

EXCELLENCE IN COACHING



TOP 5 BEST PRACTICES USING PALADIN

by Mike Horn

Technical Level:

Easy

Intermediate

Advanced



EXCELLENCE IN COACHING:



ONE (1)

Reviewing Your Investment



- Cleaning and maintaining the look of your investment on the shelf
- (Daily) Cycle Count the inventory items
- (New Feature) Paladin POS Dashboards



Processing Returns

Inventory

Customer

History

Backup

Exit

Random Support

Cancel

Customer: *BARBIE LUHMAN

Invoice

Part

Part + Customer

Part: 10111

SO#: 52

Part Number

10111

Find >>

Description: PAINTBRSH FOAM 2" JEN

Price: 1.29

F1

Results

Qty	Customer	Invoice #	Price Sold	Qty Sold	Date Sold
0.00	*BARBIE LUHMAN	582036	\$1.29	2.00	31-Mar-15
0.00	*HEATHER CONDOS	581627	\$1.29	3.00	31-Mar-15
0.00	*JOHN GOLIGOSKI	581247	\$1.29	2.00	30-Mar-15
0.00	*JAMES F STRIEBEL	581142	\$1.29	1.00	30-Mar-15
0.00	*KRISTA KANENWISHER	580867	\$1.29	1.00	30-Mar-15
0.00	*ROBERTA PERDOMO	580729	\$1.29	1.00	30-Mar-15
0.00	NATHAN BODDY	580585	\$1.29	4.00	30-Mar-15
0.00	*MICHELLE HOLTON	580388	\$1.29	2.00	29-Mar-15
0.00	*STEVE BANKS	580359	\$1.29	1.00	29-Mar-15
0.00	CASH SALE	580219	\$1.29	1.00	29-Mar-15
0.00	*RANDY MATHIS	579968	\$1.29	2.00	29-Mar-15
0.00	CINDY STEFKA	578957	\$1.29	2.00	28-Mar-15
0.00	*LOLA GRENFELL	578789	\$1.29	1.00	28-Mar-15
0.00	MELISSA CHANEY	578733	\$1.29	1.00	27-Mar-15
0.00	*RON NECITA	578725	\$1.29	2.00	27-Mar-15

Recent History

Double-click a row for more detailed transaction information.

F8

Add Items to Invoice

- Return the item(s) for the original amount that you sold the item for, even without a receipt.
- Never give the wrong amount back when returning an item that was on an old sale that is now over.



EXCELLENCE IN COACHING:



THREE (3)

Collect Customer Information Up Front

- Track your customers habits in your store so as to make educated decisions to appeal to them.
- Increase Turns by identifying your patrons spending habits
- Identify your loyal customers

The screenshot shows a software window titled "Add Customer" with a red header bar. The window contains several input fields and checkboxes. The "Name" field is filled with "Jane Doe". The "Address" field is empty. The "City" field is empty. The "State" field is a dropdown menu. The "Zip" field is empty. The "Credit Limit" field is set to "0". The "Form Control" section has several checkboxes: "E-mail invoice copies?", "E-mail statement copies?", "Create month end statement?", "Force invoice to log form?", and "Force sales rpt to 1 invoice per page?". The "Checkout Screen Note" section has a text area for notes. The window has a menu bar at the top with options like "File", "Edit", "Maintain", "Tools", "Reports", and "Help". The bottom of the window has a toolbar with icons for "Advanced Lookup", "Add Customer", "Rename Customer", "Authorized Signers", "Account Payment", "Payment Management", "Adjust Pricing Plans", "Tax", "View Past Statements", and "Save".



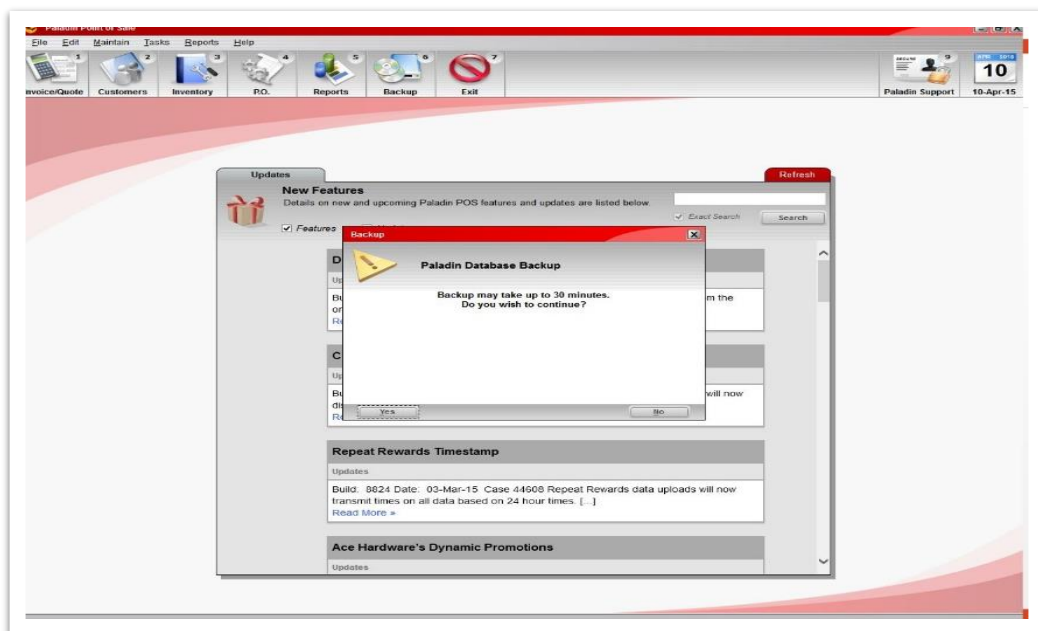
EXCELLENCE IN COACHING:



FOUR (4)

Backups

- Computer Viruses are getting more and more prevalent.
- Hardware does fail.
- Your data is very valuable
- (Offsite Backups) Time and unforeseen occurrences do happen.





EXCELLENCE IN COACHING:



FIVE (5)

Ordering Through Paladin

- Tracking your order history
- Saves Time
- Helps with not over ordering product
- See purchase history with suppliers

The screenshot displays the 'Paladin Point of Sale' software interface. At the top, there's a menu bar with options like 'File', 'Edit', 'Maintain', 'Tools', 'Reports', and 'Help'. Below the menu is a toolbar with icons for various functions. The main window is titled 'Purchase Order' and contains a 'Confirm P.O.' dialog box. The dialog box has fields for 'Days' (set to 14), 'Supplier' (100096 - PACIFIC MERCHANTS), 'Address 1' (19 SOUTH BARRINGTON AVE), 'City/State/Zip' (LOS ANGELES, CA, 90049), 'Address 2' (#507), 'Phone' (818988999), and 'Fax'. Below these fields is a table with columns: 'Part Number', 'Description', 'SOH/ORD', 'Quantity', 'Cost', and 'Extension'. The table lists four items: 1. SPRING BRAD SET 3/32, 2. SPRING COLD CHISEL 5/16, 3. SPRING CENTER PUNCH, and 4. SPRING WD CHISEL 5/16. Each item has a 'Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%' status. At the bottom of the dialog box, there's a 'Total \$' field showing 118.75. The bottom of the software window features a toolbar with icons for 'Advanced Lookup', 'Add Note', 'Delete Line Item', 'Recall Inventory', 'Store P.O.', 'Stock Check', and 'Confirm P.O.'.

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
000081	1 SPRING BRAD SET 3/32	EACH	0	1 \$ 6.250	\$ 6.25
000081	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%		0		
000199	2 SPRING COLD CHISEL 5/16	EACH	0	2 \$ 6.250	\$ 12.50
000199	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%		0		
000212	3 SPRING CENTER PUNCH	EACH	0	7 \$ 6.250	\$ 43.75
000212	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%		0		
000205	4 SPRING WD CHISEL 5/16	EACH	0	9 \$ 6.250	\$ 56.25
000205	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%		0		

Total \$ 118.75

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