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Charles Owen



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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- Goals of this presentation
- What messages can do for your store
- Message types
- How to set up the product level message
- How to set up the receipt message
- How to set up the signature message by class
- How to set up the tax exemption message
- Learn more



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Goals

- Learn when to apply messages
- Learn where to apply messages
- Learn how to apply messages
- Learn why to apply messages—most important



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What messages can do for your store



- Upsell products and services.
- Broadcast upcoming events for store or community.
- Show support for local charities.
- Promote an in-store loyalty program.
- Send customers to a webstore or social media sites.
- Provide information that helps protect your company from liability issues including:
 - Legal/compliancy notices (optional: signature required)
 - Manufacturer warranty messages
 - Product warnings and notices



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Message types



- Product level messages
- Receipt messages
 - Logo
 - Header (advance by-line)
 - Trailer by-line
 - Footer
 - Invoice title or description
- Signature messages by class (on screen or receipt)
- Tax exemption messages



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How to set up the product level message

- In the **Inventory** module, display an item. 1.
- 2. Click the **General** tab
- 3. In the **Item Information** pane, in the **Autotext** box, enter a message.
- Click Save. 4.

The message will appear below the item on both the invoice and the receipt.

Bonus: Future Paladin POS version adds Description 2 to the invoice display screen and invoice.





How to set up the receipt message

- 1. In the **Paladin Configuration** (Setup) window, click the Forms tab, and then enter the following information:
 - Advance By-Line (up to 2 lines)
 - **Trailer By-Line** (up to 2 lines) **Note**: This text will not appear on the big form.
 - **Footer Line** (up to 4 lines)
 - **Invoice/Receipt Description** Note: The default is **INVOICE**.
 - **Logo** (Upload an image)
 - Invoice QR Code (Upload an image)
 - **QR Message** (up to 4 lines)
- Click Save.

The messages and images will appear on the receipt.





How to set up the signature message by class

Signature Required		
	Enable Signature Required	
	Signature Required Class Number	2222
	Signature Pad Line 1	By signing, you agree to comply with
	Signature Pad Line 2	the rules for purchasing spray paint.
	Signature Pad Line 3	
	Signature Pad Line 4	[
	Signature Pad Line 5	
Receipt Text		
	Enable Receipt Text	
	Receipt Text Class Number	3333
	Receipt Line 1	For best results
	Receipt Line 2	spray on a clean and dry surface
	Receipt Line 3	
	Receipt Line 4	[

- 1. In the **Paladin Configuration** (**Setup**) window, click the **Company** tab.
- 2. Select the Enable Signature Required checkbox, and then in the Signature Required Class Number box, enter a class ID.
- 3. In the **Signature Pad Line** boxes, enter the message text.
- 4. Select the **Enable Receipt Text** checkbox, and then **Receipt Text Class Number** box, enter a class ID.
- 5. In the **Receipt Line** boxes, enter the message text.

6. Click Save.

The messages will appear on the signature pad and/or the receipt.



How to set up the tax exempt message

Tax Exemption Require Signature for Tax Exemption Exemption Receipt Text	This transaction includes tax exempt item(s). It requires that you have a tax exemption number. You are responsible for reporting to the IRS.		
		Reset	Save

- 1. In the **Paladin Configuration** (**Setup**) window, click the **Tax** tab.
- 2. In the **Tax Exemption** pane, select the **Require Signature for Tax Exemption** check box.
- 3. In the **Exemption Receipt Text** box, enter the message.
- 4. Click Save.

The message will appear on the receipt.





Learn more

To learn more about this topic, see the following resources in our Help Portal:

- About messages for customers at check out
- How to print a message on a statement
- How to add a checkout screen note to a customer account
- About store credits
- How to apply a customer's store credit balance to a purchase
- How to turn off the store credit balance message

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





Next Weeks Webinar

Date: Tuesday, February 7th, 2017 9:00am pst

Title: A 400% Increase in Sales? Now that's Kentucky Magic!

Description:

When Jeff Harper purchased Farmers Hardware in Russellville, Kentucky, the store's best year was \$400K.

In his first twelve months as owner, Jeff was able to increase sales by over 400%! How did he do it?

Listen in on a live interview with Jeff as he recounts the steps he took to generate this stunning increase in sales.

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