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WEBINARS

Improve your customer experience and increase revenues with our updated Delivery functionality!

Charles Owen

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Improve your customer experience and increase revenues with our updated Delivery functionality!

- Go to the Checkout tab for Schedule Delivery.
- Collect schedule delivery details after payment is processed.
- Schedule deliveries for stored quotes.
- Enter the delivery details in the payment wizard.
- Project information auto-fills the delivery address.
- Deliveries can be scheduled for a specific time window.
- Delivery management avoids time conflicts.
- Delivery details on invoices have been updated.
- Automatically attach an invoice to the customer’s delivery notification email.

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- View deliveries sorted by date and time in Mobile2Deliver.
- View scheduled deliveries in Excel.
- Select delivery configuration options in the Paladin Configuration window.

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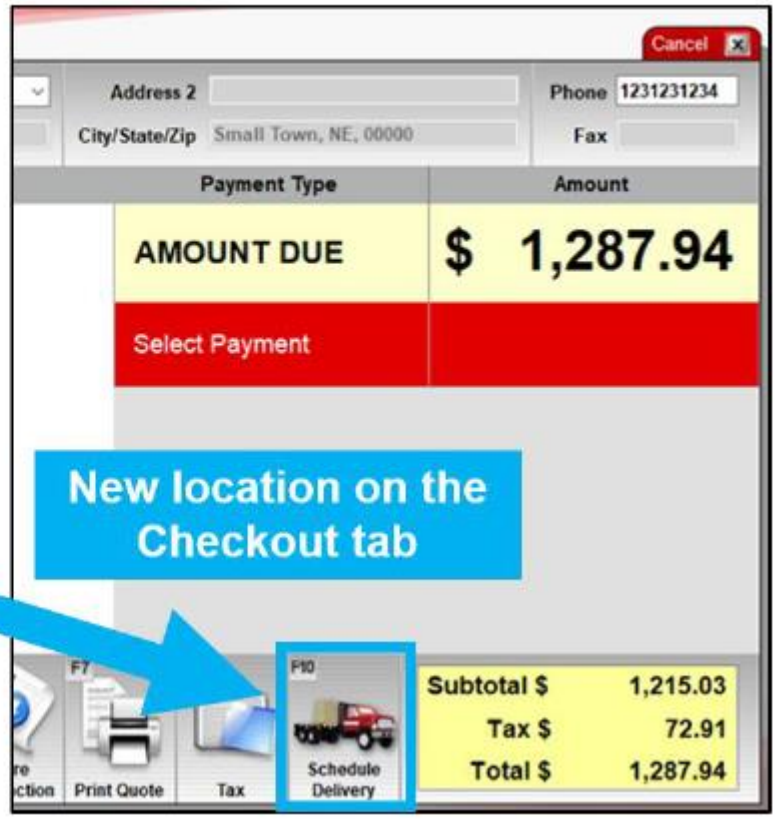
Go to the Checkout tab for Schedule Delivery.



To improve the workflow for customer purchases, we moved the **Schedule Delivery** feature.

- *Before*: In the **Invoice/Quote** tab, where items are added to the invoice.
- *Now*: In the **Checkout** tab, where the customer payment is processed.

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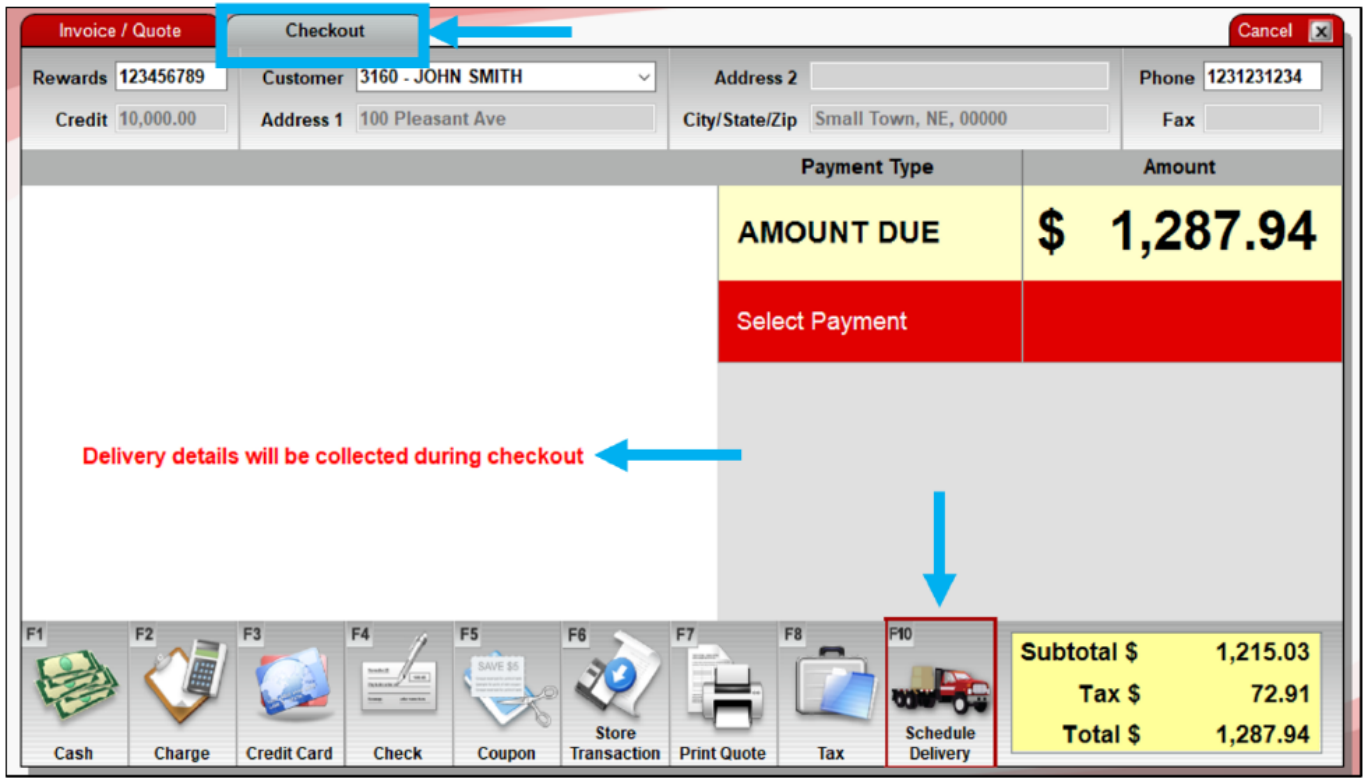
Collect schedule delivery details after payment is processed.



- Before you select a payment type on the **Checkout** tab, click **Schedule Delivery** or press F10 to initiate the delivery process.
- On the bottom ribbon, the **Schedule Delivery** feature will be outlined in red to show that you intend to schedule a delivery.
- *Before*: The delivery details were collected immediately after initiating the **Schedule Delivery** feature.
- *Now*: Delivery details are collected during the checkout process, which ensures that invoice items are paid for before the delivery is scheduled.

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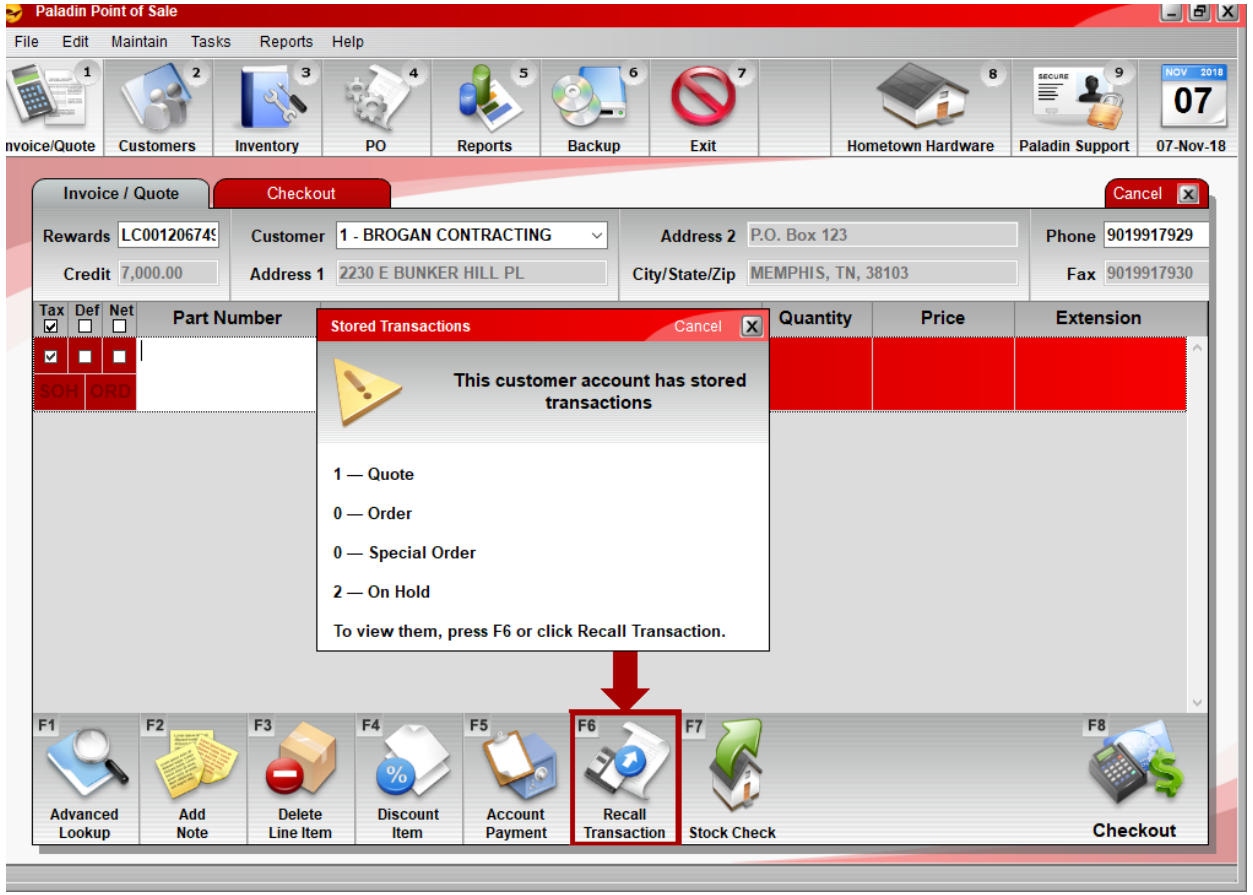
Schedule deliveries for stored quotes.



Now that Schedule Delivery is on the Checkout tab, you can click **Recall Transaction** to recall a quote, order, special order, or on hold item, and then schedule a delivery.

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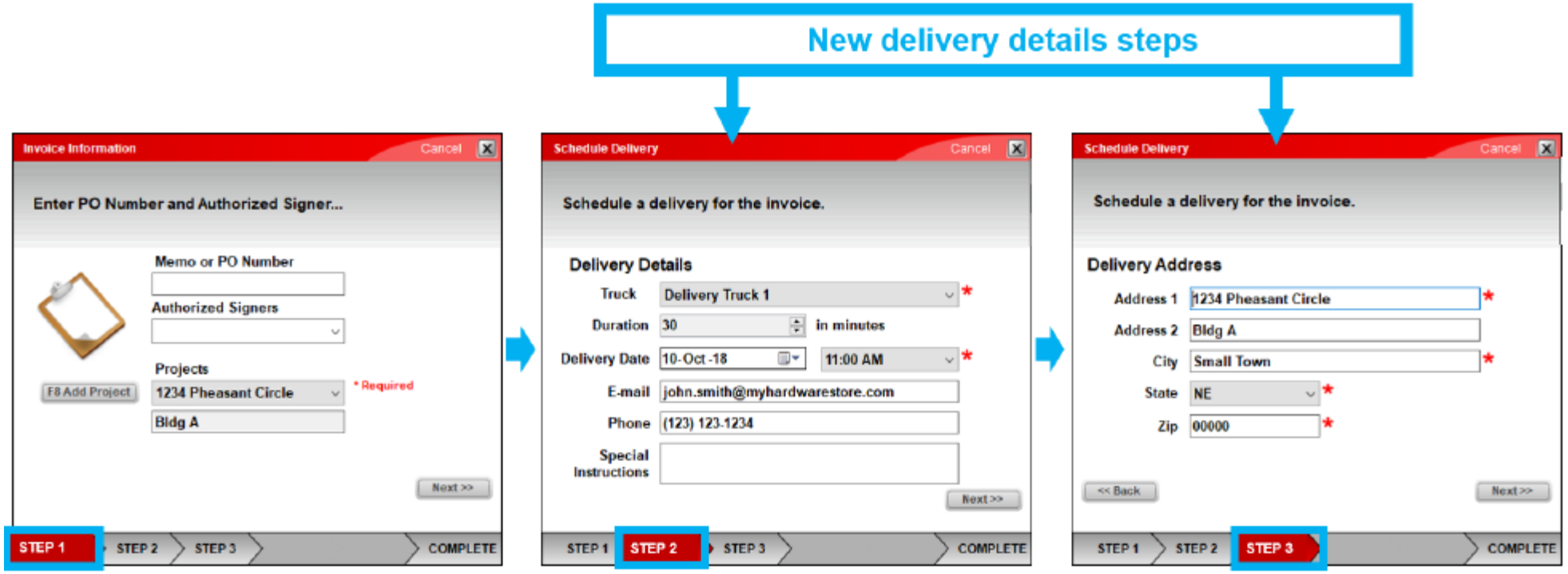
Enter the delivery details in the payment wizard.

After the payment is processed, the payment wizard collects the delivery details in two steps.



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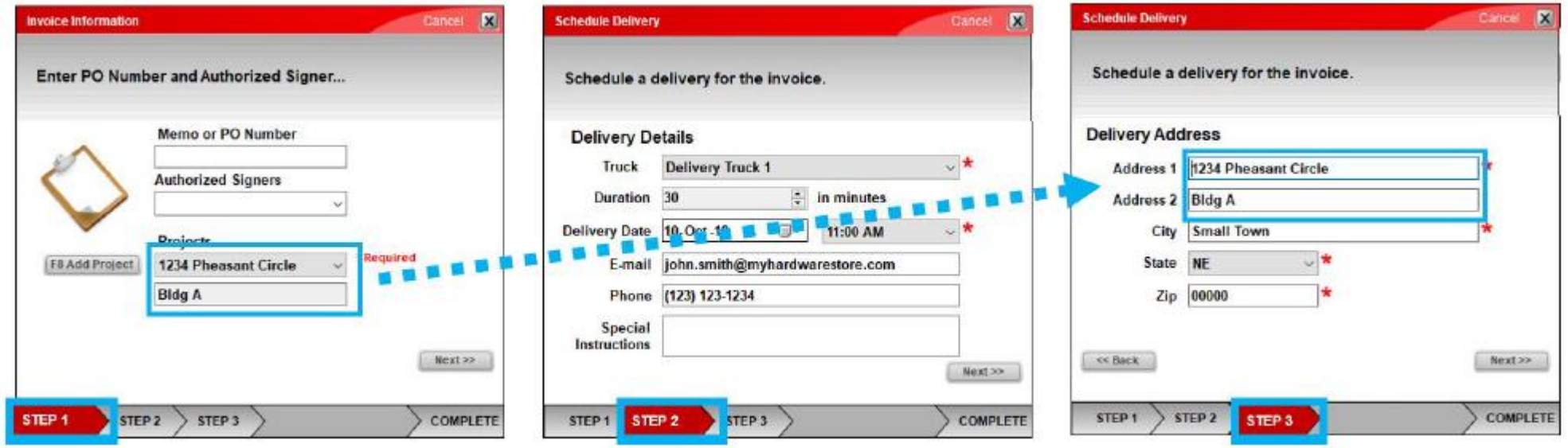
Project information auto-fills the delivery address.

- Project information in the **Invoice Information** window will automatically appear in the **Address 1** and **Address 2** boxes. **Note**: This applies only to charge and credit card purchases.
- City, state, and zip code information from the customer's account will automatically appear in the **City**, **State**, and **Zip** boxes.



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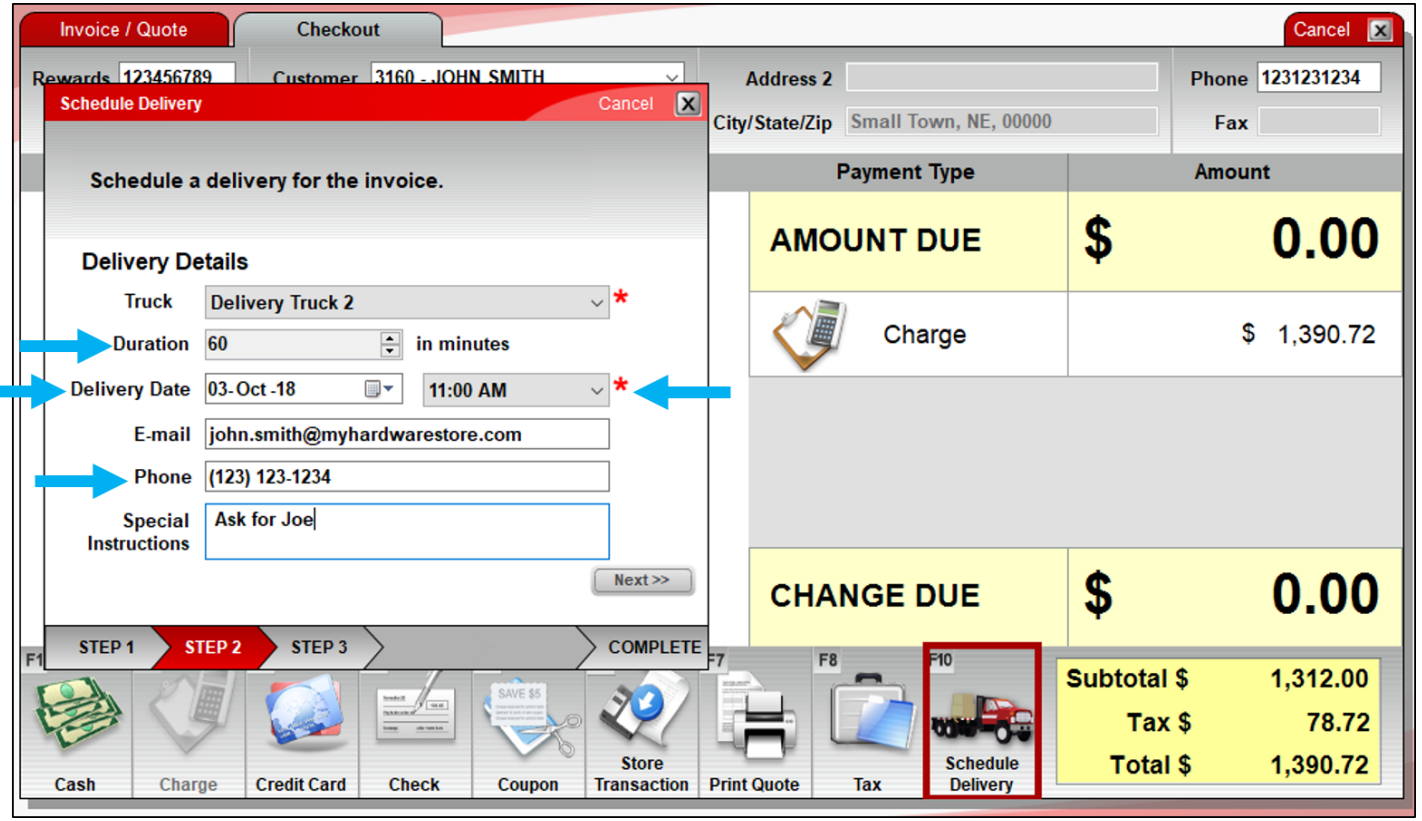
Deliveries can be scheduled for a specific time window.



In this example, a 60-minute delivery was scheduled for Delivery Truck 2 from 11:00 AM – 12 noon on 02-Oct-18.

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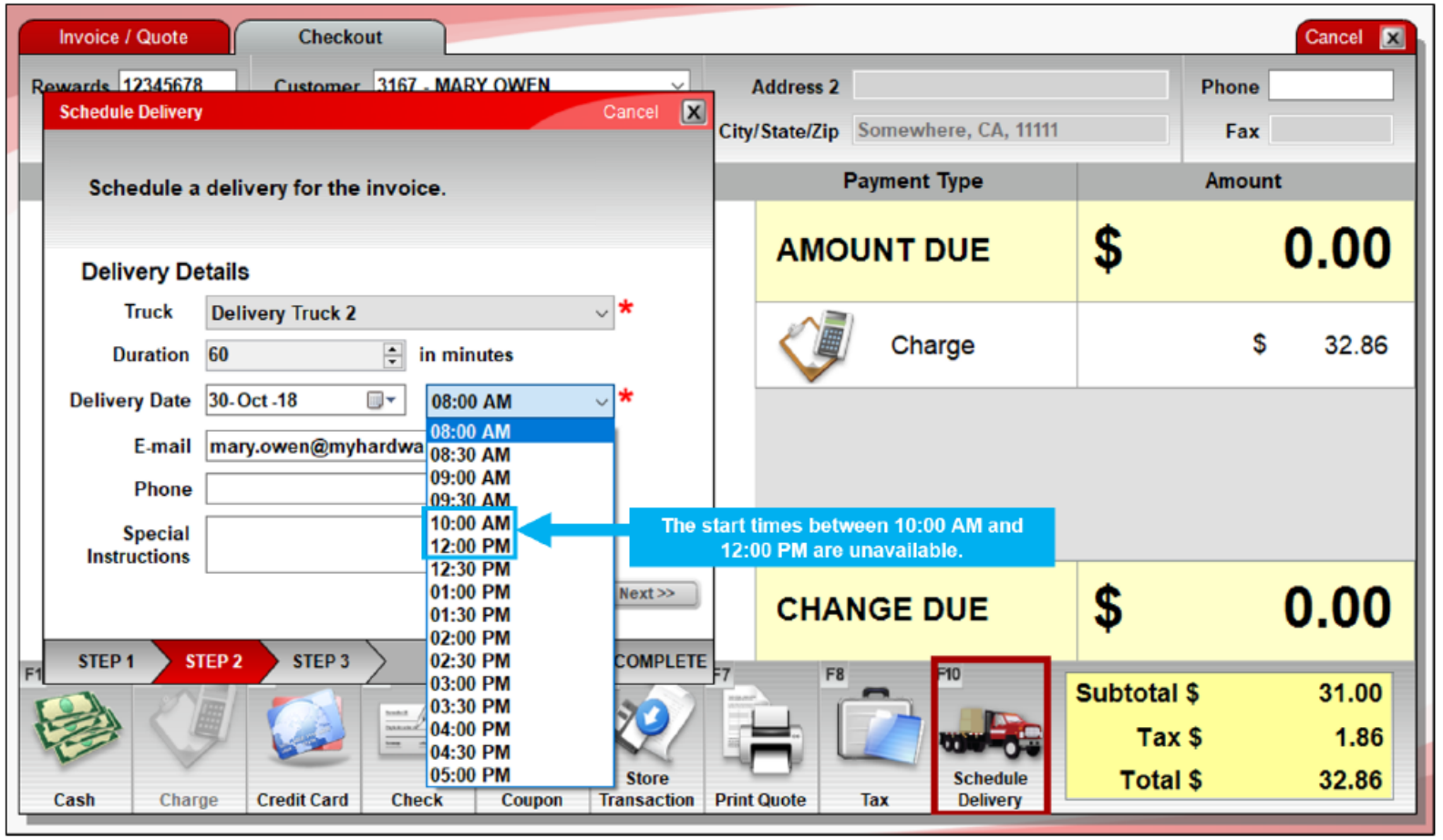
Delivery management avoids time conflicts.



If you try to schedule another 60-minute delivery for the same truck and date, the start times 10:30 AM, 11:00 AM, and 11:30 AM will not be available because they conflict with a previously-scheduled delivery.

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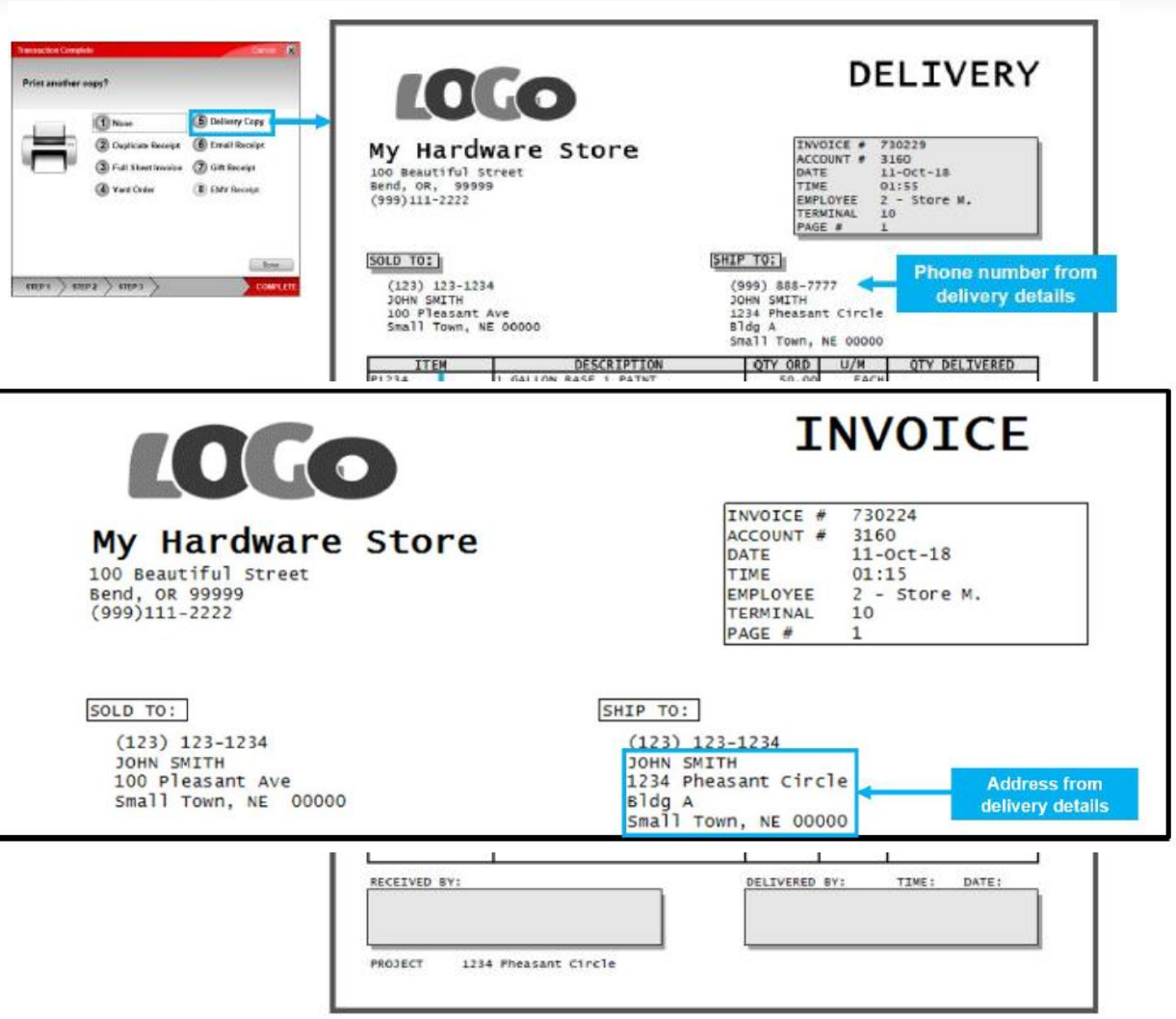

Delivery details on invoices have been updated.

- The SHIP TO address on the large form invoice shows the delivery address.
- The delivery invoice will include the phone number and the PO number that you entered.
- On all invoices, the delivery section has been condensed, so you can save paper when printing.

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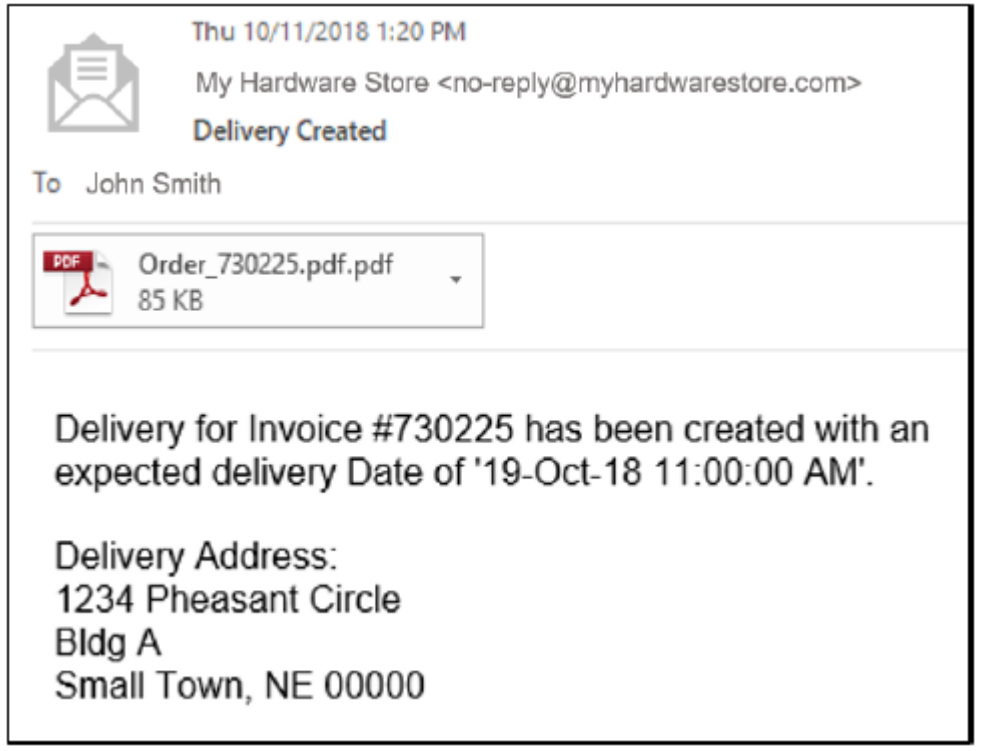
Automatically attach an invoice to the customer's delivery notification email.



When the delivery notification email is sent, an optional configuration setting will attach a PDF of the invoice.

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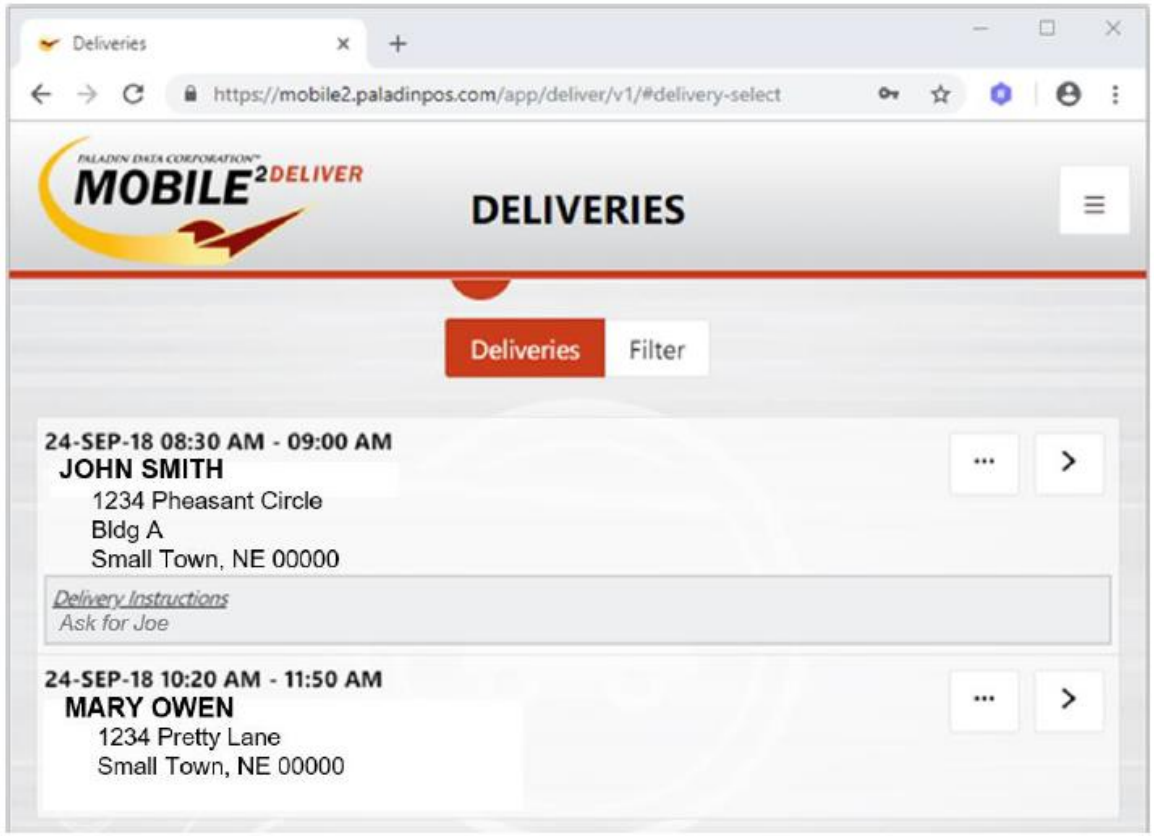
View deliveries sorted by date and time in Mobile2Deliver



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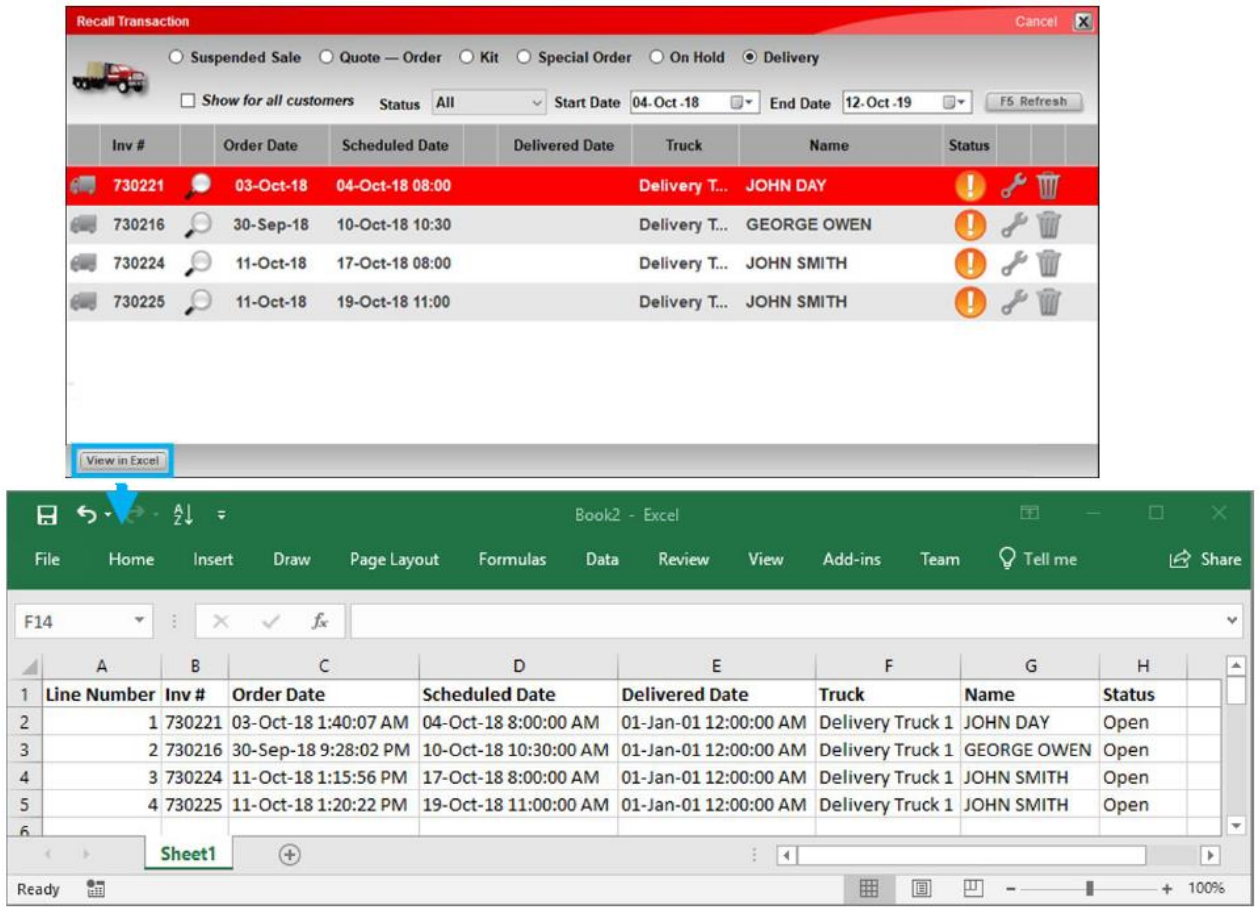
View scheduled deliveries in Excel.



In the **Recall Transaction** window, click **View in Excel** to view the list of scheduled deliveries in an Excel spreadsheet.

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Select delivery configuration options in the Paladin Configuration window.

Delivery Truck Required: Require the cashier to select a delivery truck.
Phone Number Required: Require the cashier to enter a phone number.
Attach Invoice to Delivery Emails: Attach the invoice to the customer's delivery email notification.
Delivery Hours: Set the range of delivery times.
Delivery Slot Interval: Choose from these values: 5, 10, 15, or 30 minutes
Delivery Truck **Name**(s): Assign names to your delivery trucks.

How to access the Schedule Delivery settings

1. On the **File** menu, click **Setup**.

2. In the **Paladin Configuration** window, click the **Delivery** tab.

3. In the **Delivery Options** and **Delivery Truck** panes, specify your preferred options.

4. Click **Save**, and then click **Close**.

Learn more

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

- Our delivery scheduling system just got a major upgrade

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

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portal.paladinpos.com/webinars

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