

PALADIN DATA CORPORATION™

BizCoach Webinars

FREE ADVANCED TRAINING



**The new Help Portal:
One search, many happy returns**



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal: One search, many happy returns



- About the Help Portal
- Two monitors are better than one
- Four help libraries and icons
- Ways to search
- Giving feedback
- Going from Paladin Point of Sale to the Help Portal
- My Cases
- Request a new feature
- Remote Access
- Connecting to other websites
- Demo



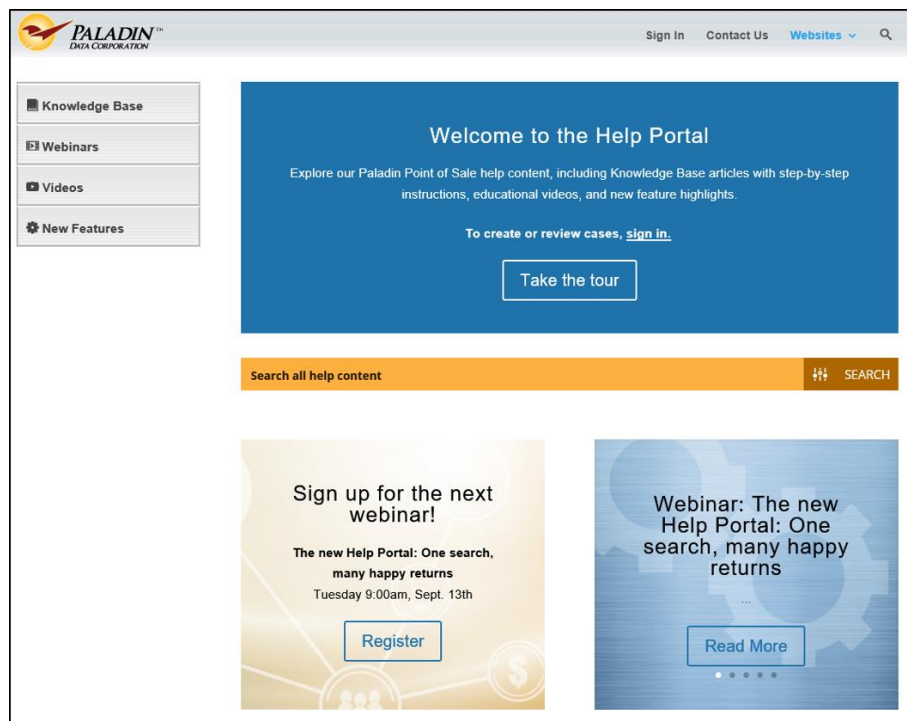
PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

About the Help Portal



- The Help Portal (<http://portal.paladinpos.com>) is a web site with four help libraries:
 - **Knowledge Base**
 - **Videos**
 - **Webinars**
 - **New Features**
- Access all help libraries without signing in.
- The Help Portal replaces the Client Portal.



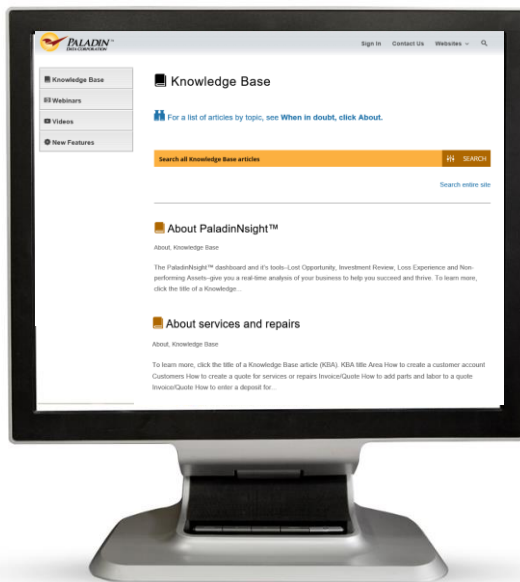
PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

Two monitors are better than one



- Follow the steps in the Help Portal while you perform the steps in Paladin Point of Sale.
 - Paladin Point of Sale on one monitor
 - Help Portal resources on a second monitor



PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

Four help libraries and icons



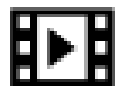
Knowledge Base

Get step-by-step instructions for how to use Paladin Point of Sale.



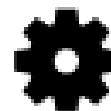
Videos

View training videos.



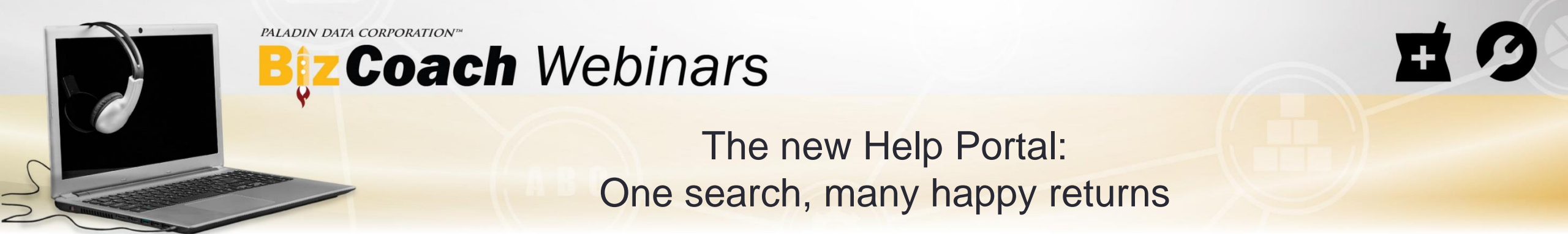
Webinars

View recordings of our weekly webinar series.



New Features

Read about new features.

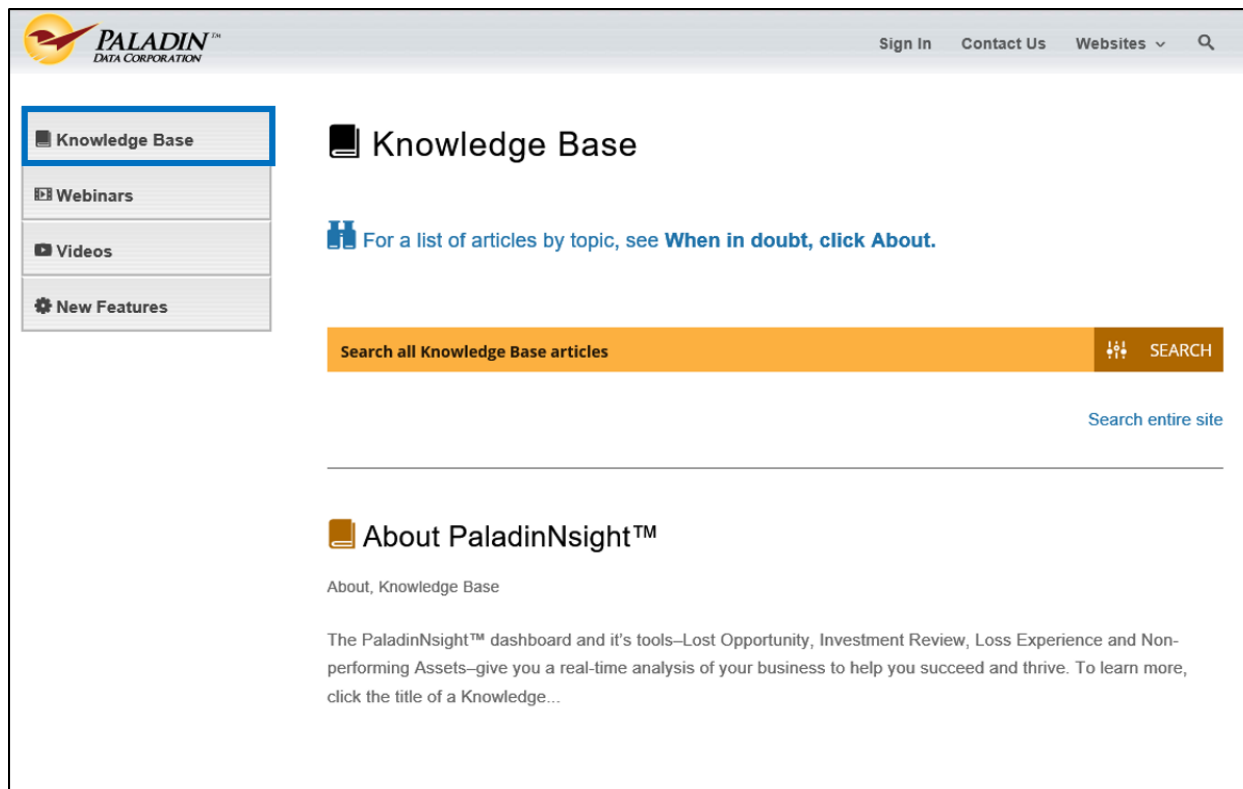


PALADIN DATA CORPORATION™

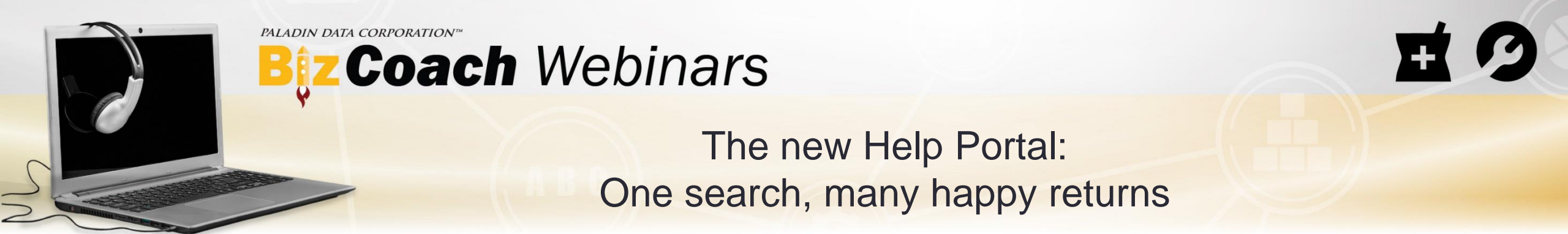
BizCoach Webinars

The new Help Portal:
One search, many happy returns

Knowledge Base articles (KBAs)



The **Knowledge Base** is a library of 'How to' articles that show you how to perform tasks in Paladin Point of Sale.



The new Help Portal:
One search, many happy returns

Webinars

The screenshot shows the Paladin Data Corporation website's BizCoach Webinars section. The header includes the Paladin logo and navigation links for Sign In, Contact Us, and Websites. A left sidebar contains a menu with Knowledge Base, Webinars (highlighted), Videos, and New Features. Below the menu is a section titled 'Have a webinar idea?' with a 'Submit Idea' button and instructions to vote. A featured webinar titled 'Supplier ratios' is shown with 8 votes and a description. The main content area has a 'Webinars' heading, a BizCoach Webinars banner, and a section for the next webinar: 'The new Help Portal: One search, many happy returns' on Tuesday 9:00am, Sept. 13th, with a 'Register' button. At the bottom is a search bar for webinars.

PALADIN DATA CORPORATION™
BizCoach Webinars

Sign In Contact Us Websites

Knowledge Base
Webinars
Videos
New Features

Have a webinar idea?
Submit Idea

To vote, press the + sign beside a webinar topic below.

+
8 votes
Supplier ratios
The ins and outs of supplier ratios.

Webinars

PALADIN DATA CORPORATION™
BizCoach Webinars

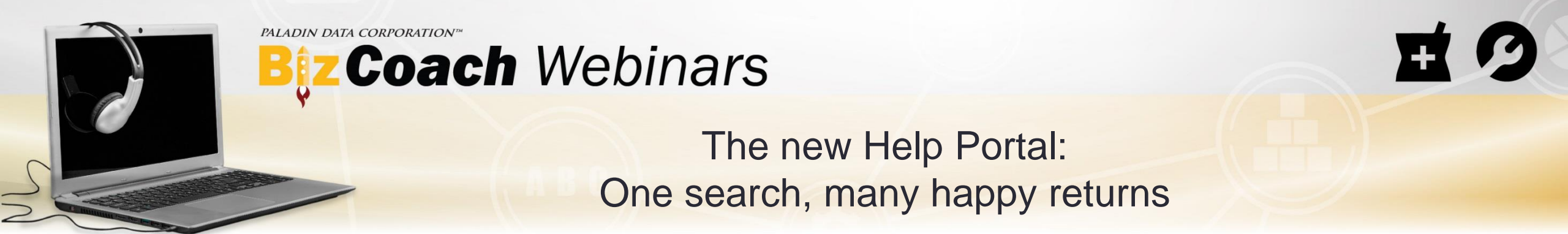
Sign up for the next webinar!
The new Help Portal: One search, many happy returns
Tuesday 9:00am, Sept. 13th
Register

Search webinars SEARCH

Webinars occur every Tuesday morning. The online presentations are about a variety of subjects. Recordings are always available in the **Webinars** library.

On the **Webinars** library page, you can:

- Register for the next webinar.
- Search for a webinar recording.
- Submit a new webinar idea or vote for an existing one.



PALADIN DATA CORPORATION™

BizCoach Webinars



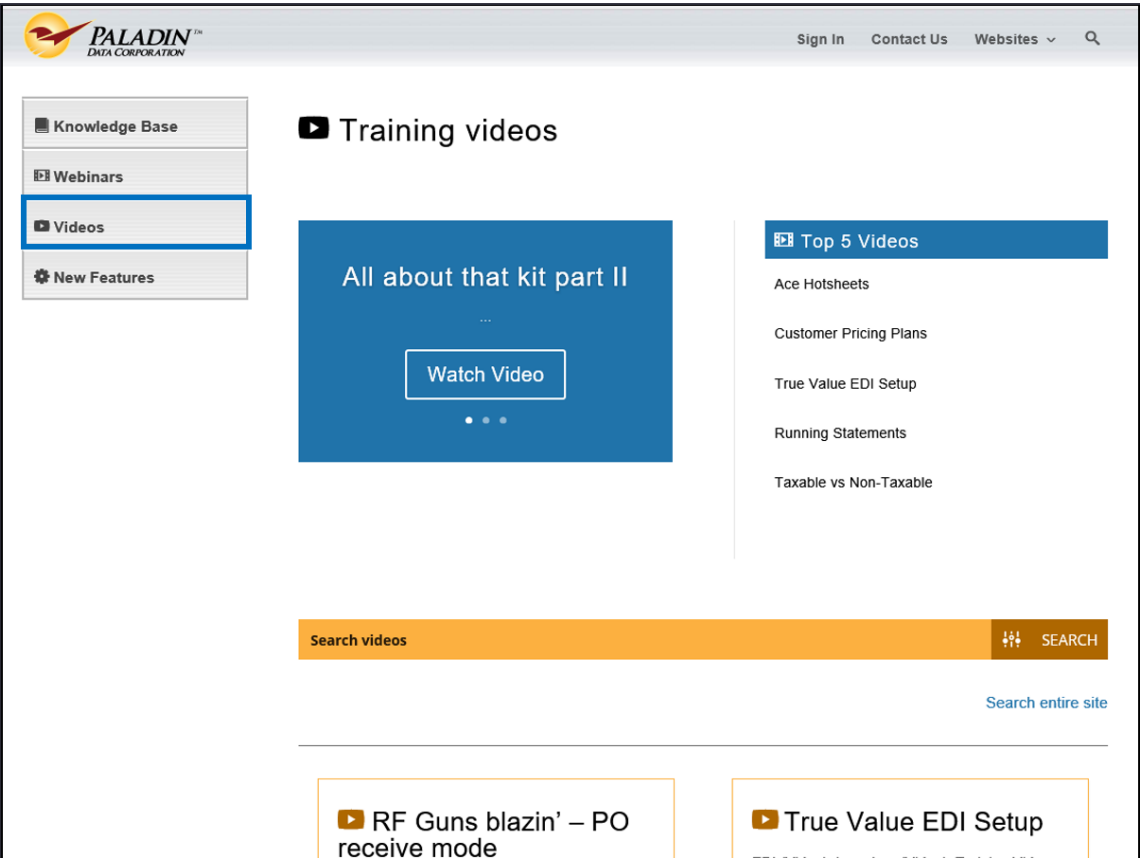
The new Help Portal:
One search, many happy returns

Videos

Videos provide training for many types of tasks.

On the **Videos** library page, you can search for many topics.

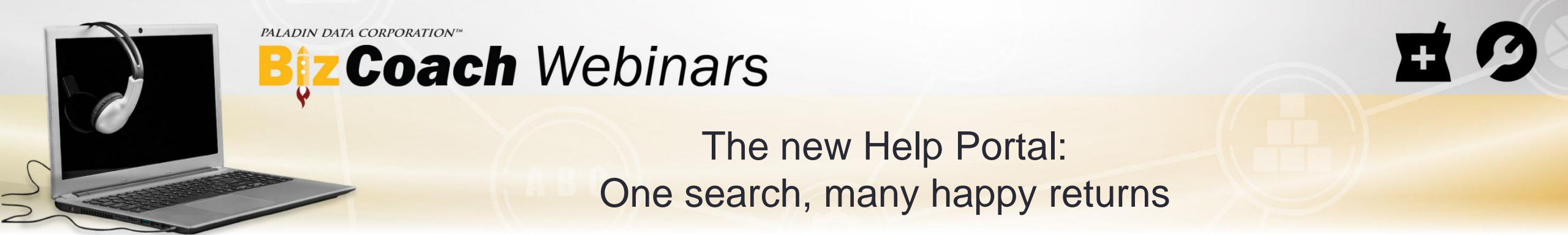
Webinars are also considered videos, and may appear in your search results. You can tell webinars apart from other videos by the icons.



Webinar



Video



PALADIN DATA CORPORATION™

BizCoach Webinars

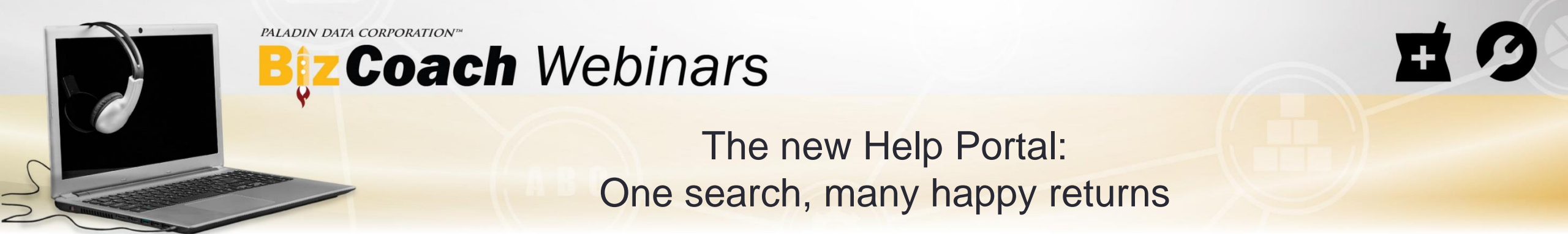
The new Help Portal:
One search, many happy returns

New Features

A screenshot of the Paladin Data Corporation New Features library page. The page has a header with the Paladin Data Corporation logo, a 'Sign In' link, a 'Contact Us' link, and a 'Websites' dropdown menu. On the left, there is a sidebar with links to 'Knowledge Base', 'Webinars', 'Videos', and 'New Features' (which is highlighted). The main content area is titled 'New Features' and includes a 'See all features and updates >' link. Below this, there are two blue buttons: 'When will I have these features or updates?' and 'When can I use these features?'. An 'IMPORTANT' notice states: 'Feature notices are typically published prior to their public release. Hover for more info.' Below the notice is a search bar with the text 'Search features and updates' and a 'SEARCH' button. A link 'Search entire site' is also present. The first feature listed is 'No-discount pricing rule for inventory items', with a 'New Features' tag. The build information is 'Build: 9894 Build date: 1-Jun-16'. The description reads: 'You can prevent an inventory item from being automatically discounted by setting the new Net pricing rule on the Pricing tab in the Inventory module. When you apply the Net pricing rule to an item has the following discount...'

The **New Features** library tells you about Paladin Point of Sale features and updates that you will have in the upcoming general release.

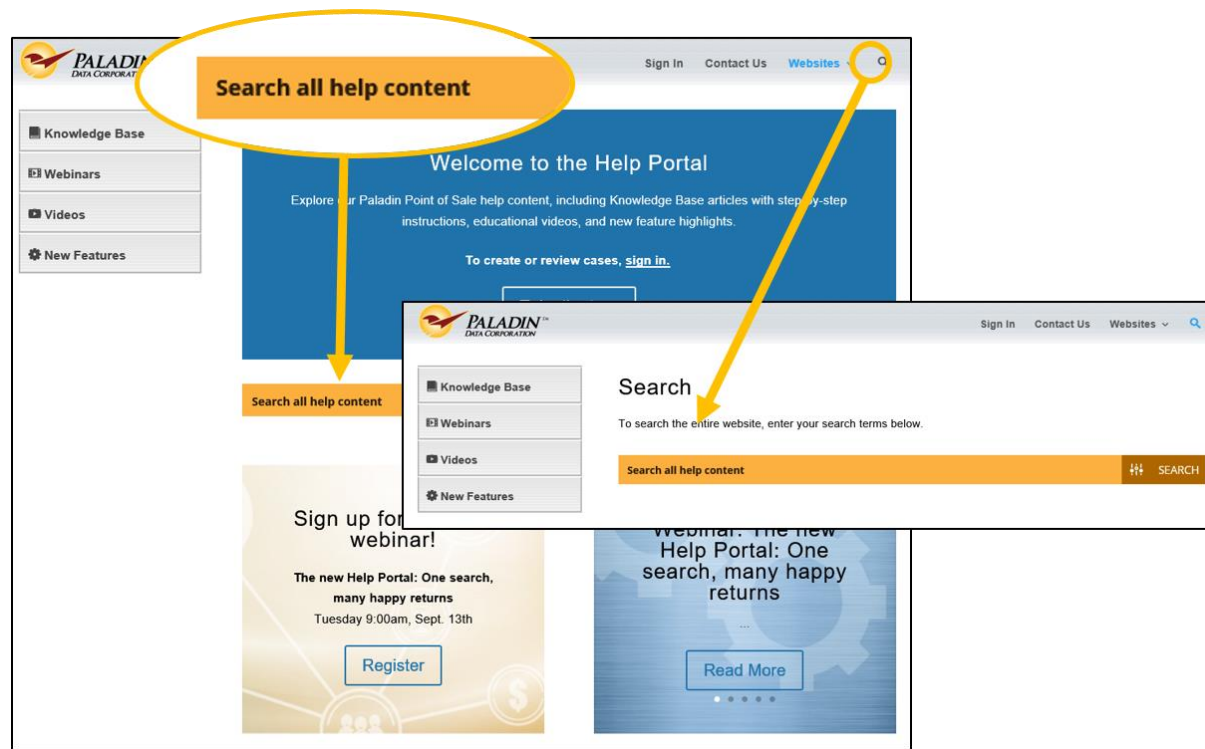
On the **New Features** library page, you can view recent features and search the history of features and updates.



The new Help Portal: One search, many happy returns

Ways to search

Search all libraries



Search one library



Enter terms in the search bar:

- Keywords
- Title
- ID number
- About [topic]



PALADIN DATA CORPORATION™

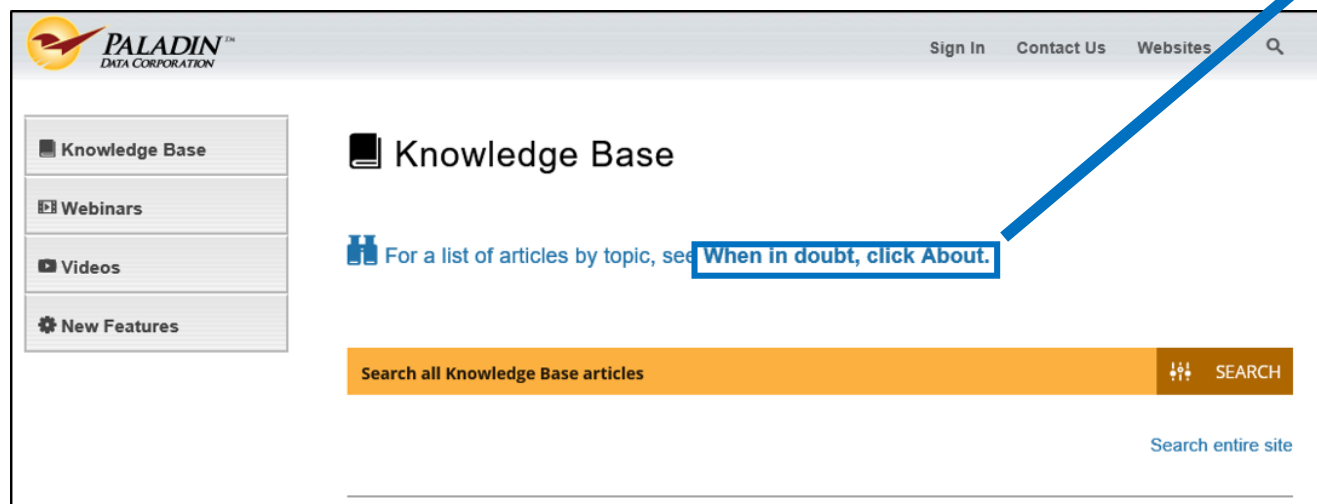
BizCoach Webinars



The new Help Portal:
One search, many happy returns

Another way to search for KBAs: [When in doubt, click About](#)

- See list of titles by topic.
- Click an About title for a KBA about that topic.
- Link from title to article.



About: When in doubt, click About

About, Knowledge Base | ID: 6431

To get a list of articles about a subject, click any of the following About articles. For example, to find topics about purchase orders, click **About purchase orders**.

Title

About adjustments
About Advanced Lookup
About automatic daily backups
About BOGO sales
About cash drawers
About cash drops
About creating reports in Paladin Point of Sale



The new Help Portal: One search, many happy returns

The About system

About: When in doubt, click About

Click title to open the
About article.

About adjustments

Click KBA title
to open article.

To lead to Knowledge Base article (KBA).

Title

About adjustments

About Advanced Lookup

About automatic daily backups

About BOGO sales

About cash drawers

About cash drops

About creating reports in Paladin Point of Sale

About customer accounts

About defective items

About exporting data to QuickBooks

KBA Title

Area

How to create a new department for adjustments

Set up-Dept

How to create a new inventory item for adjustments

Inventory

How to create a new department for adjustments

Knowledge Base, Setup | ID: 6470

1. Open Paladin Point of Sale.
2. On the **File** menu, click **Setup**.
3. In the **Paladin Configuration** window, click the **Dept** tab.
4. In the **Departments** pane, click **New**.
5. In the **Name** box, enter **Adjustments**.
6. In the **Department Label Number** box, assign an unused department label number.
7. Click to select the **Department Non-taxable** check box.
8. Click **Close**.
9. In the **Save** window, click **Yes**.



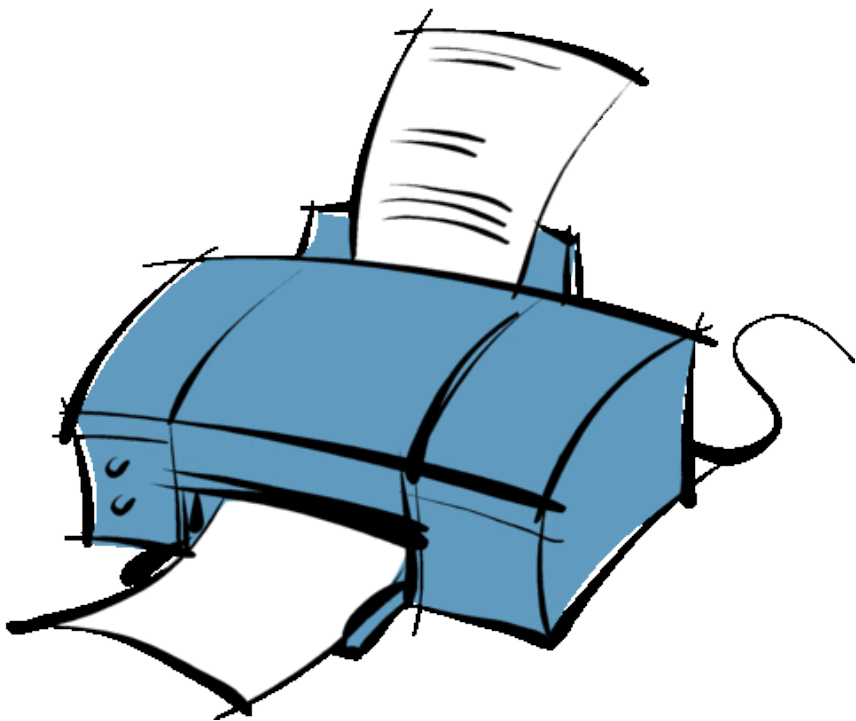
PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

Printing a KBA



1. Right-click in the body of the article, and then select **Print**.
2. In the left navigation pane, click **Print**.



PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

Giving library article feedback

At the end of any library topic (KBA, webinar, video, feature or update), you can:

- Click **Helpful** or **Unhelpful**.
- Use the form to tell us how we can improve our content.

The screenshot shows the Paladin Data Corporation Help Portal interface. On the left is a sidebar with navigation links: My Cases, Knowledge Base, Webinars, Videos, New Features, and Remote Access. The main content area displays a library article titled "How to add parts and la...". Below the article title is a list of 9 numbered steps for adding parts and labor. At the bottom of the article, there are two blue buttons: "Helpful" and "Unhelpful". Below these buttons is a feedback form titled "Suggest ways to make this article better:" with a large blue text input area. Below the input area is a section titled "Provide your email address. (Optional)" with a privacy notice and two radio buttons for "Yes" and "No". A "Send" button is at the bottom of the form.

Helpful Unhelpful

Suggest ways to make this article better:

Feedback input area for suggesting ways to make the article better.

Provide your email address. (Optional)

We respect your privacy. If you provide your email address, we will use it only if we have more questions about your feedback.

☐ Yes

☐ No

Send



PALADIN DATA CORPORATION™

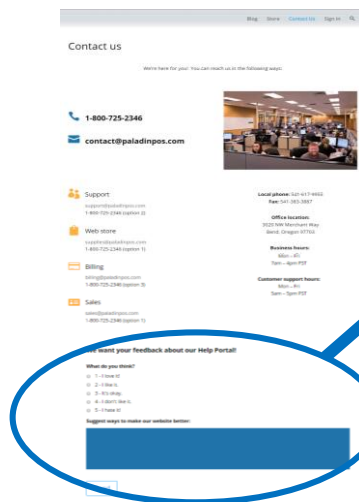
BizCoach Webinars



The new Help Portal:
One search, many happy returns

Giving website feedback

Use the form at the end of the **Contact us** page to tell us ways to improve our website.



We want your feedback about our Help Portal!

What do you think?

- ☐ 1 - I love it!
- ☐ 2 - I like it.
- ☐ 3 - It's okay.
- ☐ 4 - I don't like it.
- ☐ 5 - I hate it!

Suggest ways to make our website better:

Send



PALADIN DATA CORPORATION™

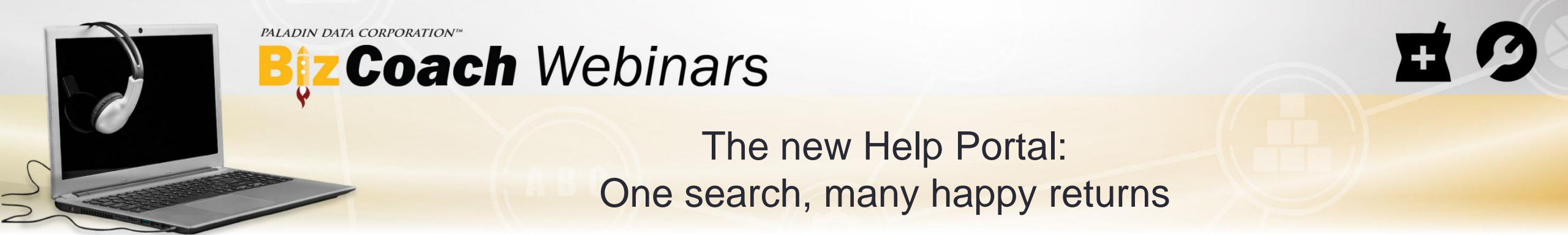
BizCoach Webinars



The new Help Portal:
One search, many happy returns

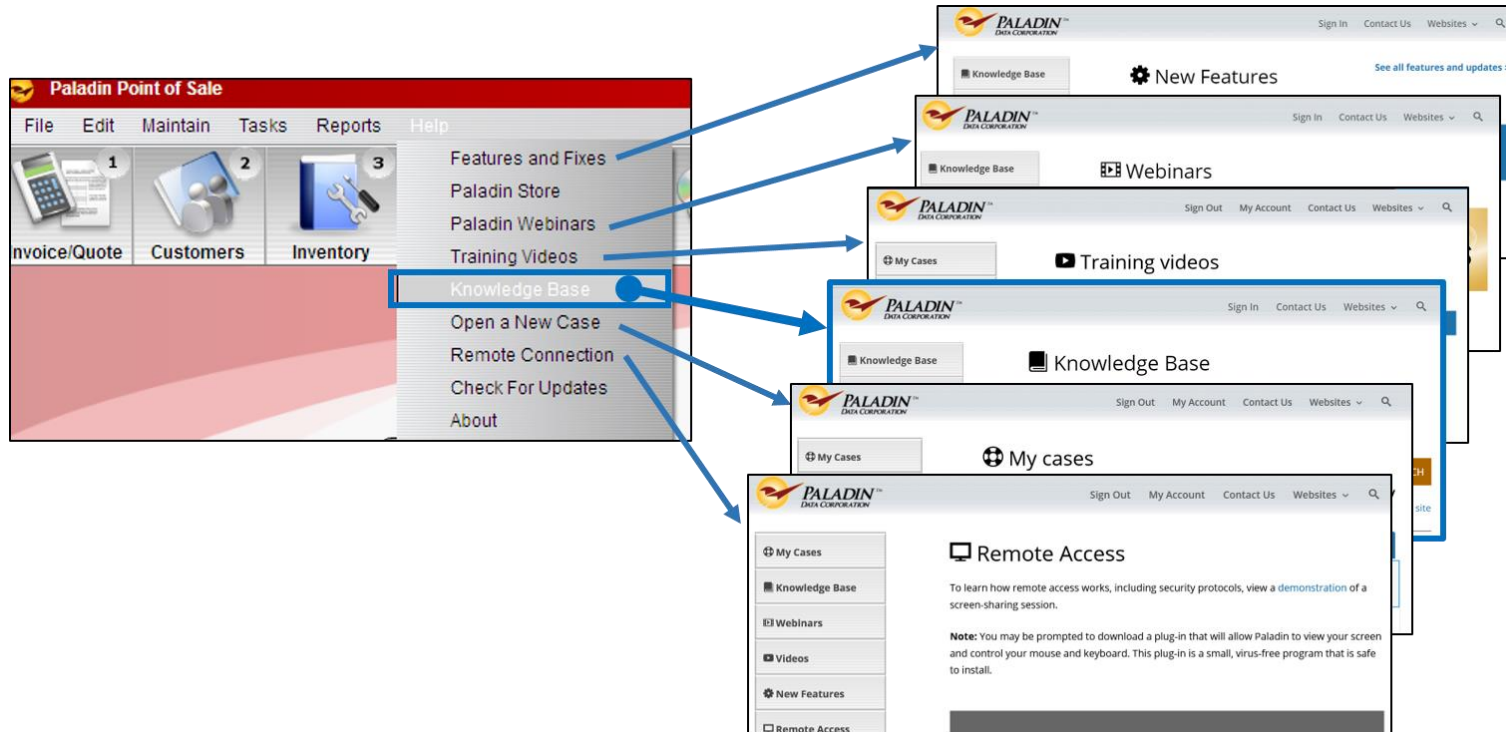
Giving webinar feedback

- Submit and vote on webinar ideas:
 - Click **Submit Idea** on the **Webinars** library page.
 - Click the plus sign (+) to vote on ideas that you like.



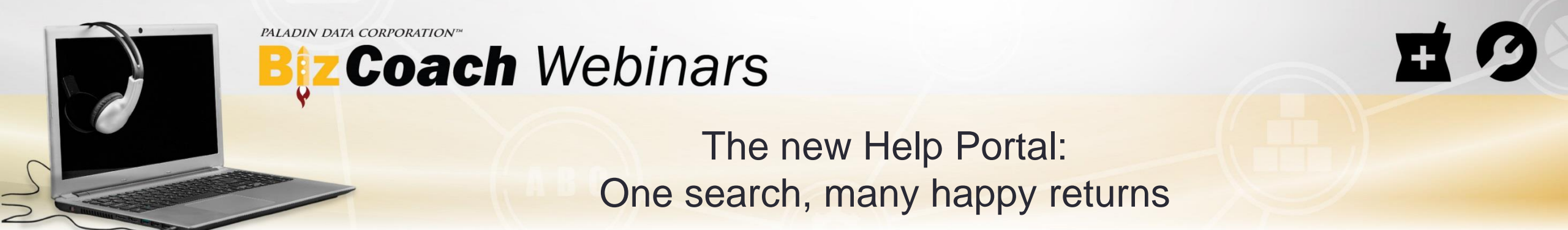
The new Help Portal:
One search, many happy returns

Going from Paladin Point of Sale to the Help Portal



With Paladin Point of Sale build 9976, the Help menu will open the Help Portal in a separate browser window.





The new Help Portal:
One search, many happy returns

My Cases

With Paladin Point of Sale build 9976, you will use the Help Portal to create a case.

You must sign in and use the username and password that you use to access the Paladin Store.

Sign In Contact Us Websites

Knowledge Base
Webinars
Videos
New Features

Username/Email
testcustomer

Password

Sign in
Forgot password?

Sign Out My Account Contact Us Websites

My cases

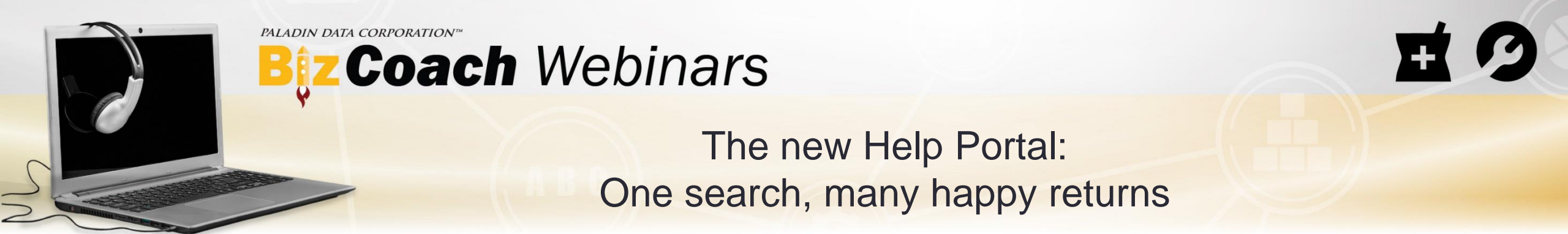
Show 5 entries Search:

Title	Number	Status	Created On
Setup EDI processing	CAS-00000-N0000	Active	07/06/2016

Title Number Status Created On
Active

Showing 1 to 1 of 1 entries (filtered from 15 total entries) Previous 1 Next

Create a case Suggest a new feature

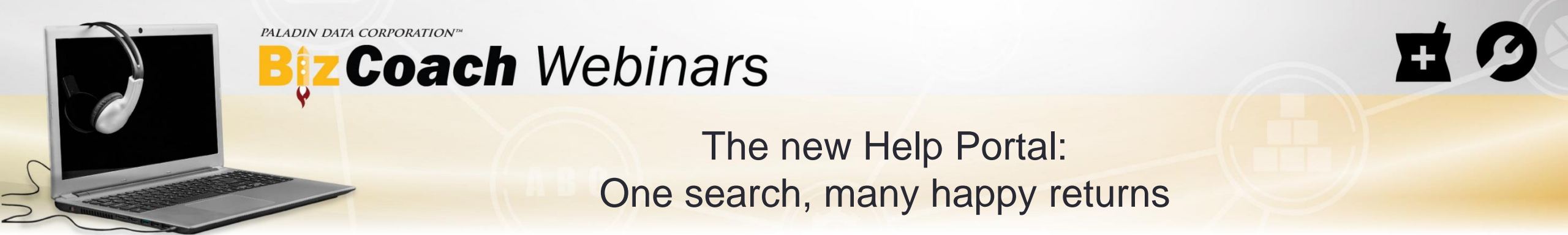


The new Help Portal: One search, many happy returns

Create a case

The screenshot shows the 'My Cases' page of the Paladin Data Corporation Help Portal. On the left is a navigation menu with links to 'My Cases', 'Knowledge Base', 'Webinars', 'Videos', 'New Features', and 'Remote Access'. The main content area is titled 'My cases' and shows a list of cases with columns for 'Title' and 'Status'. A 'Show 5 entries' dropdown is visible. At the bottom of the list, a blue button labeled 'Create a case' is highlighted with an orange box and an arrow pointing to the 'Create a case' form on the right. The form includes fields for 'Title', 'Case Type', 'Your name', 'Your email', 'Your phone', and 'Description'. It also has a checkbox for 'I'm not on this list, I'd like to add a contact', an 'Upload a file' section, and a 'Terms & conditions' section with a checkbox. A 'Submit case' button is at the bottom.

- On the **My Cases** page, click **Create a case**, and then complete the form.
- You will receive an email confirmation.
- Look for follow-up emails and voice mails .
- Your case will be closed seven (7) days after we contact you, if we don't hear back from you .



The new Help Portal:
One search, many happy returns

Suggest a new feature

With Paladin Point of Sale build 9976, click **Suggest a new feature** to give us an idea for improving Paladin Point of Sale or to request a custom programming quote.

The screenshot shows the Paladin Data Corporation website. At the top, there's a navigation bar with links: 'Sign Out', 'My Account', 'Contact Us', and 'Websites'. Below this, the 'My cases' section is visible, showing a table of cases. A 'Suggest a new feature' form is overlaid on the left side of the page. The form has the following fields: 'Suggestion type *' (a dropdown menu), 'Your name *' (a text input field), 'Your email *' (a text input field), and 'Description *' (a large text area). Below the description field is a 'Send your suggestion' button. An orange arrow points from the 'Suggest a new feature' button in the bottom right corner of the 'My cases' section to the 'Suggestion type *' dropdown in the form.

Number	Status	Created On
CAS-71577-CTG8C7	Active	09/08/2016

Number	Status	Created On
	Active	

entries) Previous 1 Next

[Suggest a new feature](#)

Suggest a new feature

Suggestion type *

Choose one

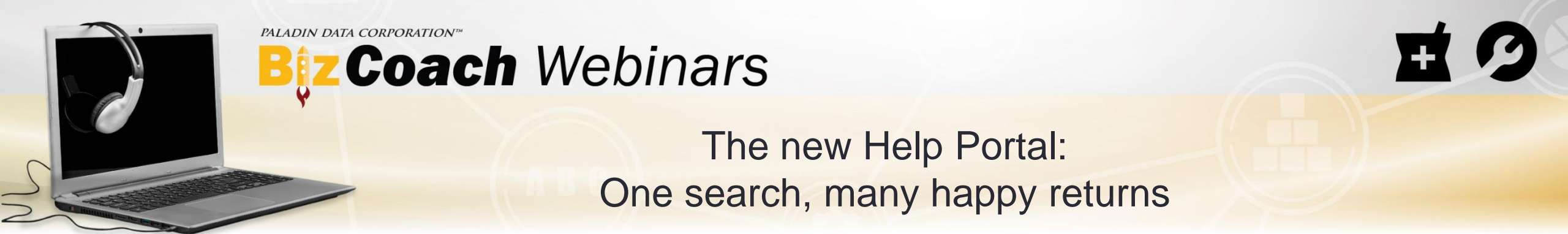
Your name *

Your email *

Description *

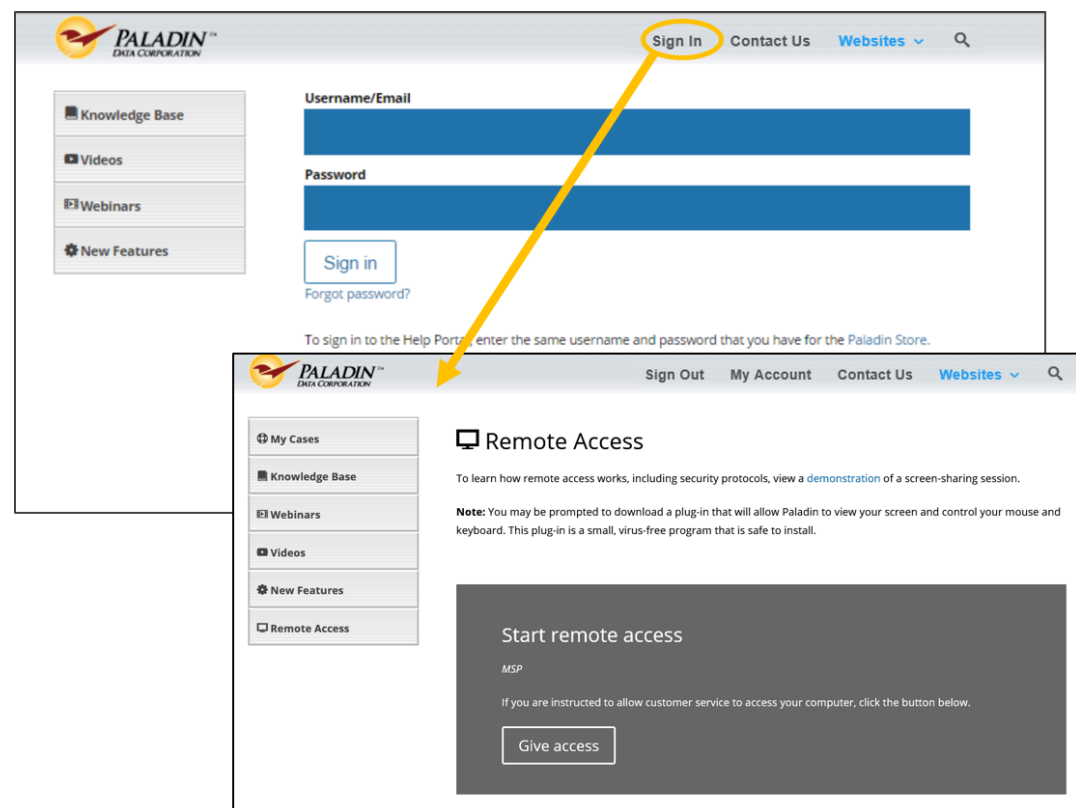
Have an idea of how to make Paladin Point of Sale better? Tell us about it.
Interested in a quote on custom programming? Tell us what you are looking for.

Send your suggestion



The new Help Portal:
One search, many happy returns

Remote Access



With Paladin Point of Sale build 9976, you will use the Help Portal to give a Paladin representative access to your computer.

You must sign in to grant access.



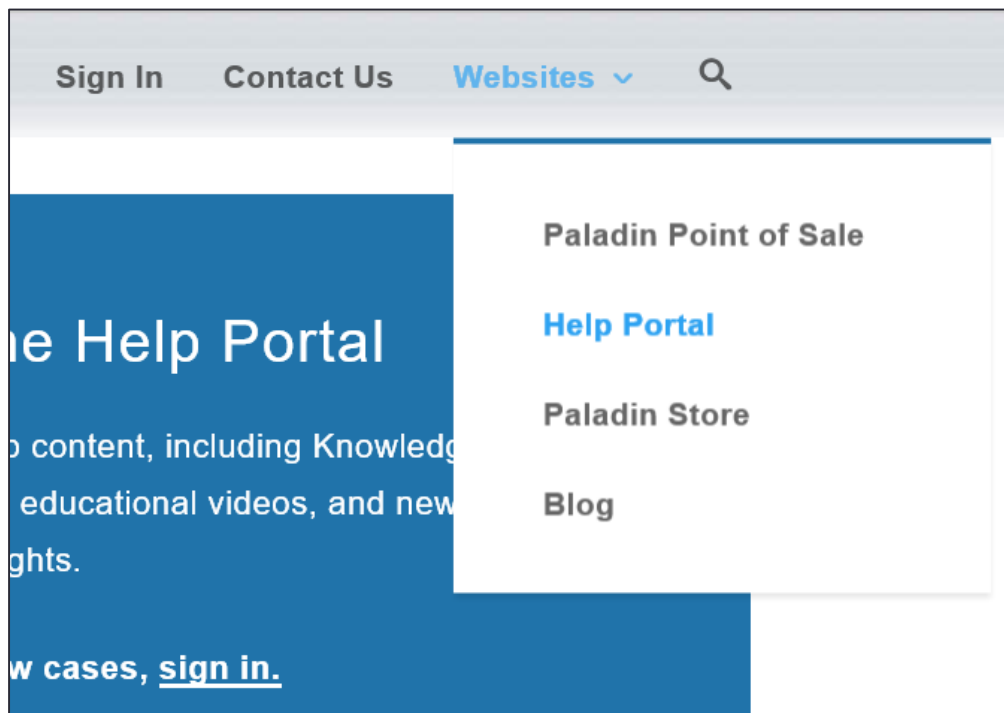
PALADIN DATA CORPORATION™

BizCoach Webinars

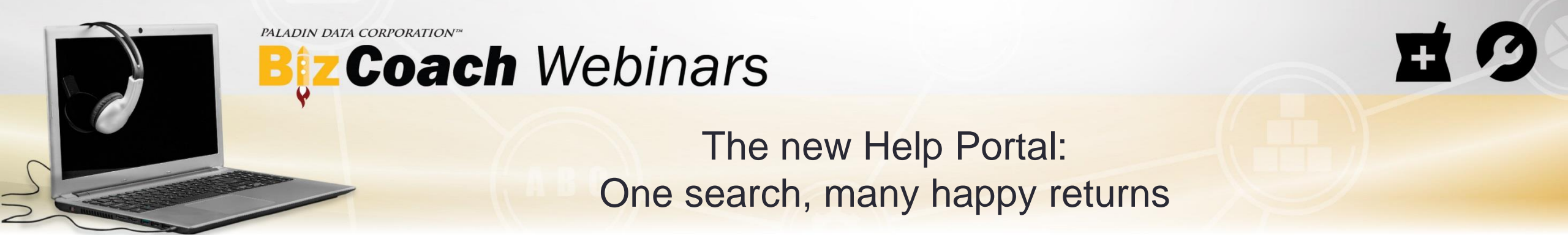


The new Help Portal:
One search, many happy returns

Connecting to other websites



- From any page, you can easily switch among these websites:
 - Paladin Point of Sale
 - Help Portal
 - Paladin Store
 - Blog



PALADIN DATA CORPORATION™

BizCoach Webinars

The new Help Portal:
One search, many happy returns

DEMO



PALADIN DATA CORPORATION™

BizCoach Webinars



The new Help Portal:
One search, many happy returns

Learn more

To learn more, see the following resources:

- [Tour the Help Portal](#)
- [Knowledge Base](#)
 - [When in doubt, click About](#)
- [Webinars](#)
- [Videos](#)
- [New Features](#)

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

PALADIN DATA CORPORATION™

BizCoach Webinars

FREE ADVANCED TRAINING



Recording available at:

portal.paladinpos.com/webinars

