



PALADIN DATA CORPORATION™

WEBINARS



FREE ADVANCED TRAINING



Take Paladin with you on the go with Mobile2Checkout

Charles Owen





PALADIN DATA CORPORATION™

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Take Paladin with you on the go with Mobile2Checkout



- Mobile2Checkout™ at a glance
- Advantages of Mobile2Checkout™
- Accessing the Mobile2Checkout™ app
- Reviewing Mobile2Checkout™ features
- How to signup for the service
- Learn more



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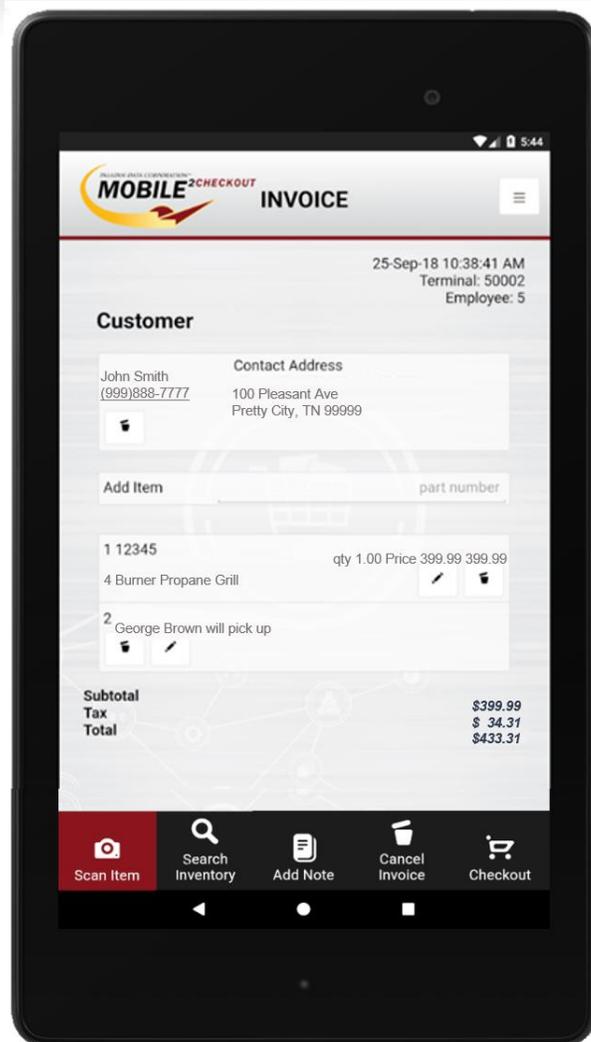
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Take Paladin with you on the go with Mobile2Checkout



Mobile2Checkout™ at a glance

- Checkout items in your store from anywhere, anytime, and in real-time.
- Honor most forms of payment, including credit cards.
- Build & store quotes to sell from your store at a later time.
- Use virtually any Android tablet that is current.





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Advantages of Mobile2Checkout™



- It's included in your monthly Paladin subscription.
- It's basically FREE, with exception of the tablet itself and optional monthly mobile service.
- It can run on WIFI and/or a mobile connection.
- Use as a line-buster to reduce and expedite backed up customer lines.



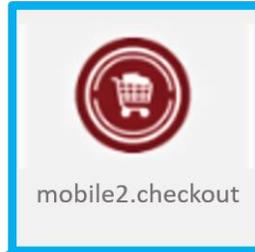
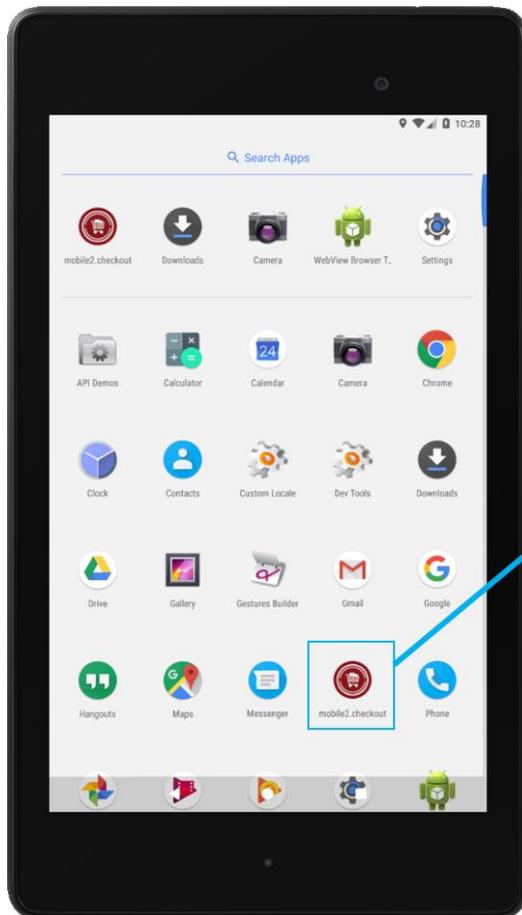
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Accessing the Mobile2Checkout™ app



- Paladin Support will setup the Mobile2Checkout app on your device.
- To open the Mobile2Checkout app on your Android device, tap the icon.



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Accessing the Mobile2Checkout™ app



- A message will appear briefly to let you know that the app has connected to your Paladin Point of Sale system.
- In the **Company** and **Code** boxes, enter the Mobile2Checkout app credentials provided by Paladin Support.

Note: In many cases, these credentials will be filled in by the app automatically.



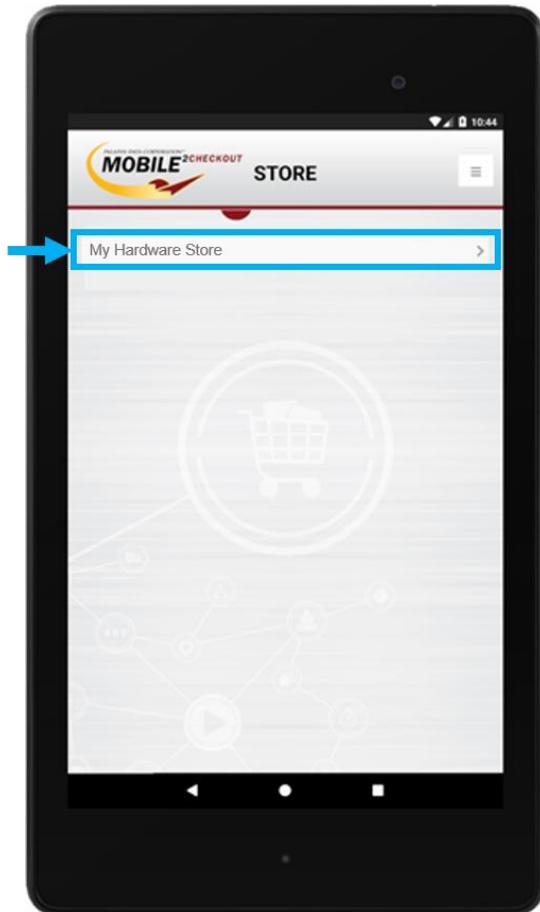
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Accessing the Mobile2Checkout™ app



- Tap your store.
- If your store has multiple locations, tap the appropriate store for the sale.



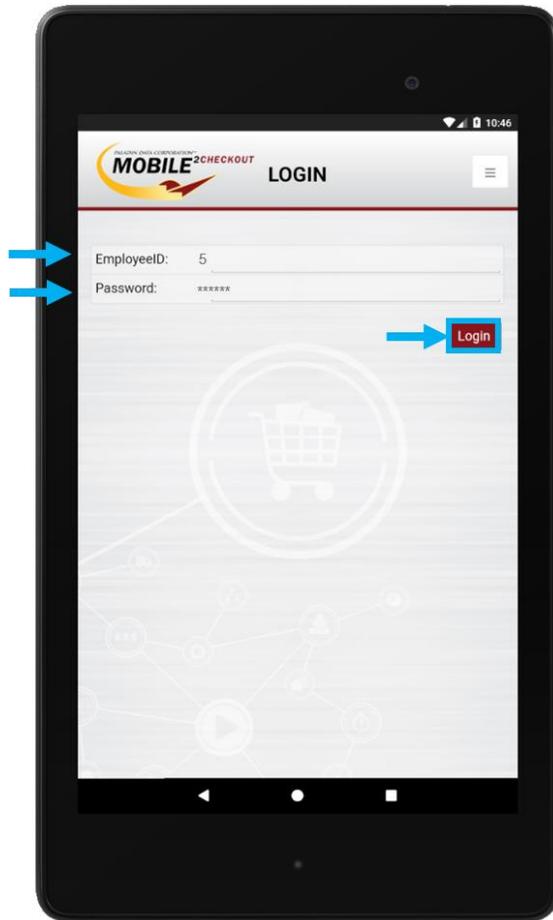
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Accessing the Mobile2Checkout™ app



- Enter your **Employee ID** and **Password**, and then tap **Login**.



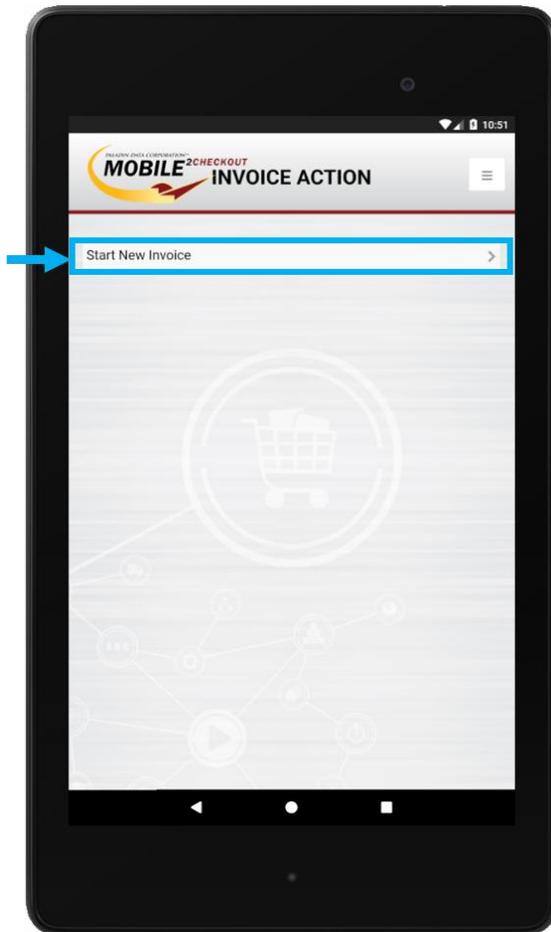
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Accessing the Mobile2Checkout™ app



- Tap **Start New Invoice** to open the **INVOICE** screen.



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Reviewing Mobile2Checkout™ features

- Search your customer database & associate customers with an invoice
- Scan items into the invoice
- Search the stores inventory and add items to the invoice
- Add items to the invoice manually
- Modify an invoice item's quantity and price
- Add invoice notes
- Straightforward checkout process
- Accept multiple forms of payment
- Email the receipt
- Process item returns
- Saving a transaction for later processing in Paladin Point of Sale
- Recall Mobile2Checkout™ invoices



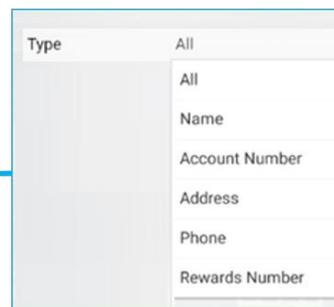
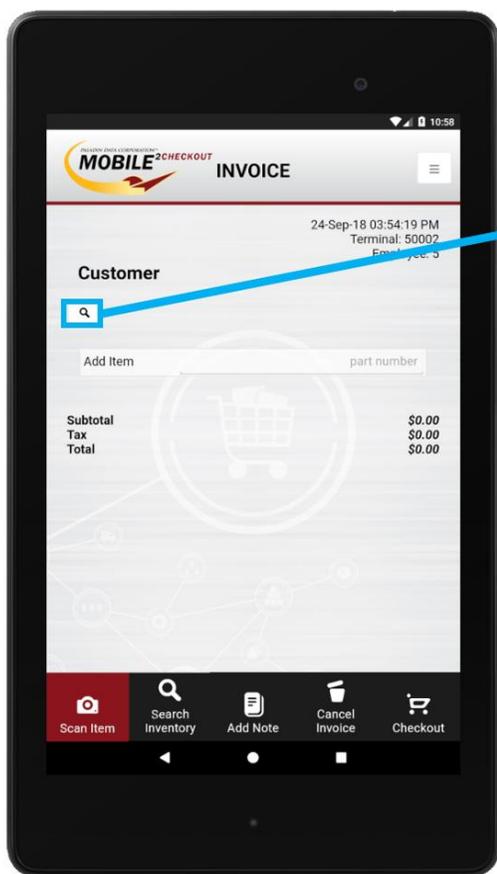
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Search your customer database & associate customers with an invoice



- To add a customer to the invoice, tap the **Customer** magnifying glass, and search for the customer. Tap **Type** to select a search option.

***Tip** If this search feels familiar, it is. We incorporated the power of our Paladin Point of Sale Advanced Lookup search feature—including its multiple search options—into our Mobile2Checkout™ app.*



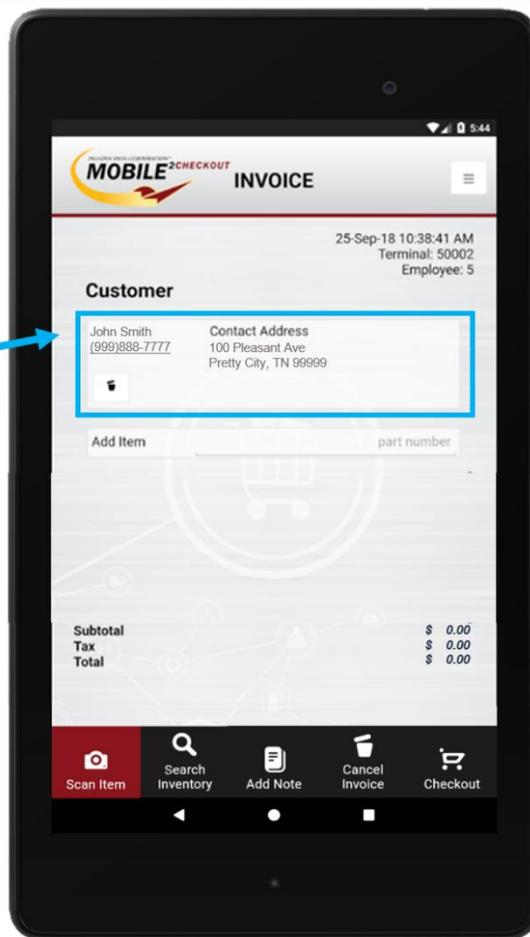
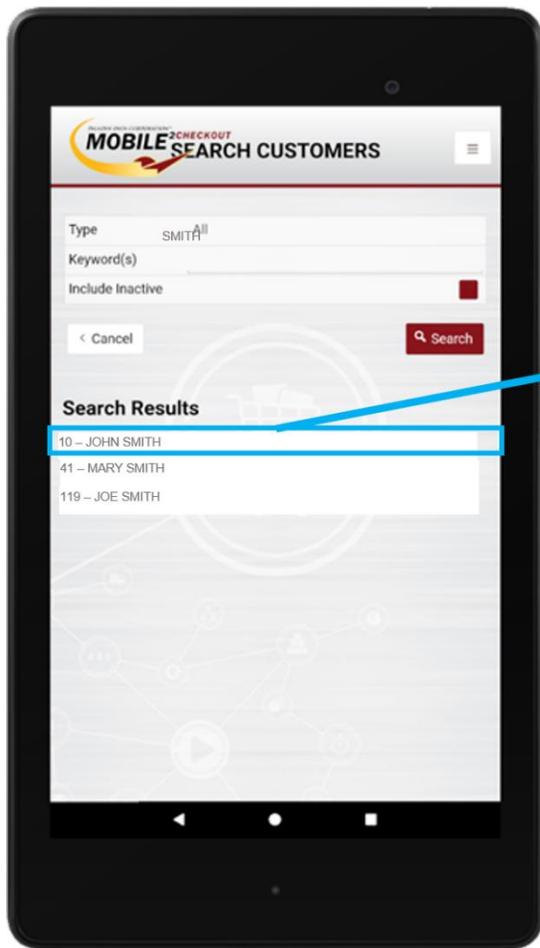
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Search your customer database & associate customers with an invoice



- Tap any search result to add the customer to the invoice.



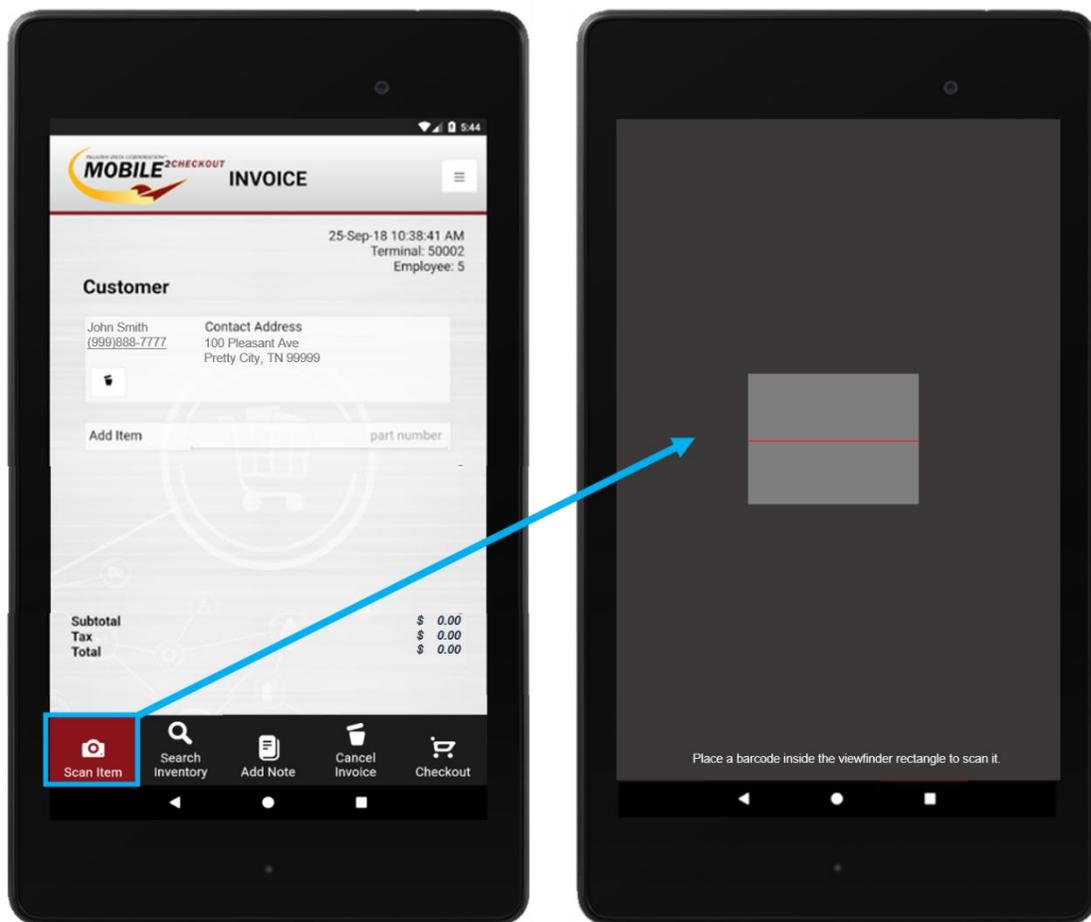
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Scan items into the invoice



- You can add items to the invoice in multiple ways:
- Tap **Scan Item**, and then scan the item's barcode with the camera on your device.

Note: Barcode scanner accessories for Android tablets can also be used to scan and add items to the invoice.



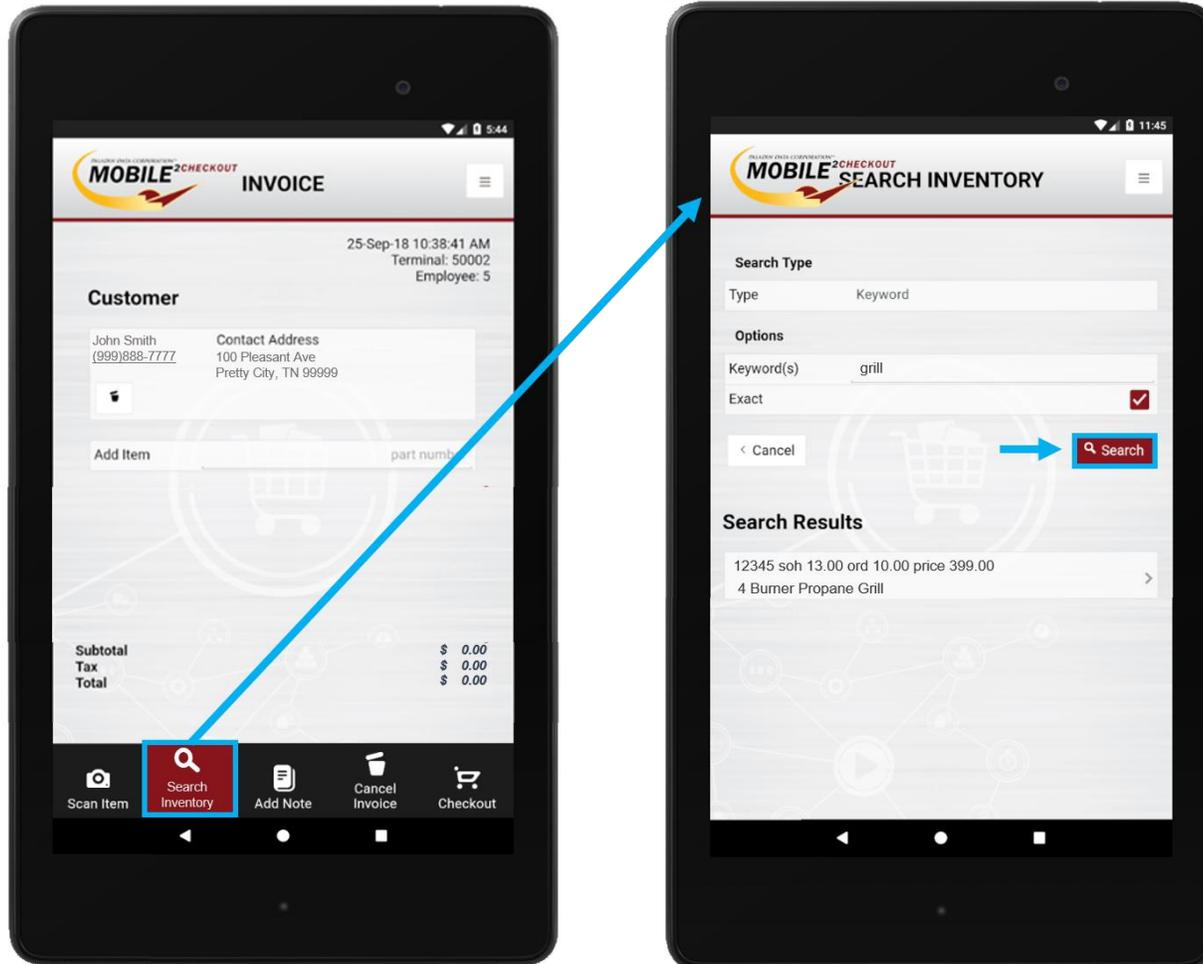
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Search the store's inventory and add items to the invoice



- Tap **Search Inventory**, and search for the item by name or part number. To add a search result to the invoice, tap it.



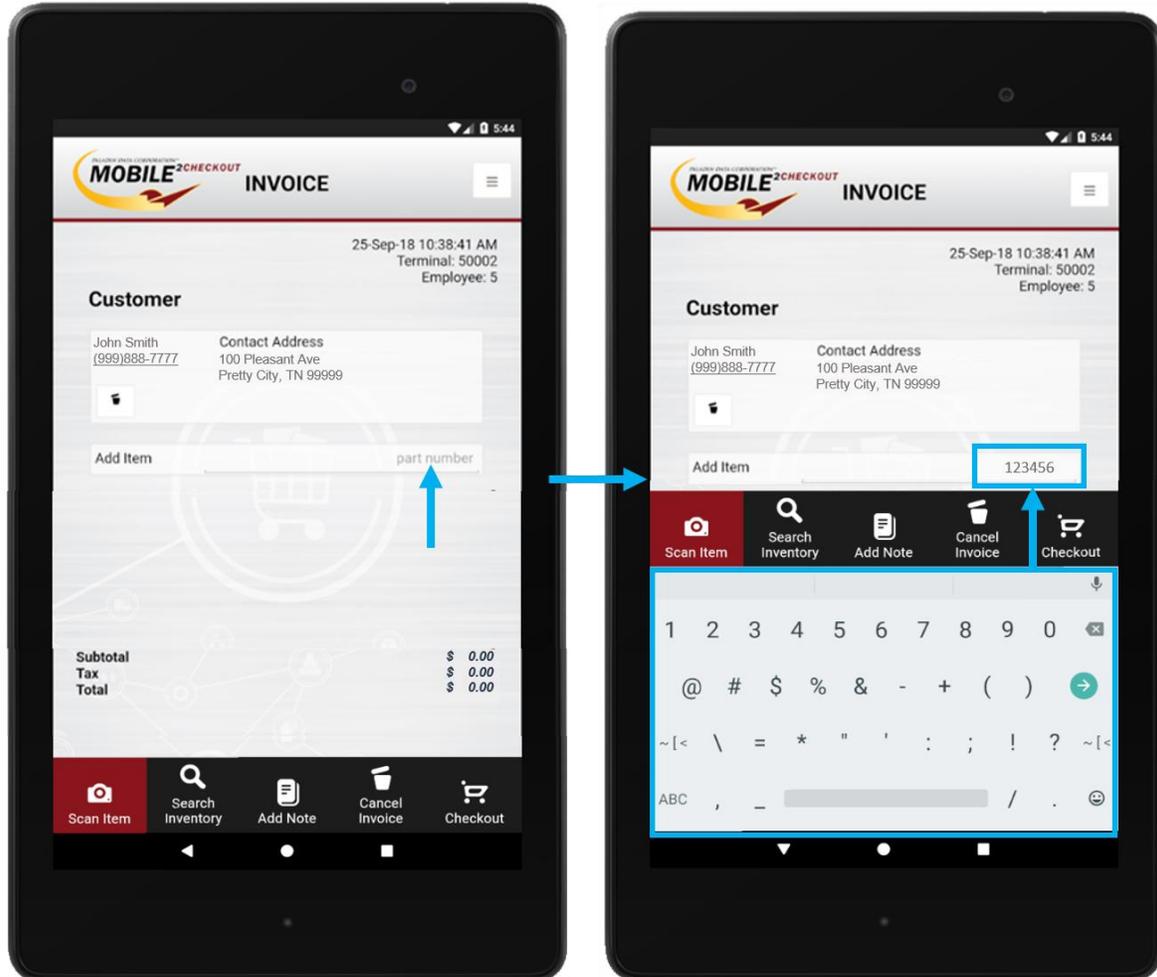
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Add items to the invoice manually



- Enter the part number in the **Add Item** box.



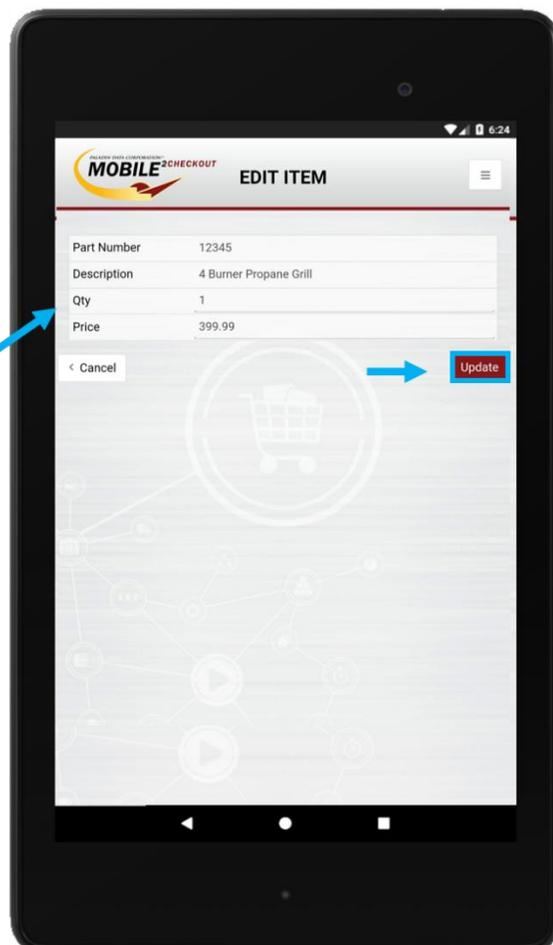
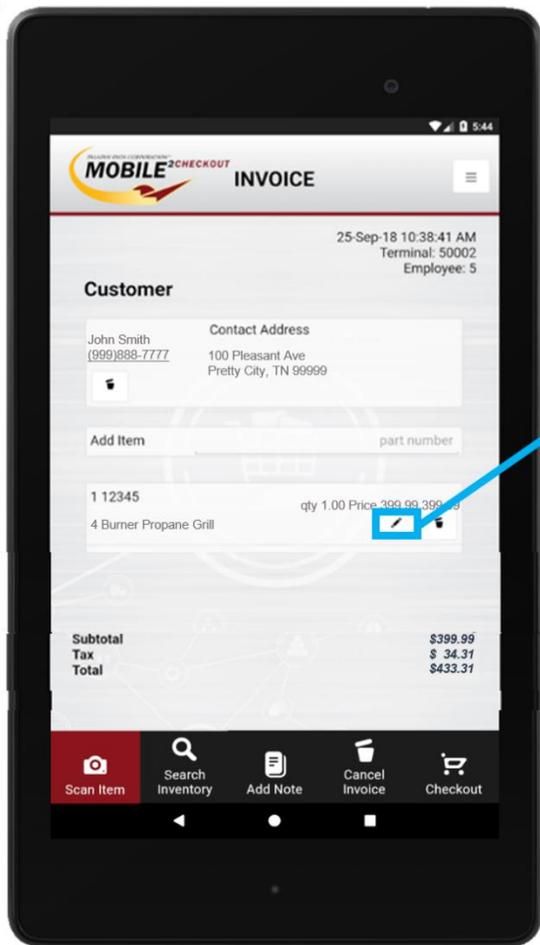
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Modify an invoice item's quantity and price



- To change the quantity or price after you add an invoice item, tap the pencil icon.



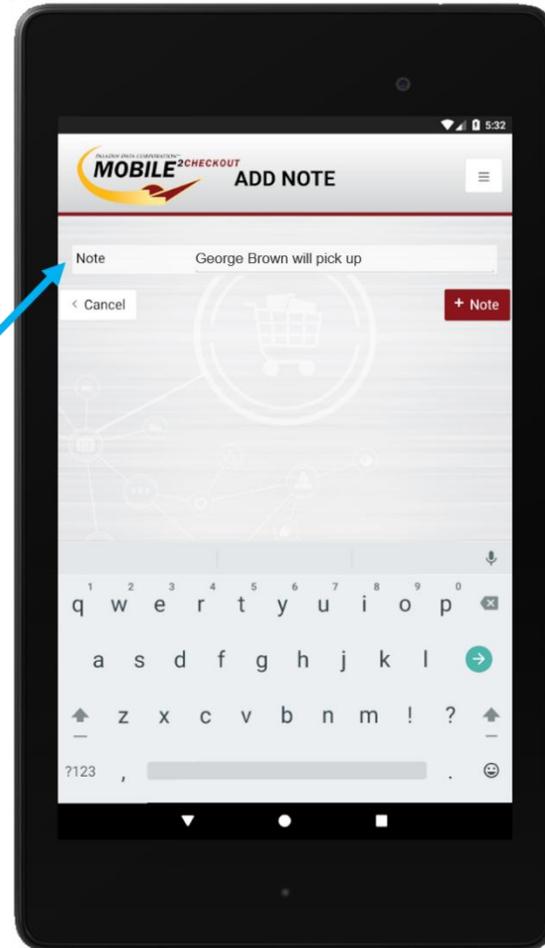
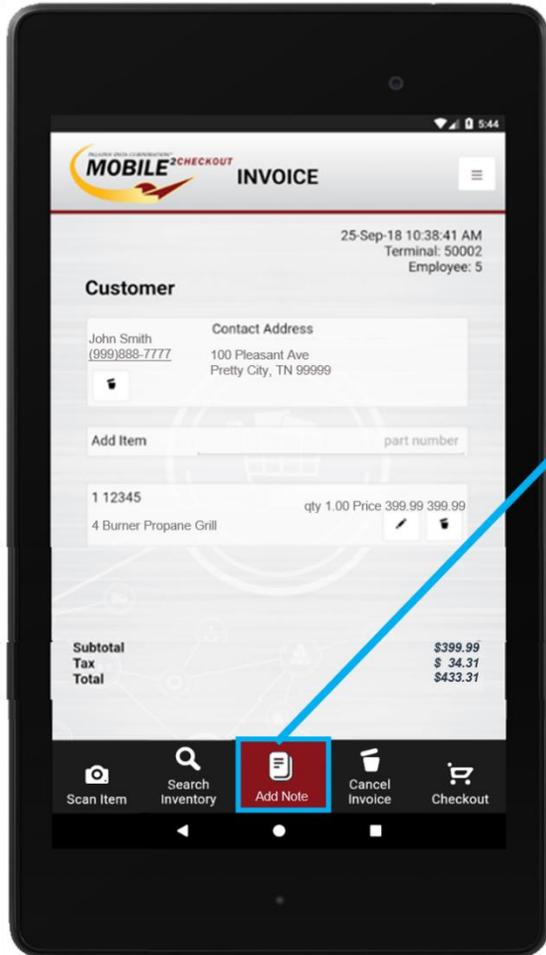
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Add invoice notes



- To insert a note on the invoice, tap **Add Note**, and then enter the note text.



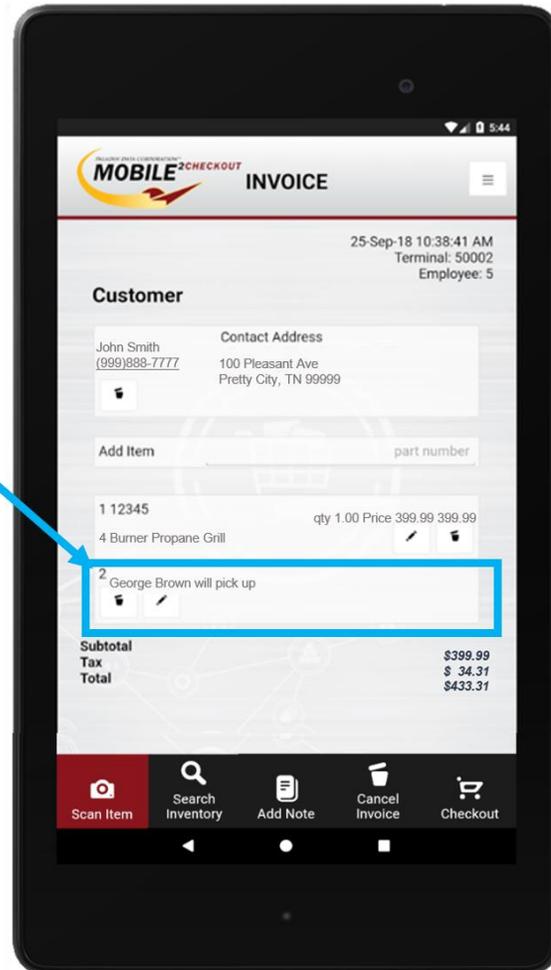
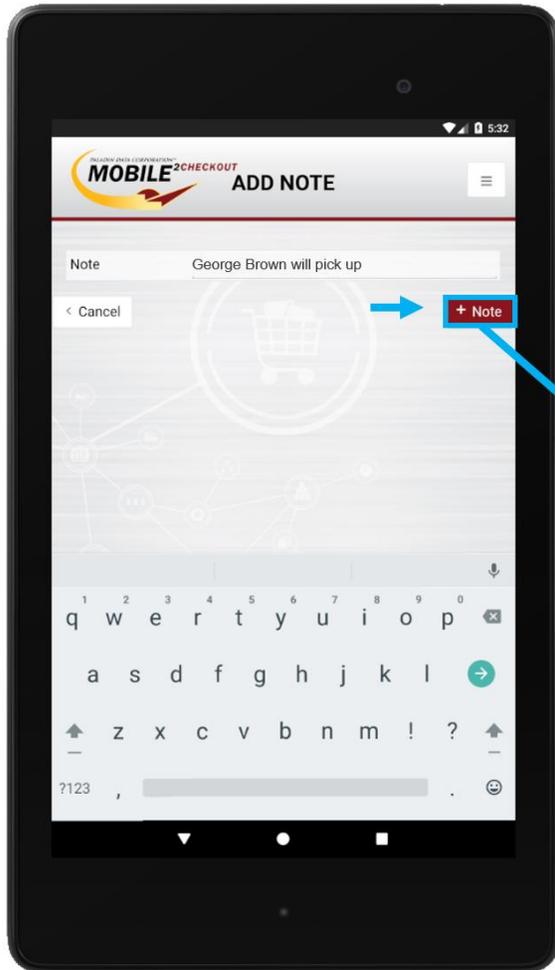
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Add invoice notes



- Tap **Note** to add the note line item to the invoice.



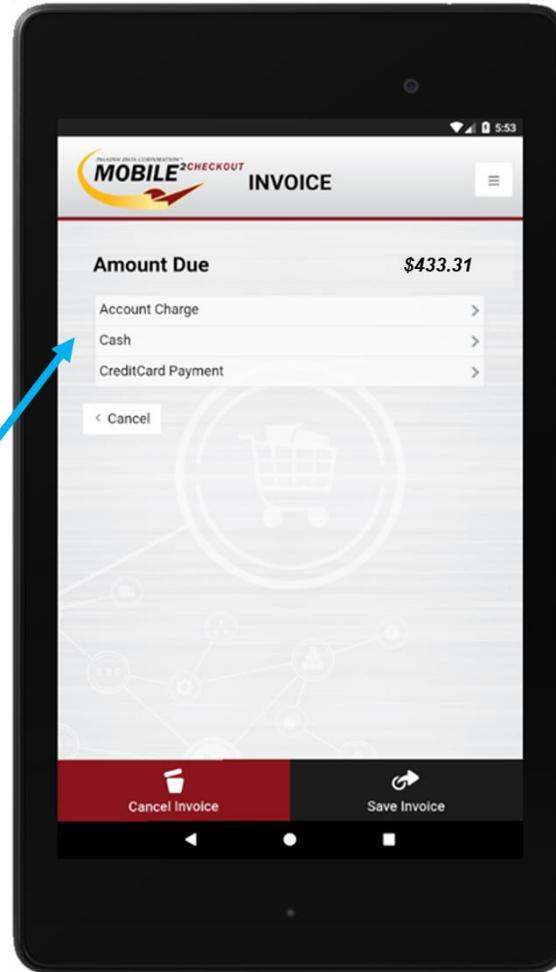
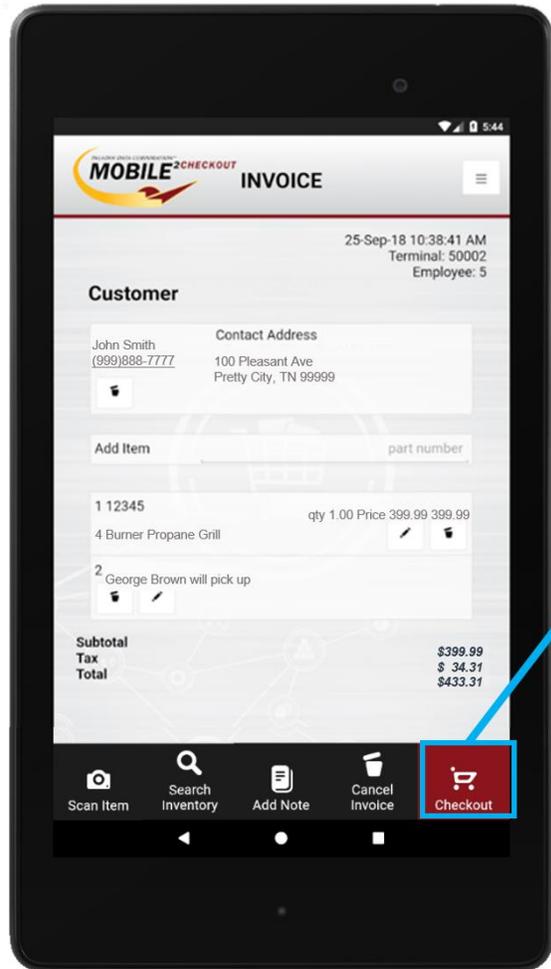
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Straightforward checkout process



- When you are ready to collect payment, tap **Checkout**, and then select a payment option.



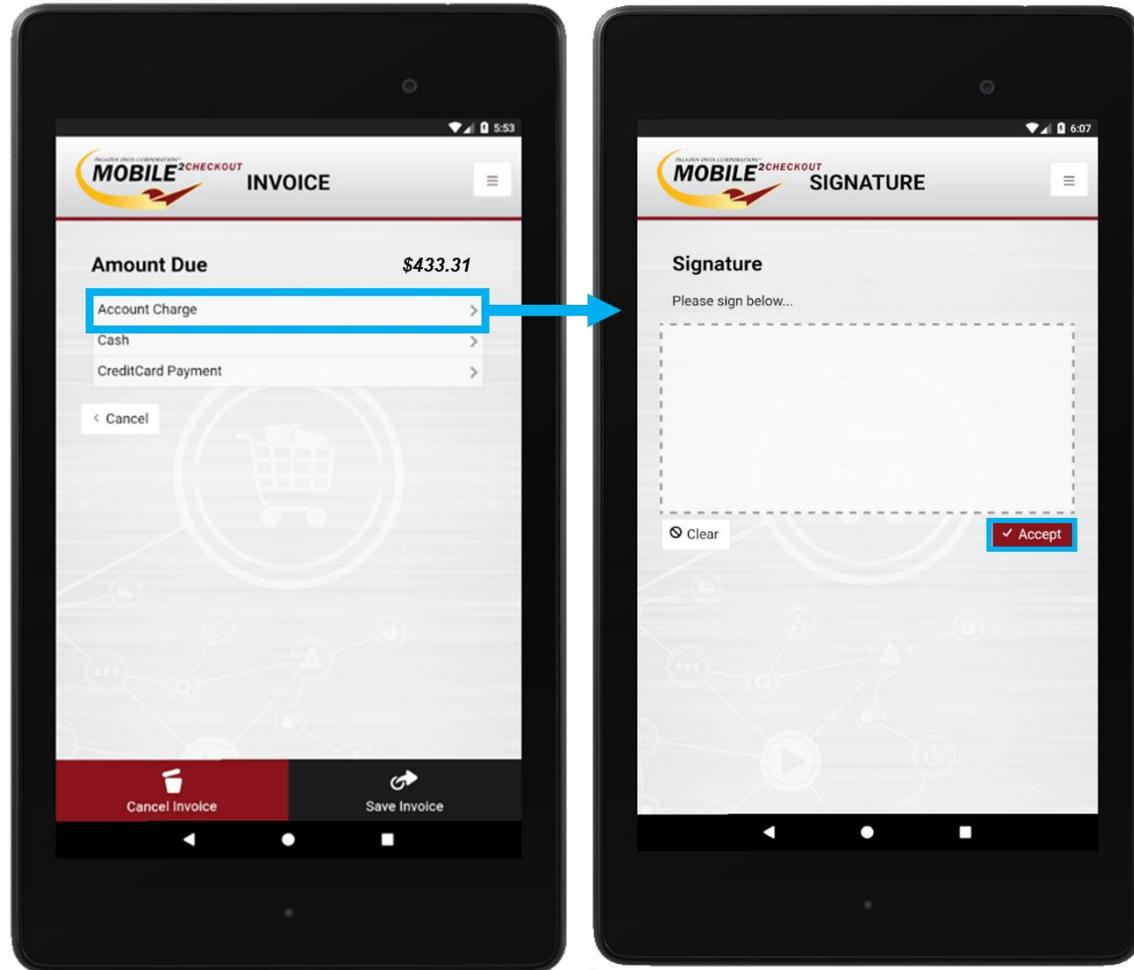
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Accepting multiple forms of payment



- **Account Charge:** Charge the customer's account and collect the customer's signature.



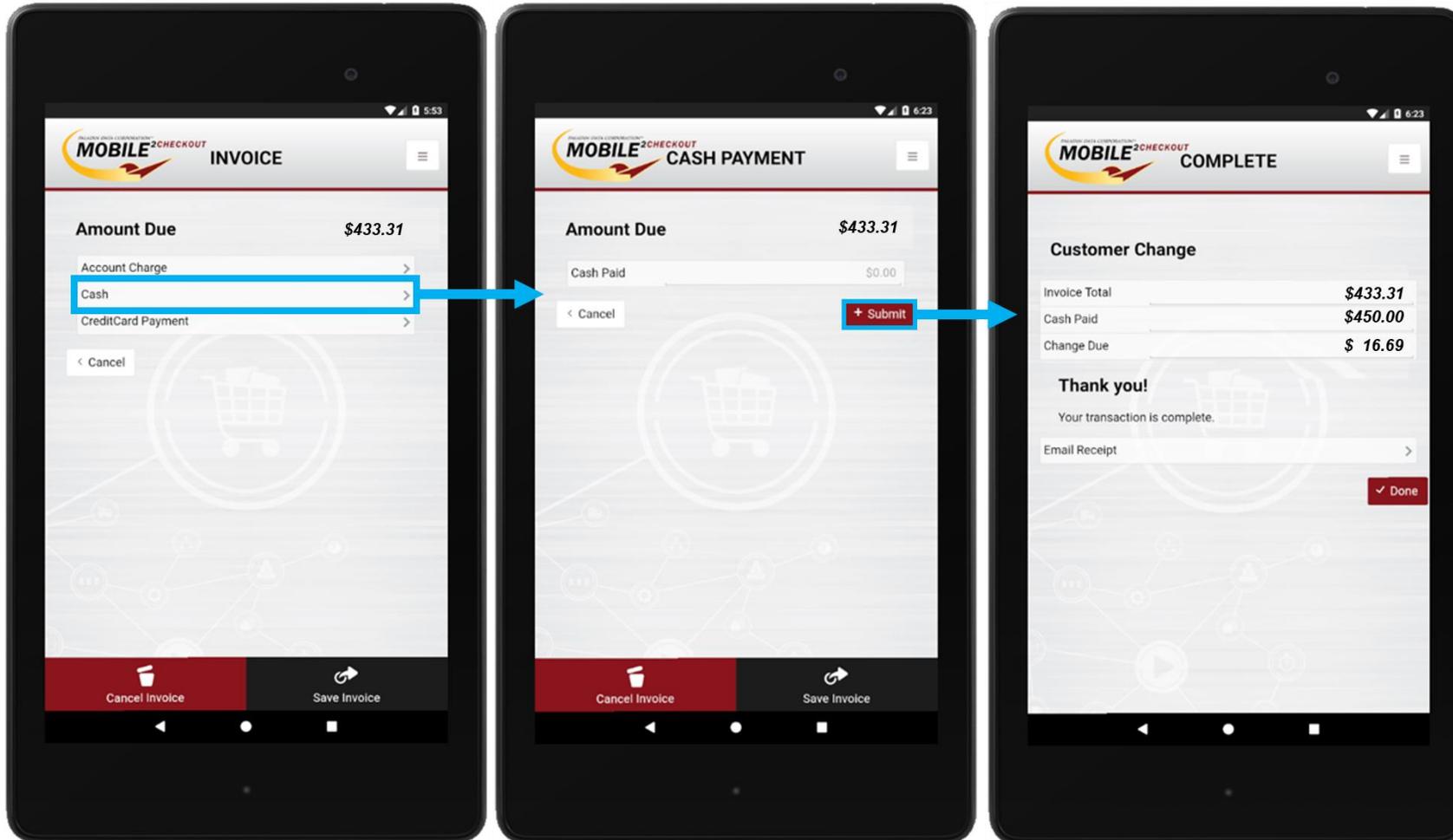
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Accepting multiple forms of payment



- **Cash:** Accept a cash payment.



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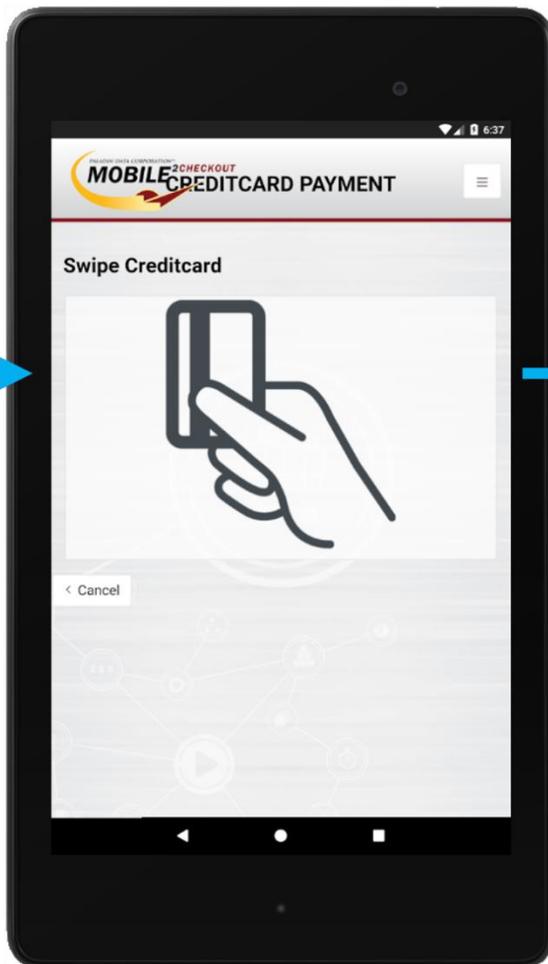
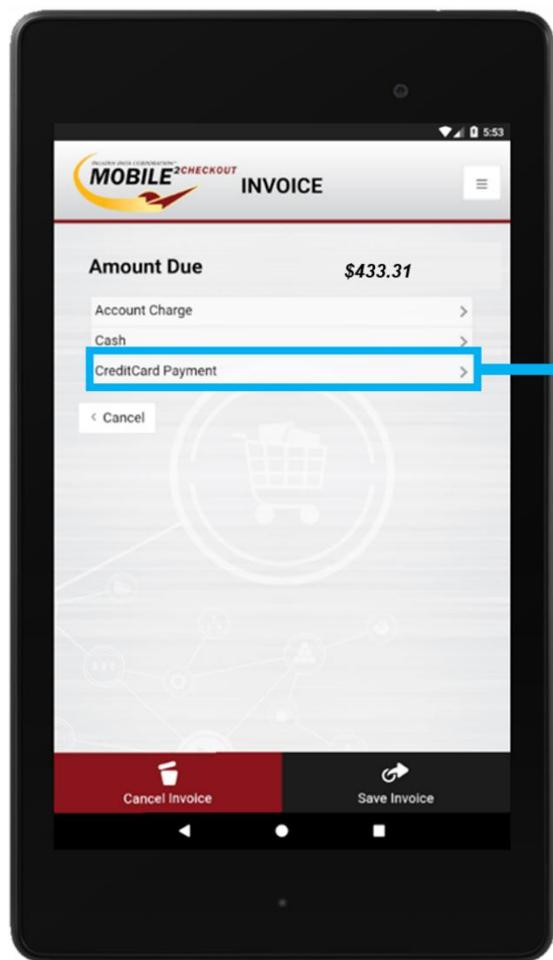
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Accepting multiple forms of payment

- **Credit Card:** Process a credit card payment and collect the customer's signature.

Note: Contact Paladin Support to obtain the point-to-point encryption (P2PE) credit card device for your Worldpay (formerly Vantiv) card processing account.





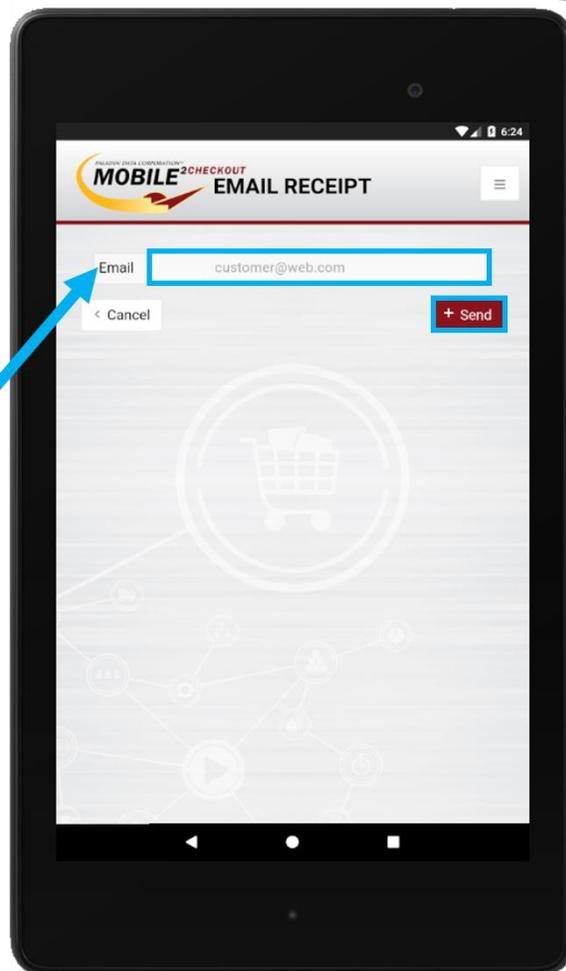
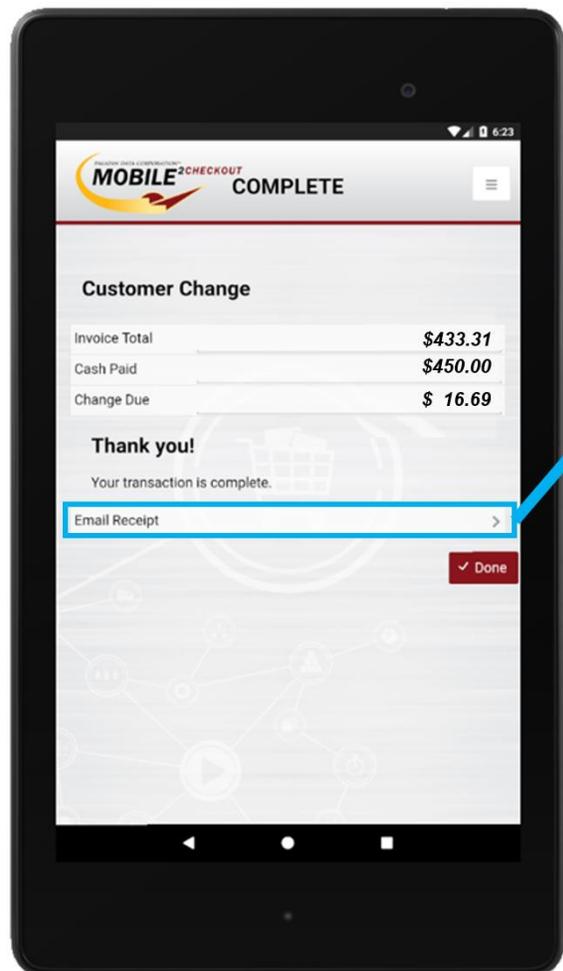
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Emailing the receipt



- After the transaction is complete, if you selected a Paladin customer that had an email address on file, the invoice is automatically sent to that email address.
- If you did not select a customer or if the Paladin customer does not have an email on file, an **Email Receipt** option appears. If you want to specify an email for the receipt, tap **Email Receipt**, enter an email address, and then tap **Send**. Otherwise, tap **Done**.

Note: You must have email account set up in the default Mail app on your Android device to use the email feature.



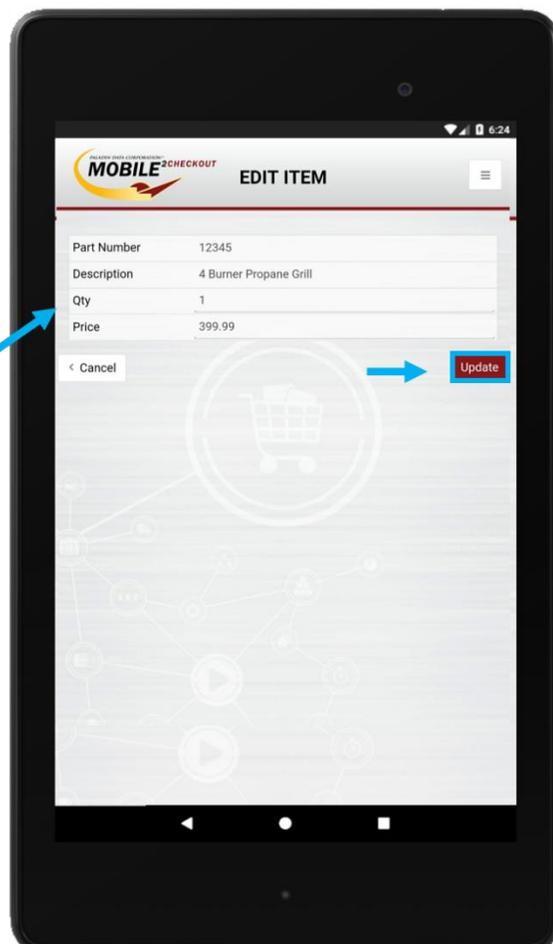
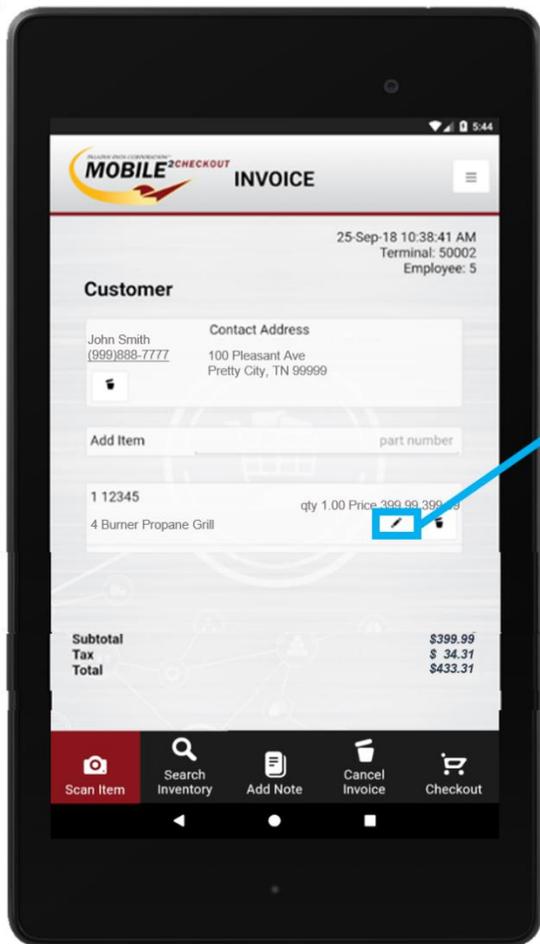
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Processing item returns



- To process a returned item, follow the same steps as editing the quantity, and enter a negative quantity.



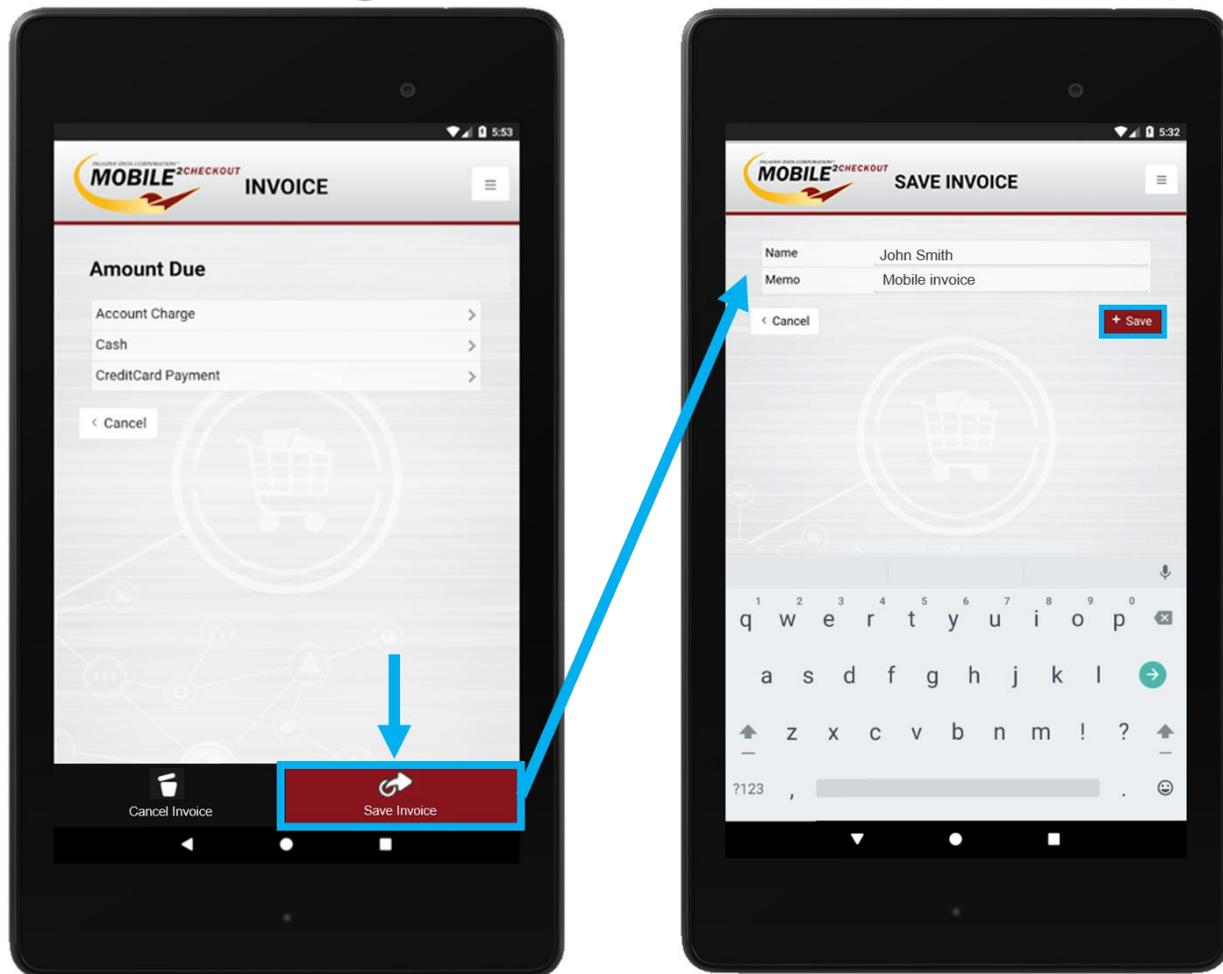
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Saving a transaction for later processing in Paladin Point of Sale



- When you start the checkout process, you can store the transaction, and complete the transaction later in Paladin Point of Sale.
- To store the transaction, after you click **Checkout**, when the screen where you select a payment type appears, tap **Save Invoice**, and then enter a **Name** and **Memo** to identify the transaction when you recall it later.



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Recalling Mobile2Checkout “saved” invoices

Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone
Credit Address 1 City/State/Zip Fax

Recall Transaction Cancel

Suspended Sale Quote — Order Kit Special Order On Hold Delivery

Show for all customers

Name	Memo	Order	Date	Emp #	Acct #
Brown, George	Building supplies		20-Sep-18 11:58	2	0
John Smith	Mobile invoice		01-Jan-00 00:00	2	0
Jones, Adam	Fence supplies		20-Sep-18 11:52	2	0
Owen, Mary	Kitchen granite countertop		20-Sep-18 11:59	2	0
Smith, John	Bathroom remodel		16-Oct-18 12:11	2	0

Report All Delete Update Retail Update Retail **F6 Recall Transaction** **F12 Recall**

- To recall a Mobile2Checkout™ “saved invoice” in Paladin Point of Sale, in the Invoice/Quote module, click **Recall Transaction** or press F6, and select **Quote — Order**.
- The invoice will appear in the list with the name and memo that you entered on your device. Highlight the quote and press **F12 Recall**.



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Learn more

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

[Paladin goes mobile—Sell anywhere with the Mobile2Checkout app](#)

[How to use the Mobile2Checkout app on an Android device](#)

[Paladin Fall 2018 Release Guide](#)

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



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