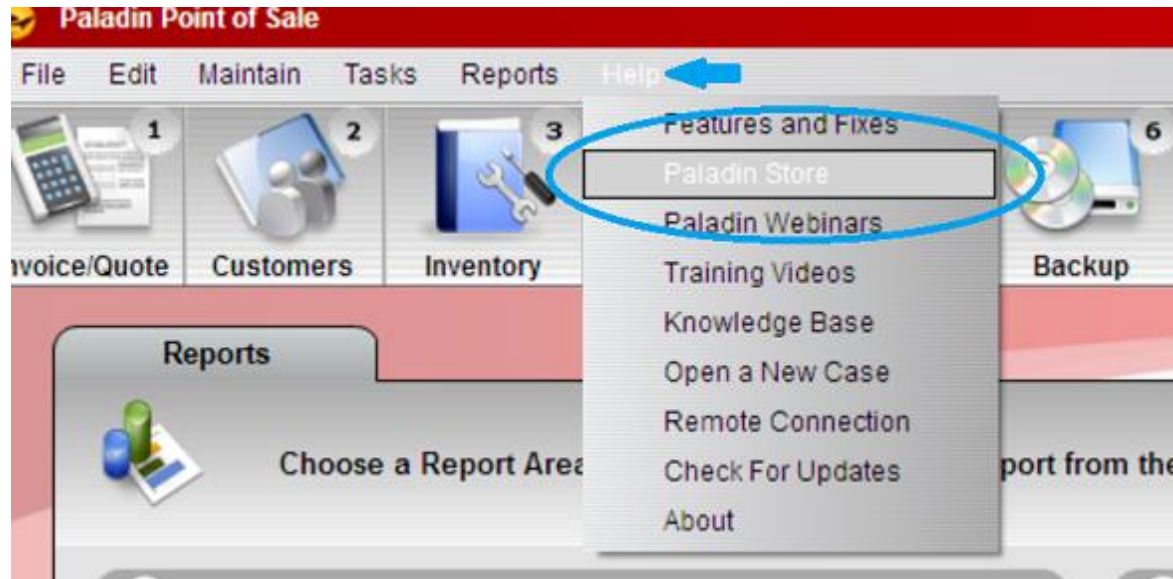
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First to know! Mastering the new general release features

Access the Paladin Store from Paladin Point of Sale

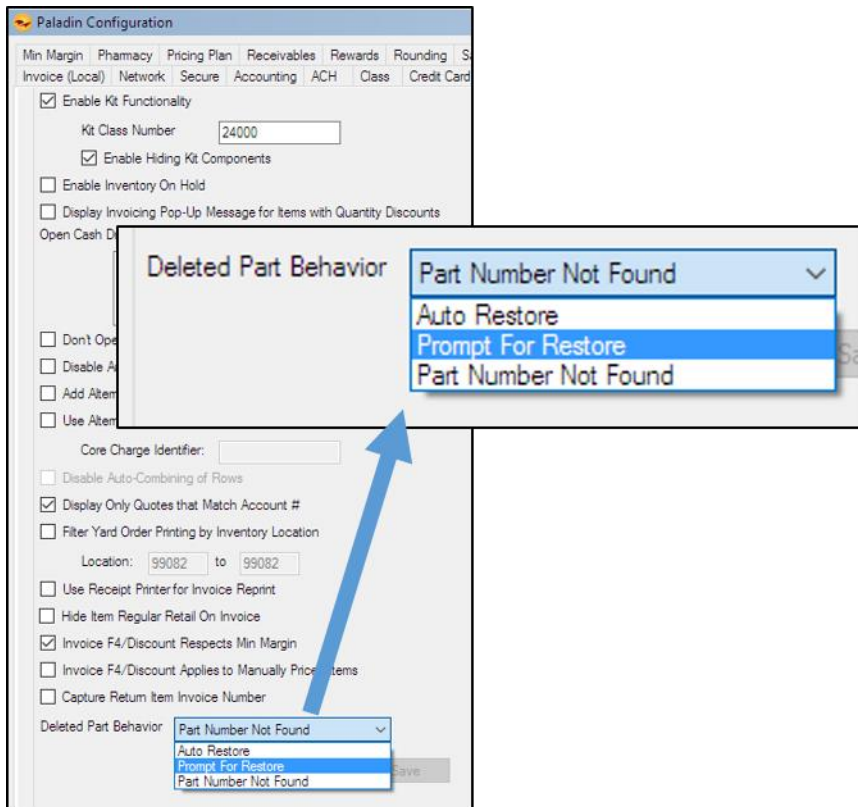


- ☐ Order your store supplies quickly and easily from the **Help** menu in Paladin Point of Sale.
- ☐ Make low-risk purchases with no credit card numbers – we just charge your card on file.
- ☐ Demo



First to know! Mastering the new general release features

Choose how deleted items are handled in the Invoice/Quote module



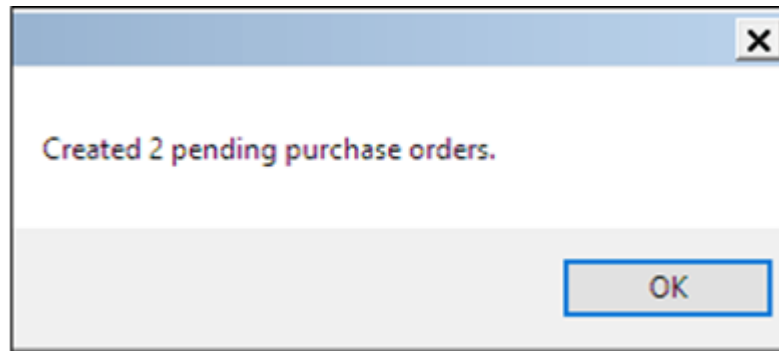
- ☐ A Paladin Configuration setting lets you select how to handle inactive (deleted) items that are scanned or manually entered in the **Invoice/Quote** module.
- ☐ There are three options:
 1. **Auto Restore:** Automatically restore items to active status.
 2. **Prompt for Restore:** Ask whether to restore the inactive item to active status.
 3. **Part Number Not Found:** Display a 'Part Number Not Found' message.
- ☐ Demo



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Create pending purchase orders with the Purchase Order Importer

	A	B	C	D
1	PART #	SUPPLIER #	QUANTITY	COST
2	PART10	10	25	3.49
3	PART20	10	5	9.79
4	PART30	21	20	20.99



- ❑ Imports a list of items, and automatically creates pending purchase orders (one for each supplier) for the items in your active inventory.
- ❑ Automates the time-consuming task of manually updating your inventory with items that you received outside of the normal purchasing process.
Example: Receiving items from a show purchase or manufacturer's special promotion.
- ❑ Identifies items that you carry in a large list, and creates pending purchase orders.
Example: Create pending purchase orders from a supplier's sale item list.



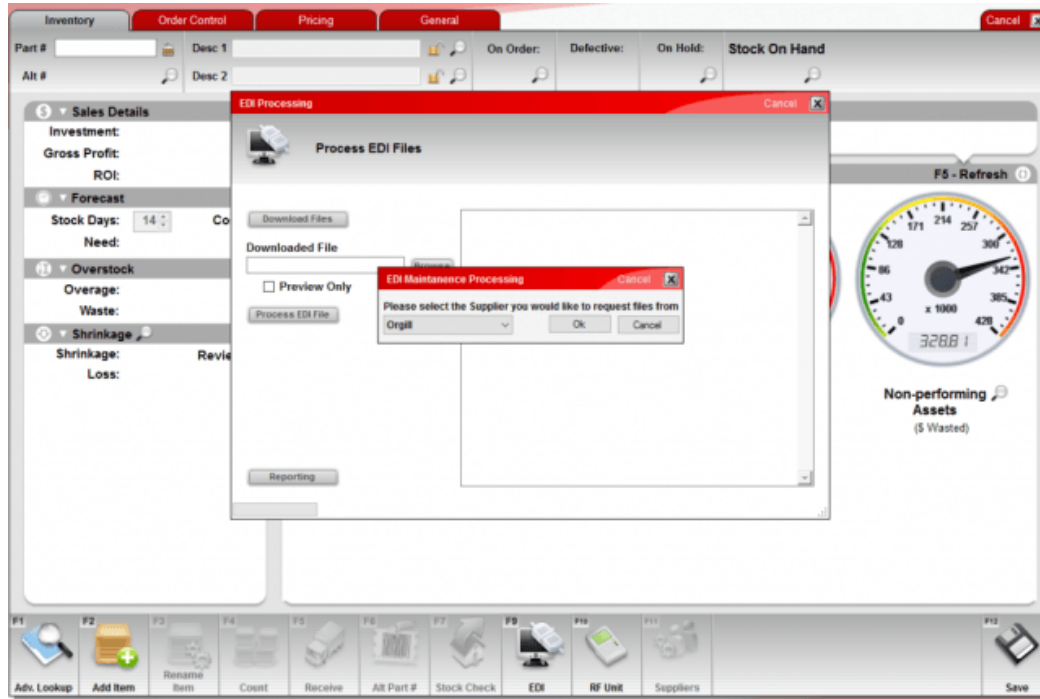
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Download Orgill EDI files in Paladin Point of Sale



- ❑ Download **and** process Orgill EDI files in the **EDI processing** window in the EDI Processing window in Paladin Point of Sale.
- ❑ A separate program on your computer desktop is no longer needed.
- ❑ Demo



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First to know! Mastering the new general release features

Add a bag of Rx items to an invoice with one-scan Bag Checkout



- ☐ Scan a single bag barcode and add all the prescriptions it contains to the customer's invoice at checkout.
- ☐ The Bag Checkout feature is available for pharmacy systems that support it.



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First to know! Mastering the new general release features

Classify customers with customer types

The screenshot shows the 'Customers' tab in the Paladin Point of Sale software. The 'Customer Type' dropdown menu is open, displaying a list of predefined customer types. A blue arrow points to the 'Contractor' option. The list includes: Contractor, Employee, Farm/Agriculture, Healthcare, Homeowner/DIY, Manufacturer, Municipality/Government, Non-profit Organization, Other Business, Property Management, Religious Organization, Restaurant, Retail Business, School/Education, Service Industry, and Store Use. The background shows the customer record for '3183 - JOHN SMITH' with fields for Address, City, State, and Zip.

- ❑ Categorize your customer accounts by selecting a customer type from a list of pre-defined list in Paladin Point of Sale. Or, create your own customer types.
- ❑ Example customer types:
 - ❑ Contractor
 - ❑ Employee
 - ❑ Homeowner
 - ❑ Demo



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Organize customer purchases by project

Paladim Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 P.O. 5 Reports 6 Backup 7 Exit 8 Store Manager 9 06-Jun-16

Customers Credit Balances Electronic

Status: Active Customer: 3178 - TEST CUSTOMER Address 2: State: OR

Rewards: Address 1: 123 Test Street City: Beav Zip: 97702

Authorized Signers & Projects

Use this section to add or remove authorized signers or projects.

☐ Authorized Signers ☒ Projects

Enter New Project:

Elm St Middle School
Red Barn
Smith Remodel

☒ Active ☐ Inactive

Add Remove Edit F12 Finish

Form Control

E-mail invoice copies? ☐
E-mail statement copies? ☐
Create month-end statement? ☒
Force invoice to big form? ☐
Force sales rpt to 1 invoice per page? ☐

Checkout Screen Note

Click to edit Note:

Advanced Lookup Delete Customer Rename Customer Projects & Auth. Signers Payment Management Adjust Pricing Plans Tax View Past Statements Save

- ☐ Create and assign customer projects at checkout.
- ☐ Later, use these projects to filter customer transactions in the **Recent Sales History** viewer or the **Transaction Report**.
- ☐ Demo

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