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FREE ADVANCED TRAINING



Sell items over time with Order Manager

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- What is the Order Manager?
- Recall the order to view and sell
- Turn quotes into orders
- Use three new tools
- Add additional items to an order
- Complete the order
- Demo in Paladin
- Learn more



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What is the Order Manager?



- This new feature lets you turn a quote into an order, sell the order items over time, and track what you've sold and what remains to be sold.
- The order will remain open until all items are purchased or you manually close the order.
- This will allow you to better manage large, complicated orders from your customers.
- This feature is available to you automatically. No set up is required. Just look for **Order Manager** to appear on the bottom ribbon when you recall a quote.



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Recall the order to view and sell

The screenshot shows the 'Recall Transaction' dialog box in the software. The 'Quote - Order' radio button is selected. A blue arrow points to a green checkmark in the 'Order' column of the table below.

Name	Memo	Order	Date	Emp #	Acct #
Foxwood house	Foxwood house remodel	✓	15-Dec-17 14:50	2	2046
Redwood house	Redwood house remodel		15-Dec-17 16:30	2	2046

- In the **Invoice/Quote** module, click **Recall Transaction**, and then select **Quote - Order**.
- Active orders are identified by a green checkmark in the **Order** column.
- Orders not marked by this green checkmark are simply quotes.



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Turn a quote into an order

The screenshot shows the 'Checkout' window in the software. The window title is 'Invoice / Quote' and 'Checkout'. The 'Customer' is '2046 - JOHN SMITH BUILDERS'. The 'Address 1' is '100 Main Street' and 'City/State/Zip' is 'Somewhere, ID, 01234'. The 'Credit' is '20,000.00'. The 'Part Number', 'Description', 'Quantity', 'Price', and 'Extension' columns are visible. A blue arrow points from the 'Quantity' column to the 'Order Manager' button on the ribbon.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P98765	Paint brush - 3 in	10	\$ 4.99	\$ 49.90
			2				
			P98765	4.99			
			50				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P54321	Paint brush - 2 in	20	\$ 4.49	\$ 89.80
			3				
			P54321	4.49			
			30				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L12345	Ladder - 5 foot	1	\$ 30.00	\$ 30.00
			4				
			L12345	30.00			
			5				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T12345	PAINTING TAPE 6" X 100' BRN	10	\$ 4.39	\$ 43.90
			5				
			T12345	4.39			
			200				

SOH GRD

F1 Advanced Lookup F2 Add Note F3 Delete Line Item F4 Discount Item F5 Order Manager F6 Store Transaction F7 Stock Check F8 Checkout

Subtotal \$ 1,963.60
Tax \$ 267.05
Total \$ 2,230.65

1. In the **Invoice/Quote** module, recall the quote, and then, on the bottom ribbon, click **Order Manager** or press F5.
2. When you select **Order Manager**, all items on the original quote will become order items.
3. To complete the transition from quote to order, enter the item(s) to be sold in the **Quantity** field.

Note: An order item shows the original quoted amount and tracks the number of items already sold.

Note: If you are not ready to make a sale, close this view, and the quote will remain.



Order Tool – Displaying Open | All

- In the **Displaying All** mode, all items on the original quote will appear.
- In the **Displaying Open** mode, only items with unsold quantities will appear.

Order Manager **Checkout** Cancel

Rewards Customer 2046 - JOHN SMITH BUILDERS
 Credit 20,000.00 Address 1 100 Main Street

In the Displaying Open view, only items with unsold quantities appear.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P54321	Paint brush - 2 in	EACH	4.49	\$ 0.00
28	0		P54321		Quote: 20 Sold: 2		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L12345	Ladder - 5 foot	EACH	30.00	\$ 0.00
5	0		L12345		Quote: 1 Sold: 0		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T12345	PAINTING TAPE 6"X180' BRN	EACH	4.39	\$ 0.00
200	0		T12345		Quote: 10 Sold: 0		

Items below this line are not of the managed order.

NOTES

SOH ORD

F1 Advanced Lookup
 F2 Add Note
 F3 Delete Line Item
 F4 **Displaying Open | All**
 F5 Item History
 F6 Auto-fill Quantity
 F7 Stock Check
 F8 Checkout

Subtotal \$	0.00
Tax \$	0.00
Total \$	0.00



Order Tools – Item History

The screenshot shows the Order Manager software interface. The main window is titled "Order Manager" and has a "Checkout" ribbon. The customer is "2046 - JOHN SMITH BUILDERS". The "Order History" dialog box is open, showing a table of sales history for a selected item.

Inv #	Date	Quantity Sold	Price	Extension
161200	15-Dec-17 15:23	2	4.49	\$ 0.00
			30.00	\$ 0.00
			4.39	\$ 0.00

The bottom ribbon contains several buttons: F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Displaying Open | All, F5 Item History (highlighted with a blue box), F6 Auto-fill Quantity, F7 Stock Check, and F8 Checkout. A summary table on the right shows Subtotal \$ 0.00, Tax \$ 0.00, and Total \$ 0.00.

When you highlight an order item that has been partially or fully sold, the **Item History** button will appear on the bottom ribbon.

The **Item History** provides the item's sale history for that order.



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Order Tools – Auto-fill Quantity

When you highlight one or more order items that have not been fully sold, and click **Auto-fill Quantity** or press F6, the **Quantity** value will show each order item's unsold amount.

Note: If you manually enter an order item quantity that exceeds the unsold order amount, the quantity will be automatically reduced to the unsold number.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P12345	Latex Outdoor Paint - 1 gal	EACH	0 \$ 35.00	
50	0		P12345		Quote: 50 Sold: 0		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P98765	Paint brush - 3 in	EACH	0 \$	
50	0		P98765		Quote: 10 Sold: 0		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P54321	Paint brush - 2 in	EACH	18 \$ 4.40	
28	0		P54321		Quote: 20 Sold: 2		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L12345	Ladder - 5 foot	EACH	0 \$ 30.00	\$ 0.00
5	0		L12345		Quote: 1 Sold: 0		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T12345	PAINTING TAPE 6"X180' BRN	EACH	0 \$ 4.39	\$ 0.00
200	0		T12345		Quote: 10 Sold: 0		

Subtotal \$ 80.82
Tax \$ 10.99
Total \$ 91.81



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Add additional items to an order

Order Manager **Checkout** Cancel

Rewards Customer 2046 - JOHN SMITH BUILDERS Address 2 Phone

Credit 20,000.00 Address 1 100 Main Street City/State/Zip Somewhere, ID, 01234 Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L12345	LADDER - 5 FOOT	0	\$ 30.00	\$ 0.00	
5	0		L12345		Quote: 1 Sold: 0			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T12345	PAINTING TAPE 6"X180' BRN	0	\$ 4.39	\$ 0.00	
200	0		T12345		Quote: 10 Sold: 0			
Items below this line are not part of the managed order.				NOTES				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	005280101	SELF-STICK NOTE PAD 40 S	4	\$ 2.49	\$ 9.96	
0			005280101		2.49			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
SOH		ORD						

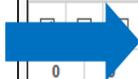
F1 Advanced Lookup
 F2 Add Note
 F3 Delete Line Item
 F4 Displaying Open | All
 F5 Item History
 F6 Auto-fill Quantity
 F7 Stock Check
 F8 Checkout

Subtotal \$	9.96
Tax \$	1.35
Total \$	11.31

You can add additional items to an order invoice before you complete a sale.

This note will appear: **Items below this line are not part of the managed order.**

Not an order item





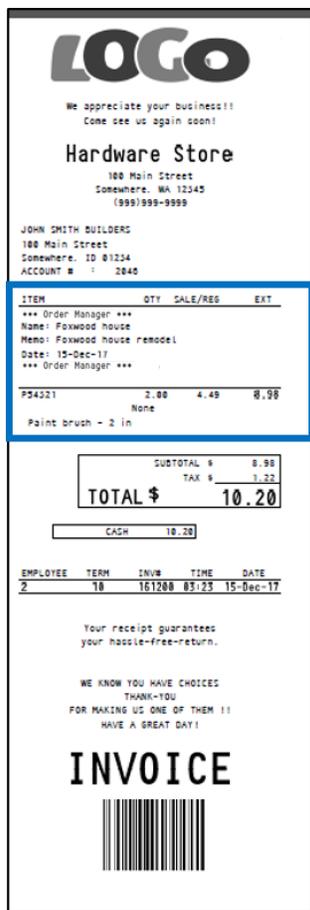
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Complete the order



LOCO
We appreciate your business!!
Come see us again soon!
Hardware Store
100 Main Street
Somewhere, WA 12345
(999)999-9999

JOHN SMITH BUILDERS
100 Main Street
Somewhere, ID 01234
ACCOUNT # : 2040

ITEM	QTY	SALE/REG	EXT
*** Order Manager *** Name: Foxwood house Memo: Foxwood house remodel Date: 15-Dec-17 *** Order Manager ***			
P54321	2.00	4.49	8.98
Paint brush - 2 in			

SUBTOTAL \$ 8.98
TAX \$ 1.22
TOTAL \$ 10.20

CASH 10.20

EMPLOYEE	TERM	INVS	TIME	DATE
2	10	161200	03:23	15-Dec-17

Your receipt guarantees
your hassle-free-return.

WE KNOW YOU HAVE CHOICES
THANK-YOU
FOR MAKING US ONE OF THEM !!
HAVE A GREAT DAY!

INVOICE



ITEM	QTY	SALE/REG	EXT
*** Order Manager ***			
Name: Foxwood house			
Memo: Foxwood house remodel			
Date: 15-Dec-17			
*** Order Manager ***			
P54321	2.00	4.49	8.98
		EACH	
Paint brush - 2 in			

When all order items are purchased, the original order is deleted.

When you complete an order purchase, the receipt includes the order information.

If the customer has completed the purchases from the order, but unsold items remain, you can manually delete the order.

1. In the **Invoice/Quote** module, click **Recall Transaction**.
2. Select **Quote – Order**, select the order that you want to delete, and then click **Delete**.



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Learn more

To learn more, see the following resources in our [Help Portal](#)

Knowledge Base:

- [About Order Manager and turning quotes into orders](#)

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



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Recording available at:

portal.paladinpos.com/webinars

