



*PALADIN DATA CORPORATION™*

# **WEBINARS**



**FREE ADVANCED TRAINING**



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

Charles Owen

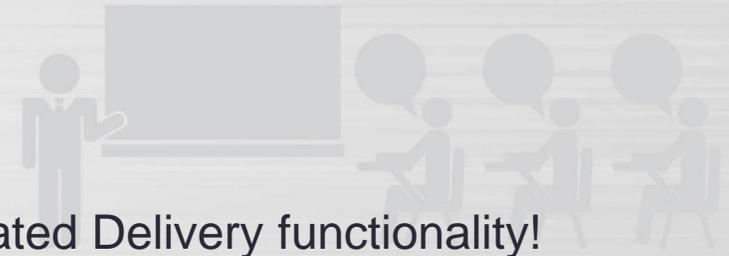




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Improve your customer experience and increase revenues with our updated Delivery functionality!



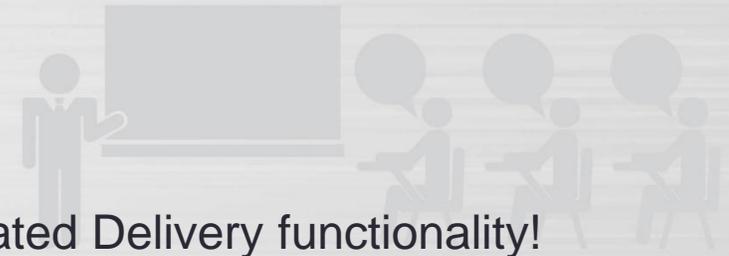
- Go to the Checkout tab for Schedule Delivery.
- Collect schedule delivery details after payment is processed.
- Schedule deliveries for stored quotes.
- Enter the delivery details in the payment wizard.
- Project information auto-fills the delivery address.
- Deliveries can be scheduled for a specific 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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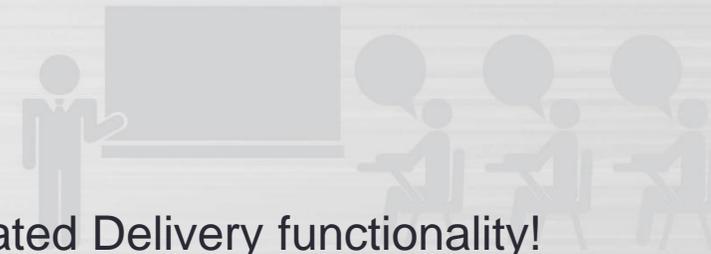
- View deliveries sorted by date and time in Mobile2Deliver.
- View scheduled deliveries in Excel.
- Select delivery configuration options in the Paladin Configuration window.



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## Go to the Checkout tab for Schedule Delivery.

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH
480	0		8	8.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	1 GALLON PAINT - BASE 1
-90	0		9	28.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART3	1 GALLON BASE 1 WHITE PAINT
70	0		10	26.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1234	HAMMER
707.78	150		11	22.89

Toolbar: F1 Advanced Lookup, F2 Add Note, F3 Delete Line Item, F4 Discount Item, F5 ~~Schedule Delivery~~, F6 Tax

Address 2: \_\_\_\_\_ Phone: 1231231234  
City/State/Zip: Small Town, NE, 00000 Fax: \_\_\_\_\_

Payment Type	Amount
AMOUNT DUE	\$ 1,287.94
Select Payment	

Subtotal \$ 1,215.03  
Tax \$ 72.91  
Total \$ 1,287.94

Toolbar: F7 Print Quote, F8 Tax, F9 Schedule Delivery

New location on the Checkout tab

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.

The screenshot shows a software interface for processing an invoice. At the top, there are two tabs: "Invoice / Quote" and "Checkout". The "Checkout" tab is selected and highlighted with a blue box and an arrow. Below the tabs, there are input fields for "Rewards" (123456789), "Customer" (3160 - JOHN SMITH), "Address 2", "Phone" (1231231234), "Credit" (10,000.00), "Address 1" (100 Pleasant Ave), "City/State/Zip" (Small Town, NE, 00000), and "Fax".

Payment Type	Amount
AMOUNT DUE	\$ 1,287.94
Select Payment	

Below the table, there is a red text box that says "Delivery details will be collected during checkout" with a blue arrow pointing to it. At the bottom of the interface, there is a ribbon with various icons and labels: "F1 Cash", "F2 Charge", "F3 Credit Card", "F4 Check", "F5 Coupon", "F6 Store Transaction", "F7 Print Quote", "F8 Tax", and "F10 Schedule Delivery". The "F10 Schedule Delivery" icon, which shows a red truck, is highlighted with a red box and a blue arrow pointing to it. To the right of the ribbon, there is a summary box with the following information:

Subtotal \$	1,215.03
Tax \$	72.91
Total \$	1,287.94

- 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.

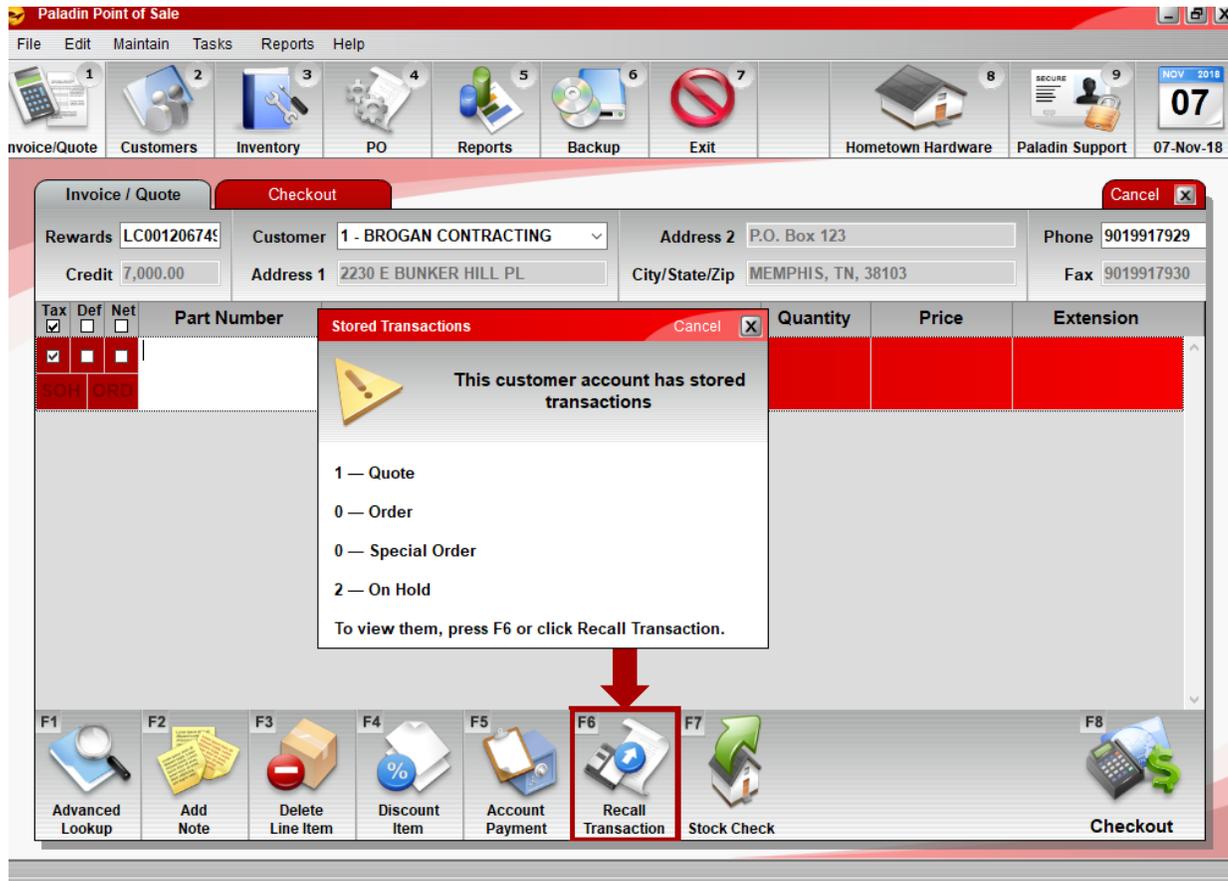


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## Schedule deliveries for stored quotes.

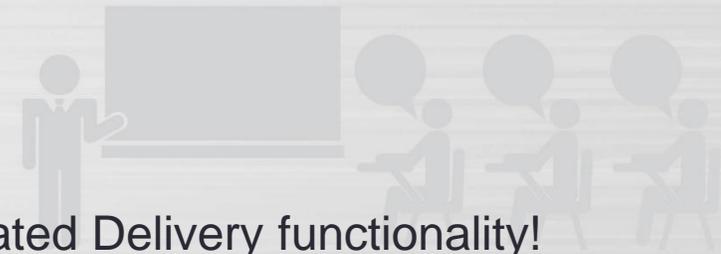


Now that Schedule Delivery is on the Checkout tab, you can click **Recall Transaction** to recall a quote, order, special order, or on hold item, and then schedule a delivery.



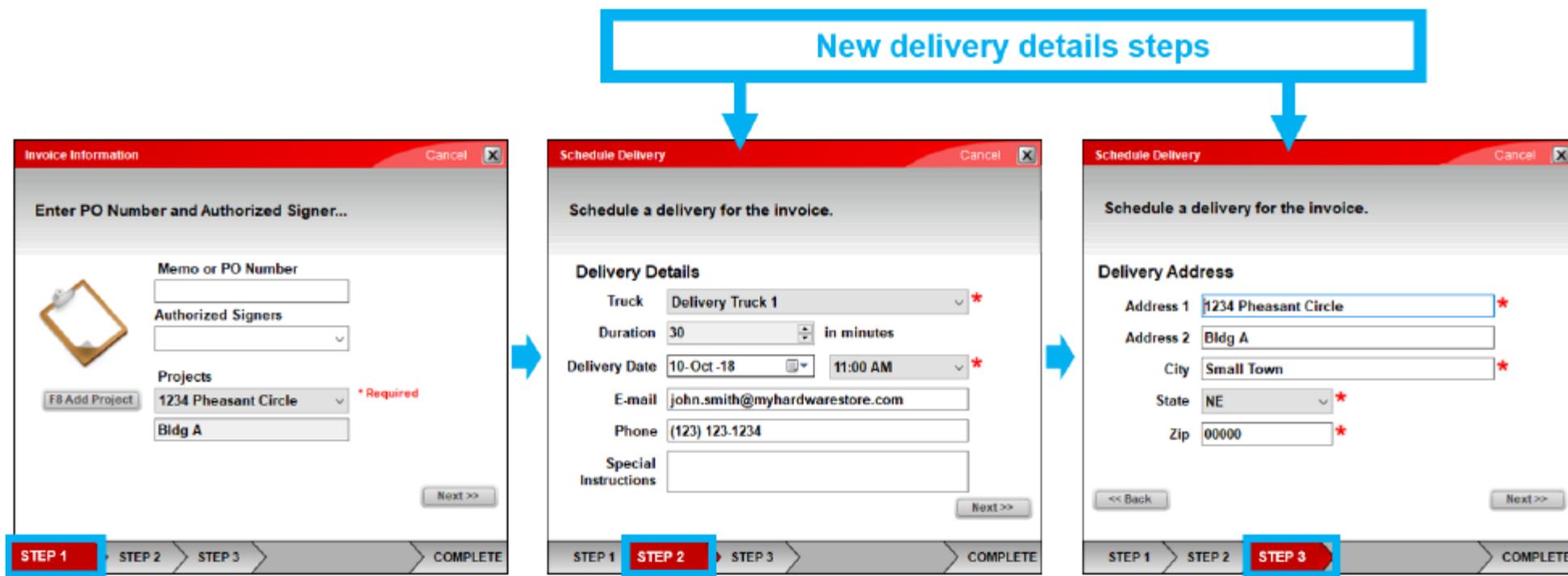
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Enter the delivery details in the payment wizard.

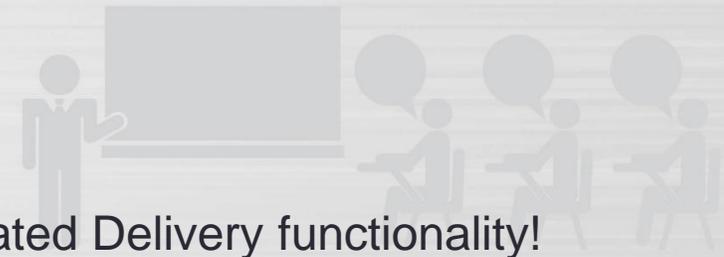
After the payment is processed, the payment wizard collects the delivery details in two steps.





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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.

The image displays three sequential screenshots of a software interface, illustrating the process of scheduling a delivery. A blue dashed arrow points from the 'Projects' dropdown in the first window to the 'Address 1' field in the third window.

**Step 1: Invoice Information**  
Title: Enter PO Number and Authorized Signer...  
Fields: Memo or PO Number, Authorized Signers, Projects (dropdown with '1234 Pheasant Circle' and 'Bldg A' selected).  
Buttons: FB Add Project, Next >>

**Step 2: Schedule Delivery**  
Title: Schedule a delivery for the invoice.  
Section: Delivery Details  
Fields: Truck (Delivery Truck 1), Duration (30 in minutes), Delivery Date (10 Oct 11 11:00 AM), E-mail (john.smith@myhardwarestore.com), Phone ((123) 123-1234), Special Instructions.  
Buttons: Next >>

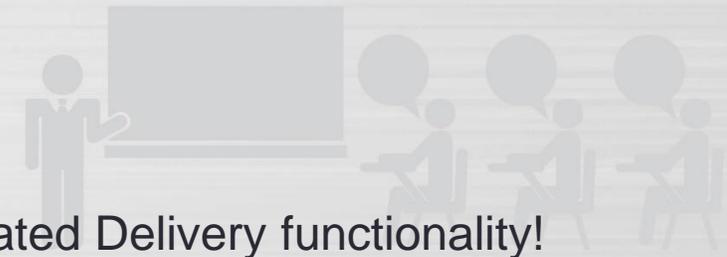
**Step 3: Schedule Delivery**  
Title: Schedule a delivery for the invoice.  
Section: Delivery Address  
Fields: Address 1 (1234 Pheasant Circle), Address 2 (Bldg A), City (Small Town), State (NE), Zip (00000).  
Buttons: << Back, Next >>



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Deliveries can be scheduled for a specific time window.

**Schedule Delivery**

Schedule a delivery for the invoice.

**Delivery Details**

Truck: Delivery Truck 2 \*

Duration: 60 in minutes

Delivery Date: 03-Oct-18 11:00 AM \*

E-mail: john.smith@myhardwarestore.com

Phone: (123) 123-1234

Special Instructions: Ask for Joe

Next >>

Payment Type	Amount
<b>AMOUNT DUE</b>	<b>\$ 0.00</b>
Charge	\$ 1,390.72
<b>CHANGE DUE</b>	<b>\$ 0.00</b>

Subtotal \$ 1,312.00  
Tax \$ 78.72  
Total \$ 1,390.72

STEP 1 **STEP 2** STEP 3 COMPLETE

Cash Charge Credit Card Check Coupon Store Transaction Print Quote Tax **Schedule Delivery**

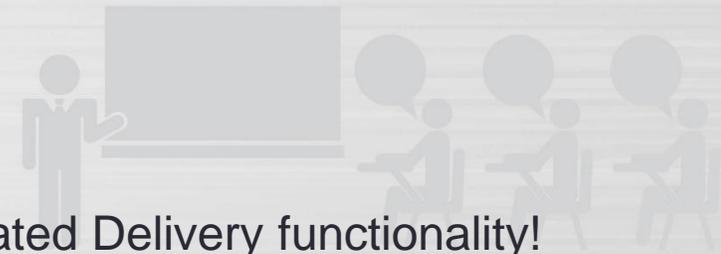
In this example, a 60-minute delivery was scheduled for Delivery Truck 2 from 11:00 AM – 12 noon on 02-Oct-18.



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## Delivery management avoids time conflicts.

**Schedule Delivery**

Schedule a delivery for the invoice.

**Delivery Details**

Truck: Delivery Truck 2 \*

Duration: 60 in minutes

Delivery Date: 30-Oct-18

E-mail: mary.owen@myhardwa

Phone:

Special Instructions:

Start Times: 08:00 AM, 08:30 AM, 09:00 AM, 09:30 AM, 10:00 AM, 12:00 PM, 12:30 PM, 01:00 PM, 01:30 PM, 02:00 PM, 02:30 PM, 03:00 PM, 03:30 PM, 04:00 PM, 04:30 PM, 05:00 PM

**Payment Table:**

Payment Type	Amount
AMOUNT DUE	\$ 0.00
Charge	\$ 32.86
CHANGE DUE	\$ 0.00

**Summary:**

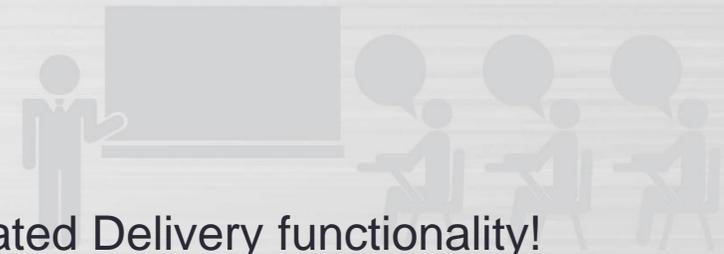
Subtotal \$	31.00
Tax \$	1.86
Total \$	32.86

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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**Transaction Complete**

Print another copy?

1 New    5 Delivery Copy  
 2 Duplicate Receipt    6 Email Receipt  
 3 Full Sheet Invoice    7 QR Receipt  
 4 Void Order    8 CMR Receipt

**DELIVERY**

**LOGO**  
**My Hardware Store**  
 100 Beautiful Street  
 Bend, OR, 99999  
 (999)111-2222

INVOICE # 730229  
 ACCOUNT # 3160  
 DATE 11-OCT-18  
 TIME 01:55  
 EMPLOYEE 2 - Store M.  
 TERMINAL 10  
 PAGE # 1

**SOLD TO:**  
 (123) 123-1234  
 JOHN SMITH  
 100 Pleasant Ave  
 Small Town, NE 00000

**SHIP TO:**  
 (999) 888-7777  
 JOHN SMITH  
 1234 Pheasant Circle  
 Bldg A  
 Small Town, NE 00000

Phone number from delivery details

ITEM	DESCRIPTION	QTY ORD	U/M	QTY DELIVERED
01000	1 GALLON RACE 1 PATNT	10.000	EACH	

## 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.

**LOGO**  
**My Hardware Store**  
 100 Beautiful Street  
 Bend, OR 99999  
 (999)111-2222

INVOICE # 730224  
 ACCOUNT # 3160  
 DATE 11-Oct-18  
 TIME 01:15  
 EMPLOYEE 2 - Store M.  
 TERMINAL 10  
 PAGE # 1

**SOLD TO:**  
 (123) 123-1234  
 JOHN SMITH  
 100 Pleasant Ave  
 Small Town, NE 00000

**SHIP TO:**  
 (123) 123-1234  
 JOHN SMITH  
 1234 Pheasant Circle  
 Bldg A  
 Small Town, NE 00000

Address from delivery details

RECEIVED BY: \_\_\_\_\_ DELIVERED BY: \_\_\_\_\_ TIME: \_\_\_\_\_ DATE: \_\_\_\_\_

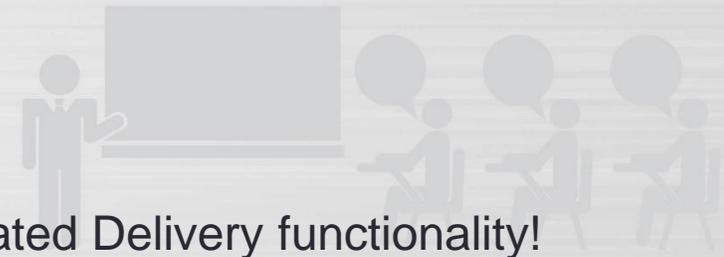
PROJECT 1234 Pheasant Circle



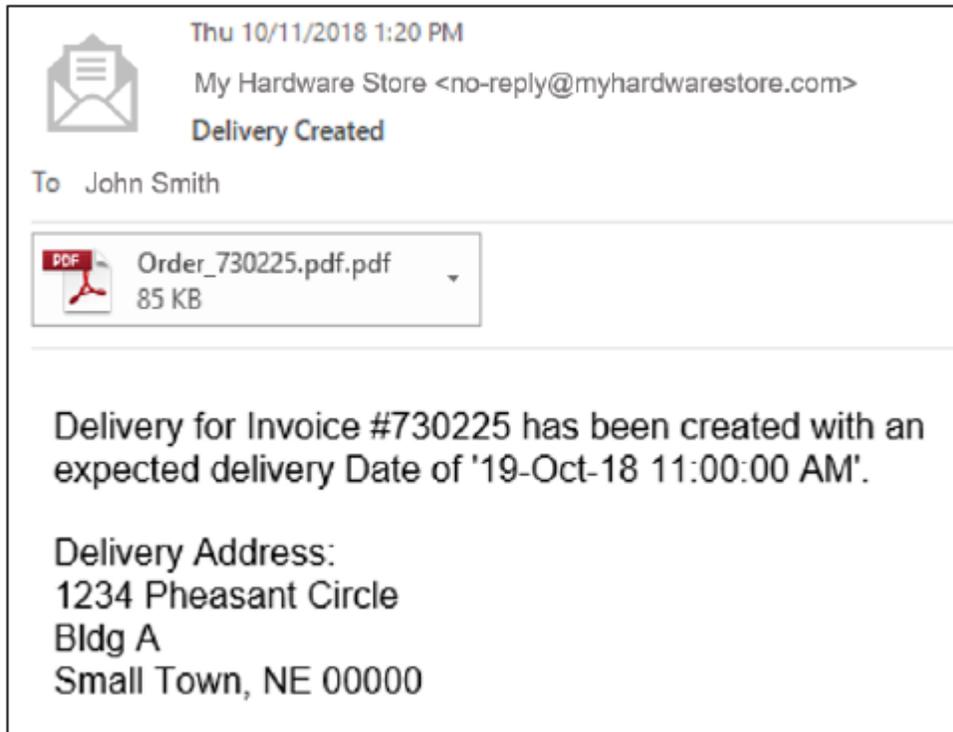
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Automatically attach an invoice to the customer's delivery notification email.



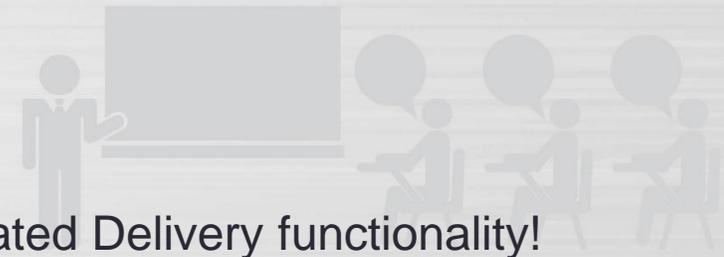
When the delivery notification email is sent, an optional configuration setting will attach a PDF of the invoice.



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## View deliveries sorted by date and time in Mobile2Deliver

The screenshot shows a web browser window with the URL <https://mobile2.paladinpos.com/app/deliver/v1/#delivery-select>. The page header includes the logo for PALADIN DATA CORPORATION™ MOBILE<sup>2</sup>DELIVER and the title DELIVERIES. Below the header, there are two tabs: 'Deliveries' (selected) and 'Filter'. The main content area displays a list of deliveries sorted by date and time. The first delivery is for 24-SEP-18 from 08:30 AM to 09:00 AM, assigned to JOHN SMITH, with the address 1234 Pheasant Circle, Bldg A, Small Town, NE 00000. The delivery instructions are 'Ask for Joe'. The second delivery is for 24-SEP-18 from 10:20 AM to 11:50 AM, assigned to MARY OWEN, with the address 1234 Pretty Lane, Small Town, NE 00000.

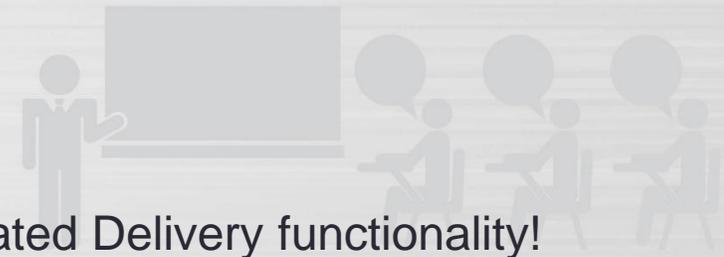
Date and Time	Delivery Name	Address	Delivery Instructions
24-SEP-18 08:30 AM - 09:00 AM	JOHN SMITH	1234 Pheasant Circle Bldg A Small Town, NE 00000	Ask for Joe
24-SEP-18 10:20 AM - 11:50 AM	MARY OWEN	1234 Pretty Lane Small Town, NE 00000	



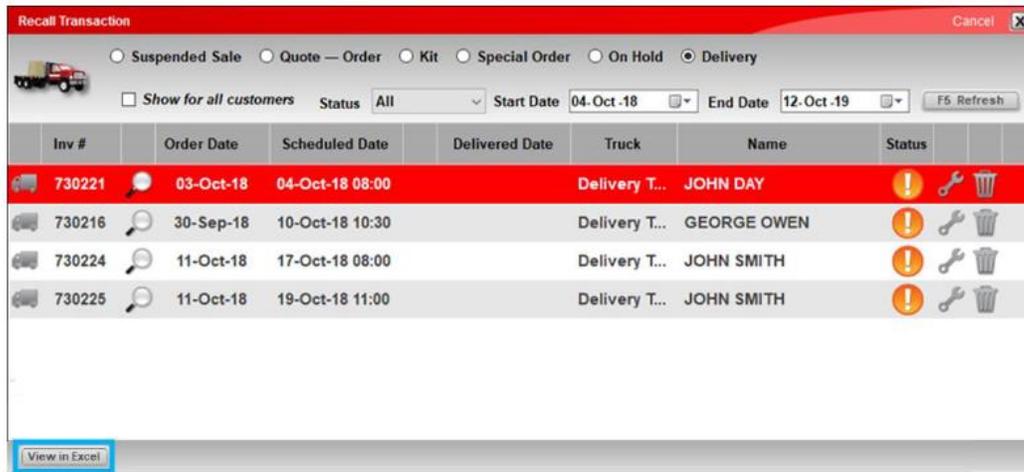
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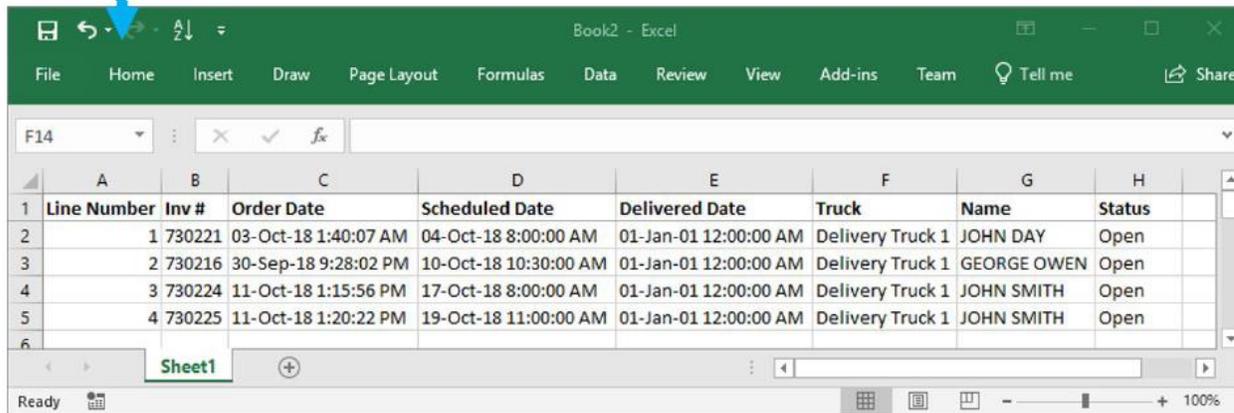
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## View scheduled deliveries in Excel.



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

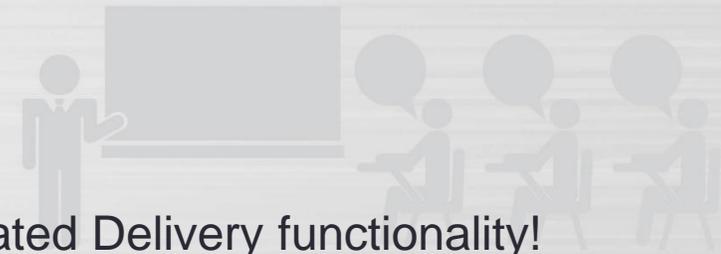




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## Select delivery configuration options in the Paladin Configuration window.

**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

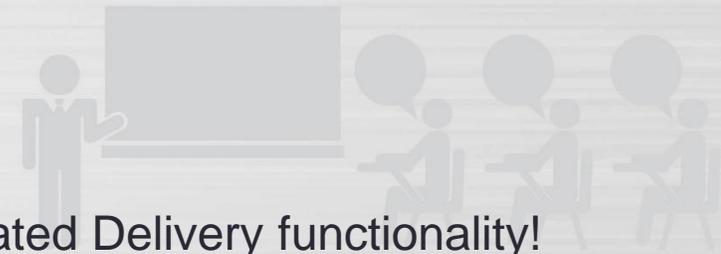
1. On the **File** menu, click **Setup**.
2. In the **Paladin Configuration** window, click the **Delivery** tab.
3. In the **Delivery Options** and **Delivery Truck** panes, specify your preferred options.
4. Click **Save**, and then click **Close**.



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## 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](http://portal.paladinpos.com/webinars).



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