



Paladin Makes Lumber Easy

Charles Owen
Chief Experience Officer
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WHAT YOU'LL LEARN

- How 2020 changed the lumber industry.
- Paladin tools that make lumber easy.
 - Profit analyst
 - Footage calculators
 - Quotes/Invoicing features - MBF, MSF, Ton prices
 - Minimum margin protections
 - Custom pricing
 - Order Manager for lumber
 - Special orders and yard orders
 - Mobile2Deliver and Mobile2Checkout
 - Accounts receivable

How 2020 Changed Everything



The domestic lumber industry has taken a beating over the past few years starting with the U.S.-China trade war.

- In 2020, hurricanes, wildfires and the coronavirus pandemic further crippled the industry. Exports decreased and mills cut production because of virus closures.
- From April to September last year, lumber prices increased 170% which raised building costs up to \$16,000 per single family home and created a lumber shortage.

How 2020 Changed Everything

Additionally, when American workers began working from home due to quarantines, DIY projects soared.

- One survey showed that more than 70% of Americans began home improvement projects after the initial pandemic quarantine.
- Deck construction increased 275% from March to June.
- Fence construction increased 144% during the same period.
- Lumber prices peaked at roughly \$950 per thousand board feet in September.



Paladin's Tools Make Lumber Easy

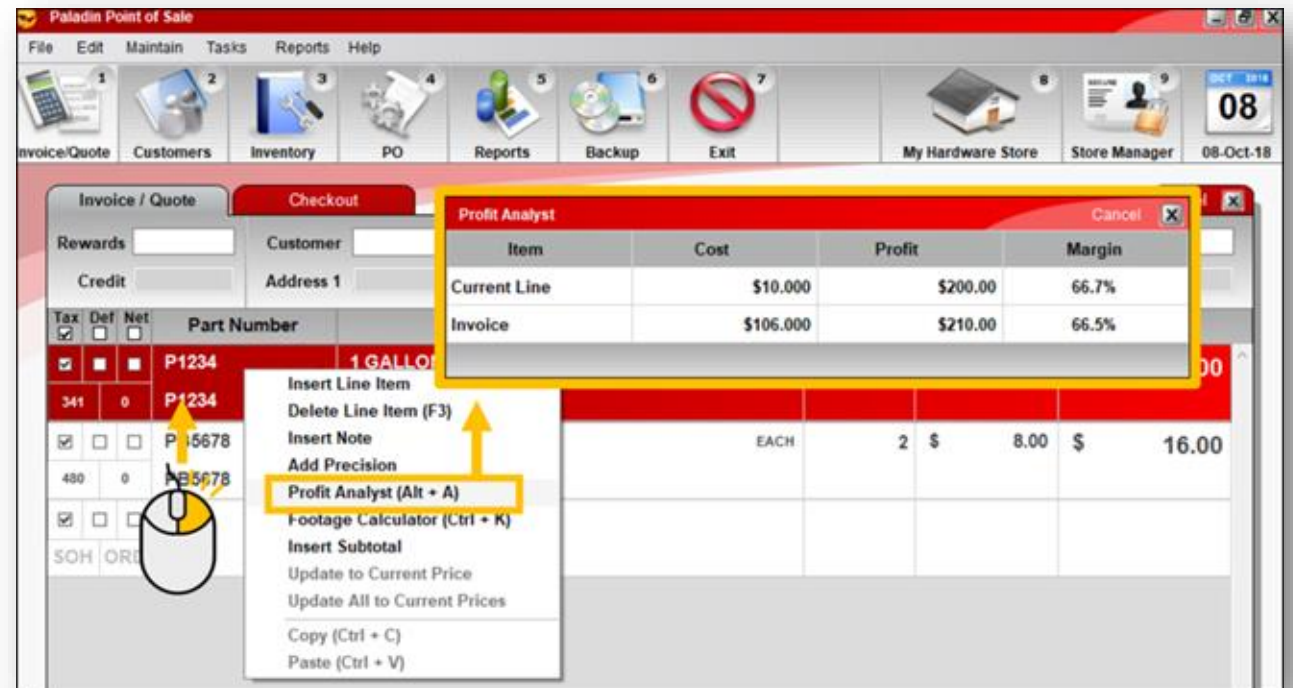


“Lumber is a different entity. What other industry do you buy something one way and sell it another? Take paint, for instance. You buy five gallons of paint, one gallon of paint, a quart of paint and you sell it that way. Lumber, it’s all by footage and you buy it in different lengths than you sell it in. Paladin’s lumber tools were what attracted me. We use them extensively.” - Josh Hanson, Tightwads Discount Building Supply

Profit Analyst

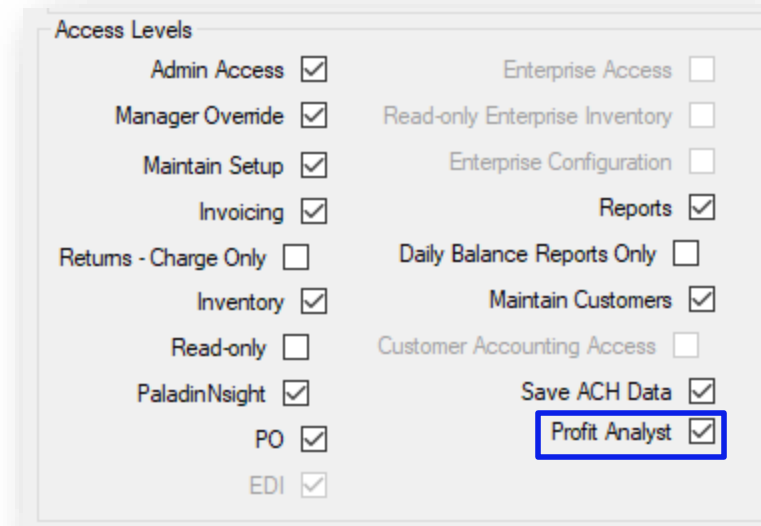
The **Profit Analyst** gives you the competitive edge when generating customer quotes.

- View invoice cost, profit, and margin when building quotes/invoices.
- Customize retail prices while maintaining your profitability.
- Access with Alt + A key combination or right-mouse click.



Employee Access to Profit Analyst

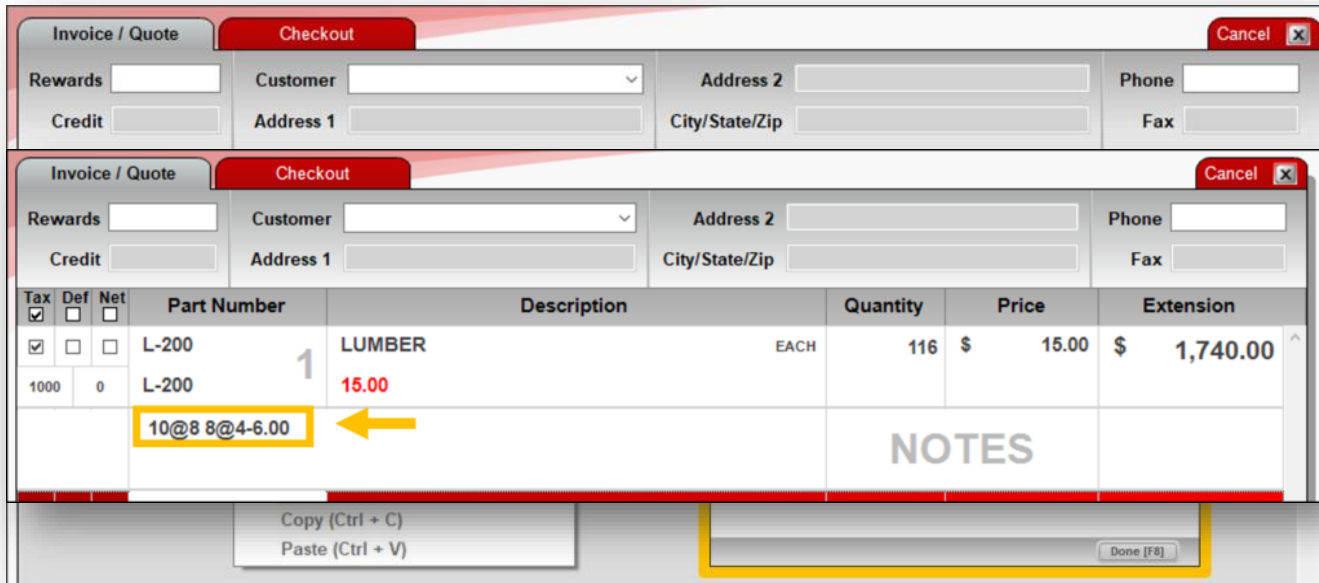
- Employees are granted permission to Profit Analyst via an employee Access Level.
- **File > Setup > Employees** tab
- In the **Access Levels** pane, select **Profit Analyst**.



Access Levels

Admin Access <input checked="" type="checkbox"/>	Enterprise Access <input type="checkbox"/>
Manager Override <input checked="" type="checkbox"/>	Read-only Enterprise Inventory <input type="checkbox"/>
Maintain Setup <input checked="" type="checkbox"/>	Enterprise Configuration <input type="checkbox"/>
Invoicing <input checked="" type="checkbox"/>	Reports <input checked="" type="checkbox"/>
Returns - Charge Only <input type="checkbox"/>	Daily Balance Reports Only <input type="checkbox"/>
Inventory <input checked="" type="checkbox"/>	Maintain Customers <input checked="" type="checkbox"/>
Read-only <input type="checkbox"/>	Customer Accounting Access <input type="checkbox"/>
PaladinNsight <input checked="" type="checkbox"/>	Save ACH Data <input checked="" type="checkbox"/>
PO <input checked="" type="checkbox"/>	Profit Analyst <input checked="" type="checkbox"/>
EDI <input checked="" type="checkbox"/>	

Footage Calculator



Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L-200	LUMBER	116	\$ 15.00	\$ 1,740.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L-200		10	\$ 15.00	

10@8 8@4-6.00

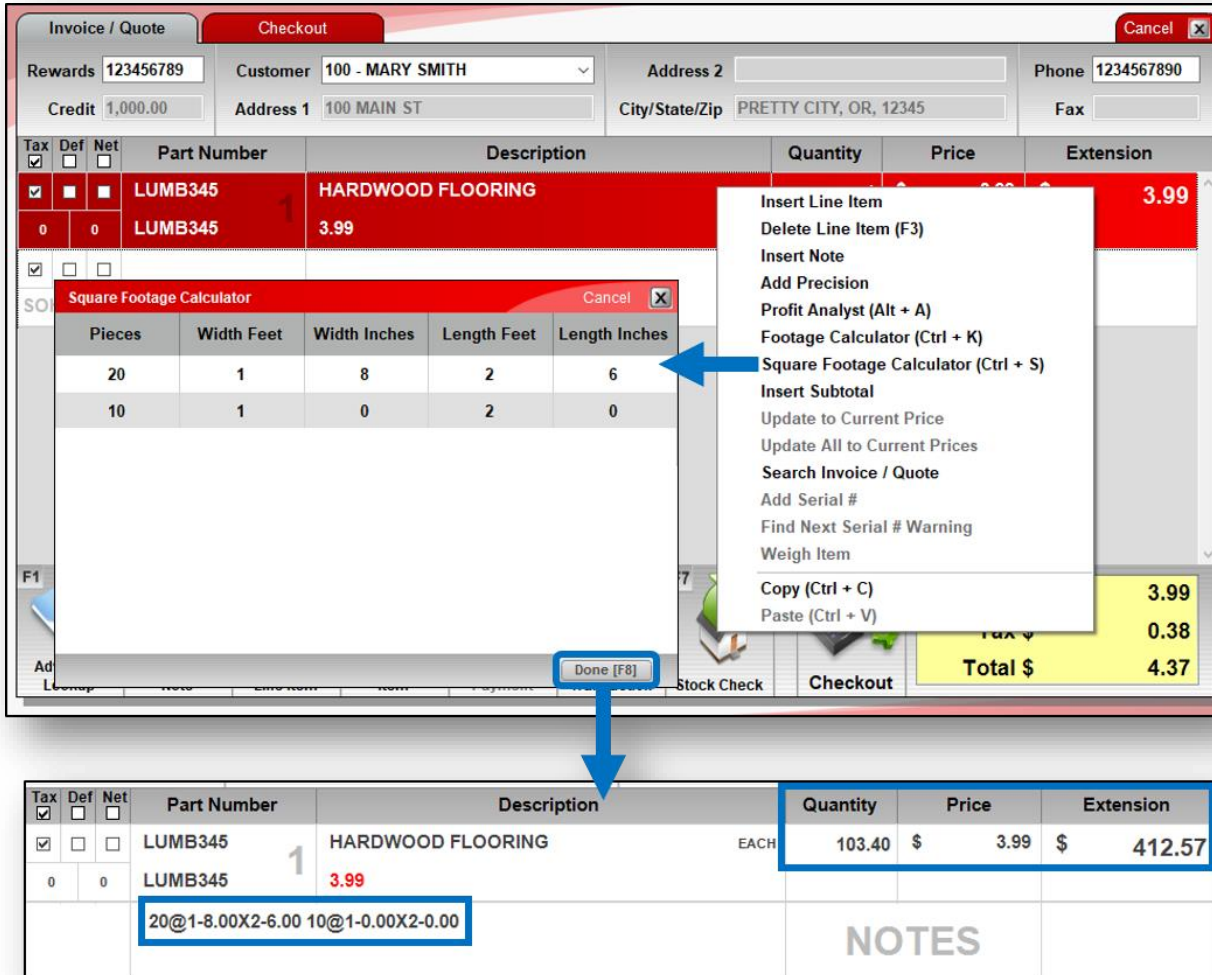
NOTES

Copy (Ctrl + C)
Paste (Ctrl + V)

Done [F8]

- The **Footage Calculator** lets you create a tally of items by defining pieces with different lengths (feet and inches).
- This feature is useful when you sell items in multiple lengths, such as lumber and metal roofing.
- Also available for purchase orders.
- Access with CTRL+ K key combination or right-mouse click.

Square Footage Calculator



The screenshot shows the 'Square Footage Calculator' window overlaid on an invoice. The calculator has the following fields:

Pieces	Width Feet	Width Inches	Length Feet	Length Inches
20	1	8	2	6
10	1	0	2	0

The 'Done [F8]' button is highlighted with a blue arrow pointing to the 'Quantity' field in the invoice item below.

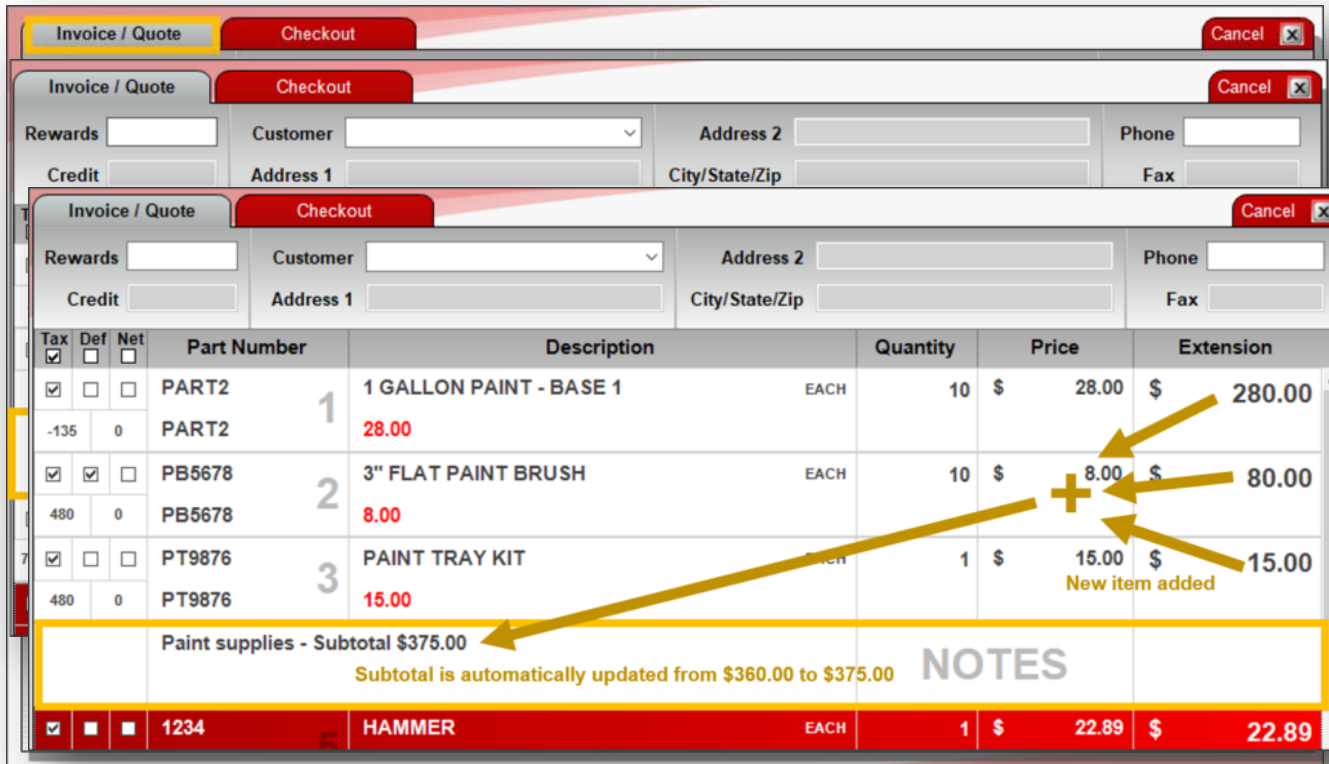
The invoice item is:

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB345	HARDWOOD FLOORING	1	3.99	3.99
0	0	0	LUMB345	3.99			
20@1-8.00X2-6.00 10@1-0.00X2-0.00							

The 'Quantity' field is now 103.40, and the 'Extension' is \$412.57. The 'NOTES' field is empty.

- Calculate square foot quantities for an invoice item based on dimensions (width/length) and # pieces that you enter.
- Quantities are recorded in a note.
- Right-click the item to access the calculator from the Quick Access menu or press Ctrl + S

Subtotals on Quotes/Invoices

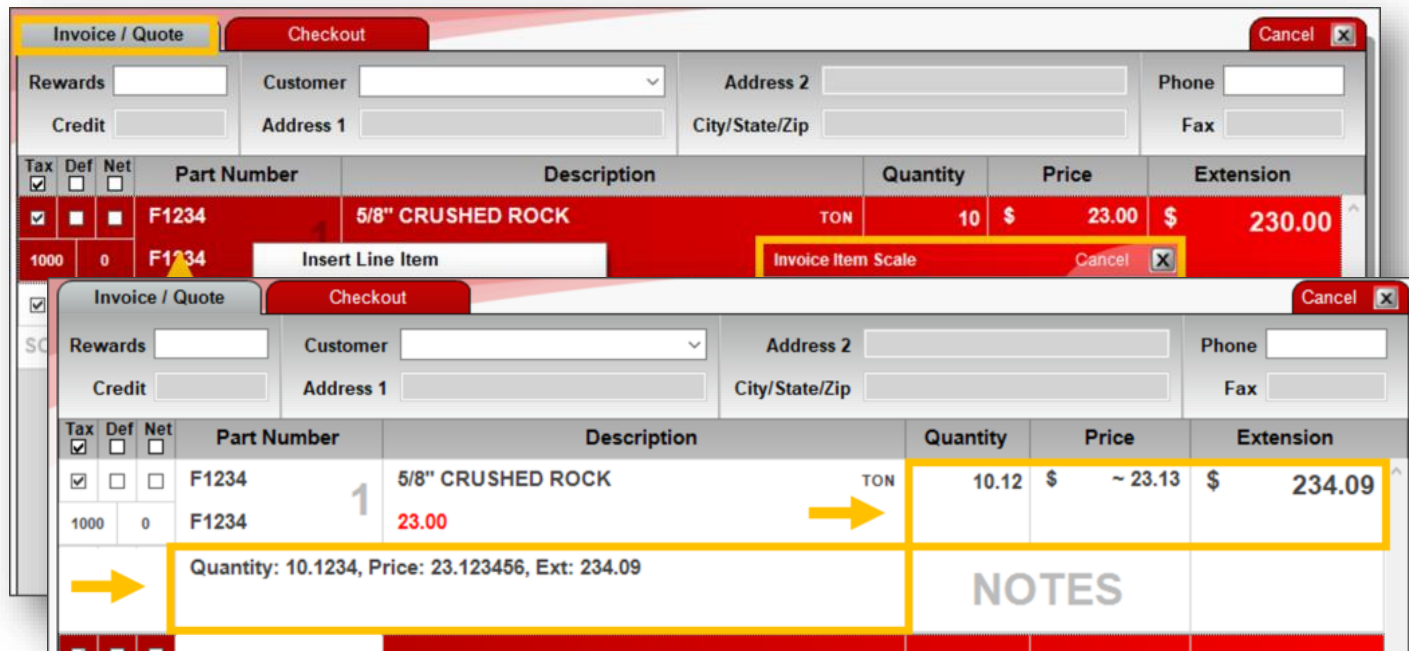


The screenshot shows a software interface for creating a quote or invoice. It features a table with columns for Tax, Def, Net, Part Number, Description, Quantity, Price, and Extension. The table contains three items: 1 GALLON PAINT - BASE 1, 3" FLAT PAINT BRUSH, and PAINT TRAY KIT. A subtotal is calculated for the first two items, and a new item is added, which updates the subtotal. The subtotal is displayed as \$375.00, with a note indicating it was updated from \$360.00. The interface also includes fields for Rewards, Customer, Address, City/State/Zip, Phone, and Fax.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	1 GALLON PAINT - BASE 1	10	\$ 28.00	\$ 280.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PB5678	3" FLAT PAINT BRUSH	10	\$ 8.00	\$ 80.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PT9876	PAINT TRAY KIT	1	\$ 15.00	\$ 15.00
Paint supplies - Subtotal				\$375.00			
Subtotal is automatically updated from \$360.00 to \$375.00				NOTES			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1234	HAMMER	1	\$ 22.89	\$ 22.89

- Insert dynamic **Subtotals** throughout the invoice.
- A subtotal is inserted above the line item.
- The subtotal is calculated from the previous subtotal.
- Any price changes will be updated and reflected in the subtotal.

Up to 6 Decimal Point Fractions for Prices/Quantities

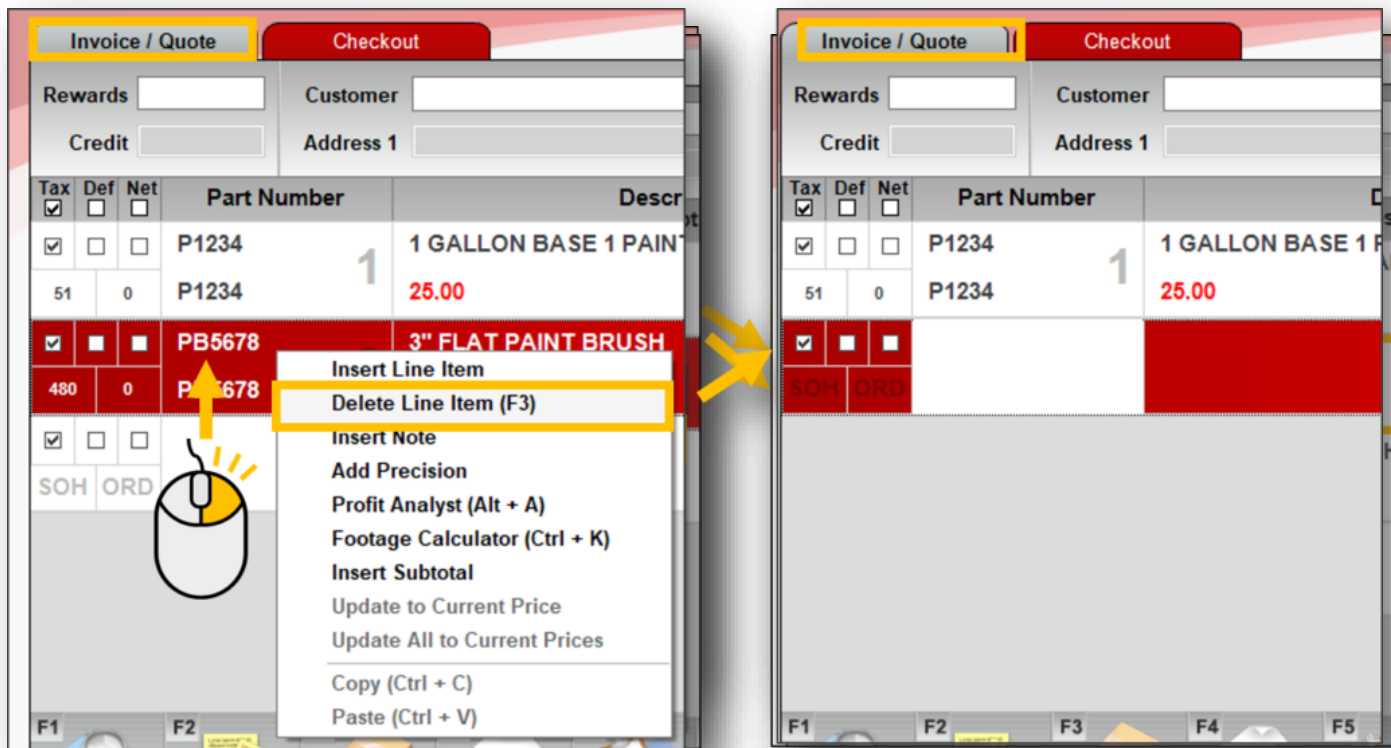


Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F1234	5/8" CRUSHED ROCK	TON 10	\$ 23.00	\$ 230.00
1000	0		F1234	Insert Line Item			

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F1234	5/8" CRUSHED ROCK	TON 10.12	\$ ~ 23.13	\$ 234.09
1000	0		F1234	23.00			
Quantity: 10.1234, Price: 23.123456, Ext: 234.09					NOTES		

- More decimal places on invoice item quantities and prices means more precision.
 - **Quantity:** Up to 4 decimal places
 - **Price:** Up to 6 decimal places
 - A real-time **Extension** value is calculated as you adjust the **Quantity** and **Price**.
- Right-click line-item and select **Add Precision**.

Insert Items & Notes on Quotes



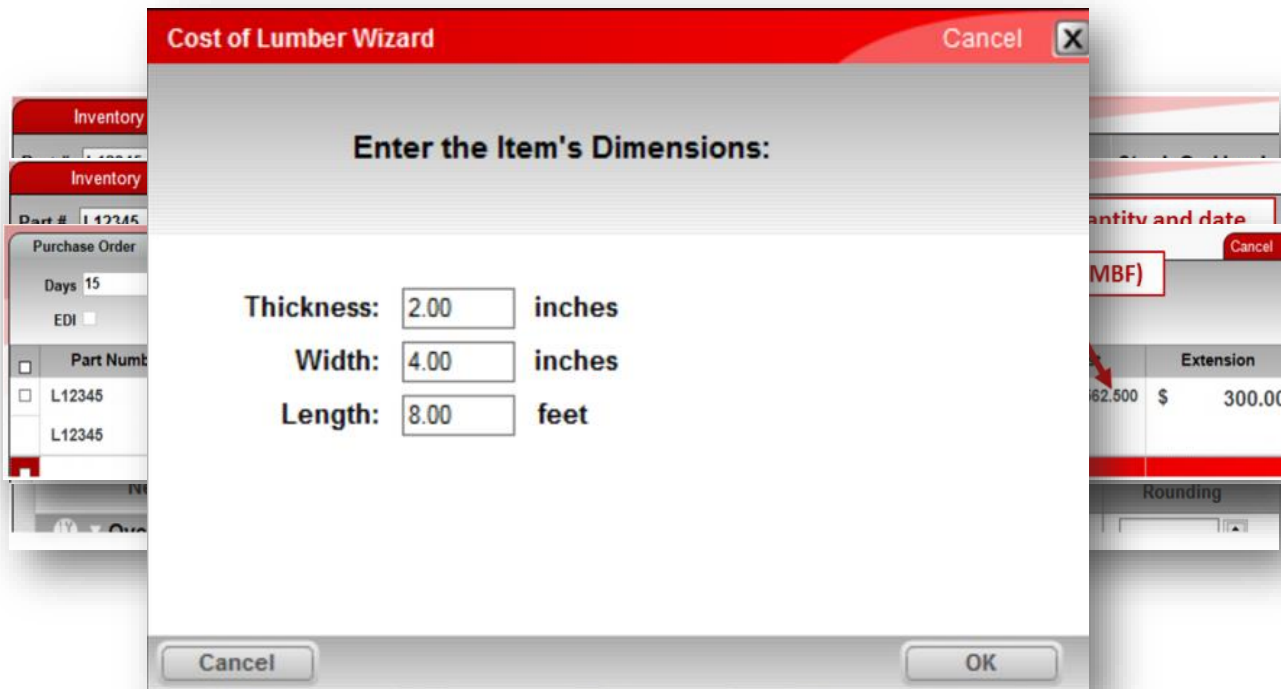
Insert a line item or note anywhere on the invoice or purchase order.

- A new line item is inserted above the selected line.
- If you want to insert a note instead, select **Insert Note**.
- You can also select **Delete Line Item**.

Purchase by MBF and Sell by the Stick

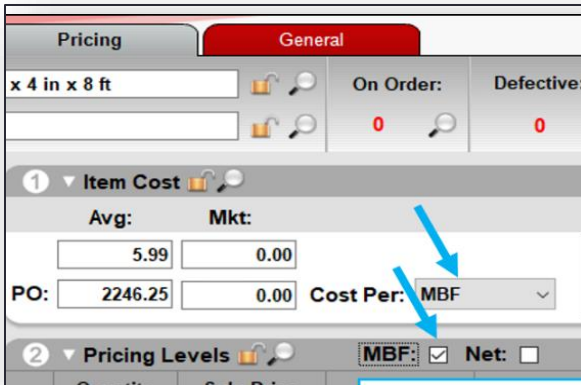
Thousand board foot calculations can be factored into inventory.

- Stick cost is automatically calculated based on MBF cost.
- Retail price can be changed automatically to reflect the new MBF cost when receiving purchase orders based on your desired margin.
- Per item cost and equivalent MBF cost, will appear when added to a PO.



The image shows a software interface for calculating lumber costs. The primary window is titled "Cost of Lumber Wizard" with a red header bar and a "Cancel" button in the top right. It prompts the user to "Enter the Item's Dimensions:" and contains three input fields: "Thickness: 2.00 inches", "Width: 4.00 inches", and "Length: 8.00 feet". At the bottom are "Cancel" and "OK" buttons. In the background, several other windows are visible, including "Inventory", "Purchase Order", and a table with columns for "Quantity and date", "MBF", "Extension", and "Rounding". The "Purchase Order" window shows "Days 15" and "EDI" options. The table in the background has a row with values "62.500" and "\$ 300.00".

Show MBF, MSF and Ton prices on quotes/invoices



Pricing General

x 4 in x 8 ft

On Order: 0 Defective: 0

1 Item Cost

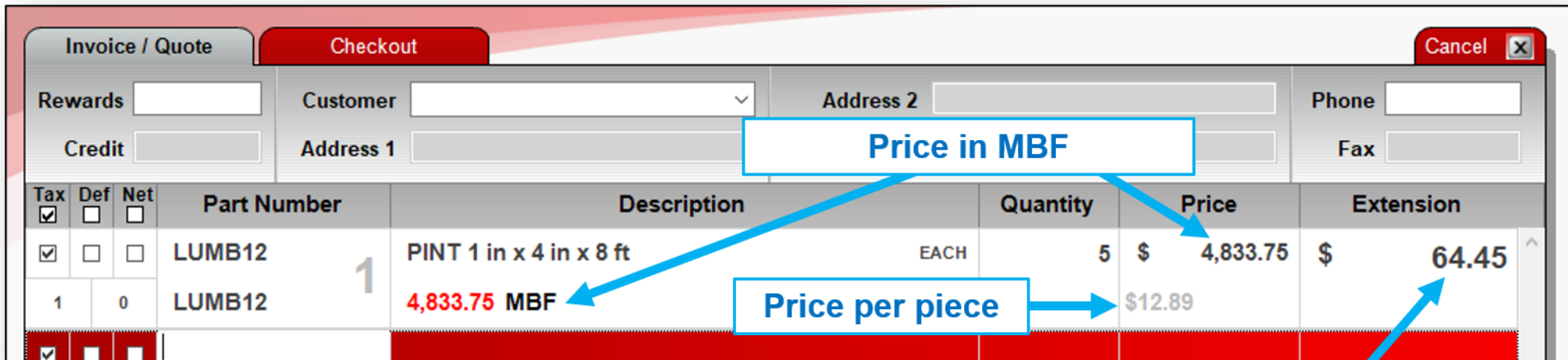
Avg: 5.99 Mkt: 0.00

PO: 2246.25 Cost Per: MBF

2 Pricing Levels

MBF: ☒ Net: ☐

- A new inventory setting (checkbox) lets you show prices in thousand board feet (MBF), thousand square feet (MSF), or tons on invoices and quotes.
- To turn on, select the **MBF**, **MSF** or **TON** checkbox.

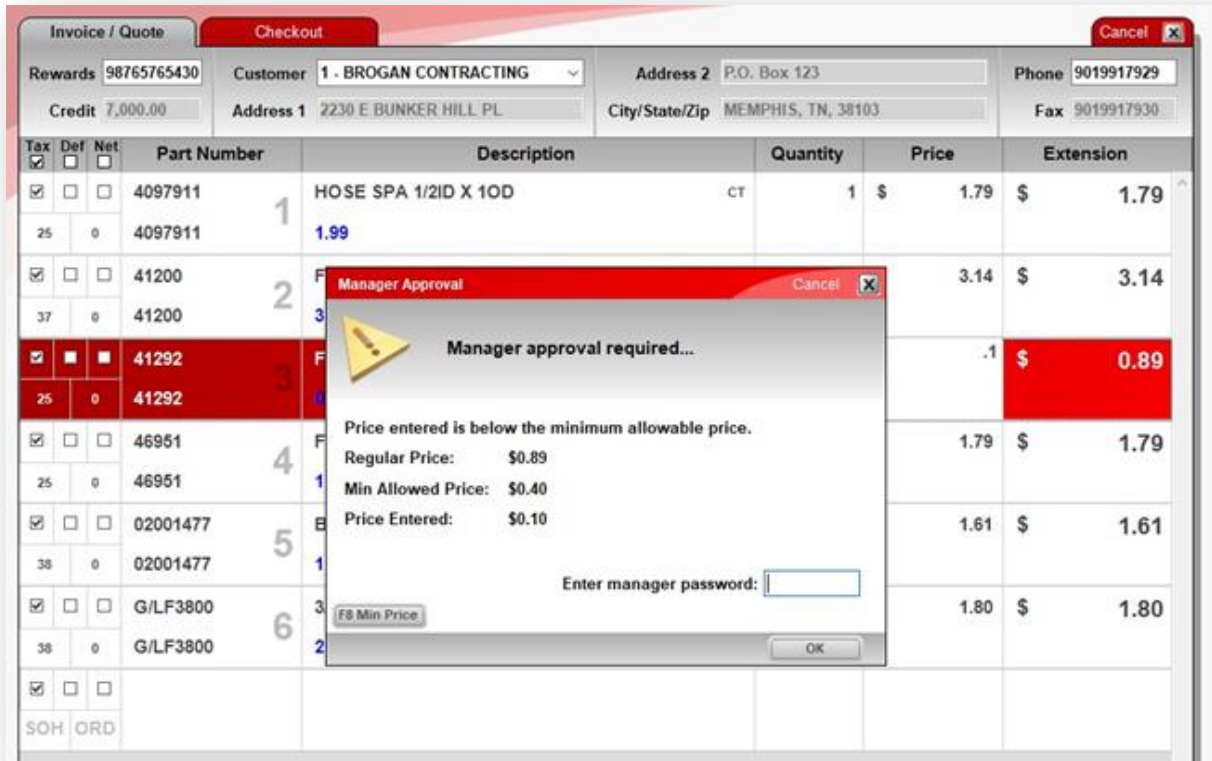


Invoice / Quote Checkout

Rewards: Credit: Customer: Address 1: Address 2: Phone: Fax:

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LUMB12	PINT 1 in x 4 in x 8 ft	EACH 5	\$ 4,833.75	\$ 64.45
1	0		LUMB12	4,833.75 MBF		\$12.89	

Minimum Margin Protection



The screenshot shows a software interface for a checkout process. A 'Manager Approval' dialog box is displayed, indicating that the price entered for item 41292 is below the minimum allowable price. The dialog box provides the following information:

- Price entered is below the minimum allowable price.
- Regular Price: \$0.89
- Min Allowed Price: \$0.40
- Price Entered: \$0.10

The dialog box also includes a field for 'Enter manager password:' and an 'OK' button. The background shows a table with columns: Tax, Def, Net, Part Number, Description, Quantity, Price, and Extension. The table lists several items, including HOSE SPA 1/2ID X 10D, 41200, 41292, 46951, 02001477, and G/LF3800.

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4097911	HOSE SPA 1/2ID X 10D	1	\$ 1.79	\$ 1.79
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4097911			1.99	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41200			3.14	\$ 3.14
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41200				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41292			.1	\$ 0.89
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41292				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46951			1.79	\$ 1.79
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46951				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	02001477			1.61	\$ 1.61
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	02001477				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/LF3800			1.80	\$ 1.80
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/LF3800				

- Eliminate selling items below profitable levels.
- Works on the following pricing scenarios:
 - Manual price changes at checkout
 - Using the F4 Discount button at checkout
 - During promotional sales
 - Applying loyalty points
 - Prompt payment discounts

Minimum Margin Settings

Paladin Configuration

Min Margin Pharmacy Pricing Plan Receivables Remote Access Rewards Rounding Sale List Supplier Taxes Terminals U/M
 Invoice (Local) Network Secure Accounting ACH Class Credit Card Company Data Archive Delivery Dept Employees Forms Invoice (Store) Loc

Departments

☒ Active ☐ Deleted

ID Name

40	PLUMBING SUP...
46	HEATING AND C...
50	HARDWARE
56	FASTENERS
58	BUILDING MATE...
60	APPLIANCES AN...
64	HOUSEWARES ...
69	LUMBER
70	LAWN / GARDE

New Remove Export

Name BUILDING MATE Department label number 58

#	Store Name	Dept non-taxable	State non-taxable	County non-taxable	City non-taxable	PO system number-of-days %	Suggested min factor %	Minimum Margin %
1	Hometown ACE ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	45	20

- Set a global min margin.
- Optionally override global min margin for specific departments.
- Export a department list to Excel to save or print.

Custom Discounts & Pricing Plans

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 2 3 4 5 6 7 8 9

Invoice/Quote Customers Inventory PO Reports Backup Exit ACE HARDWARE Paladin Support 07-Feb-19

Invoice / Quote Checkout Cancel

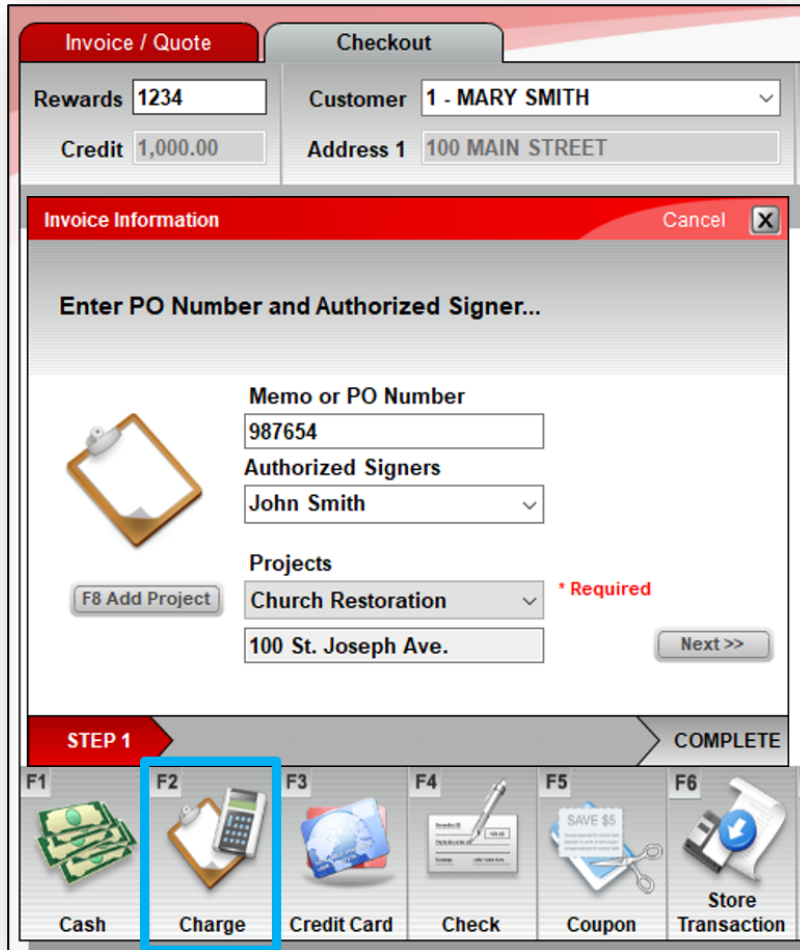
Rewards: 98765765430 Customer: 1 - BROGAN CONTRACTING Address 2: P.O. Box 123 Phone: 9019917929

Credit: 7,000.00 Address 1: 2230 E BUNKER HILL PL City/State/Zip: MEMPHIS, TN, 38103 Fax: 9019917930

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4097911	HOSE SPA 1/2ID X 10D	1	\$ 1.79	\$ 1.79
			4097911	1.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41200	FLARE TEE1/4BRS	1	\$ 3.14	\$ 3.14
			41200	3.49			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41292	FROZN FOOD VAC REFILL-QT	1	\$ 0.89	\$ 0.89
			41292	0.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46951	FLARE RED UNION 3/8X1/4B	1	\$ 1.79	\$ 1.79
			46951	1.99			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	02001477	BEEF STICK ORIGINAL	1	\$ 1.61	\$ 1.61
			02001477	1.79			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/LF3800	3/8 HEX PLUG	1	\$ 1.80	\$ 1.80
			G/LF3800	2.00			

- Create customized trade discounts.
- No more price haggling.
- Consistent prices are assured.
- Specialize pricing plans for specific trades.
- Cashier just needs to enter customer and the system automatically applies the proper discount.

Invoice Notes, Authorized Signer and Project



Invoice / Quote Checkout

Rewards 1234 Customer 1 - MARY SMITH

Credit 1,000.00 Address 1 100 MAIN STREET

Invoice Information Cancel X

Enter PO Number and Authorized Signer...

Memo or PO Number
987654

Authorized Signers
John Smith

Projects
Church Restoration * Required

100 St. Joseph Ave. Next >>

STEP 1 COMPLETE

F1 Cash F2 Charge F3 Credit Card F4 Check F5 Coupon F6 Store Transaction

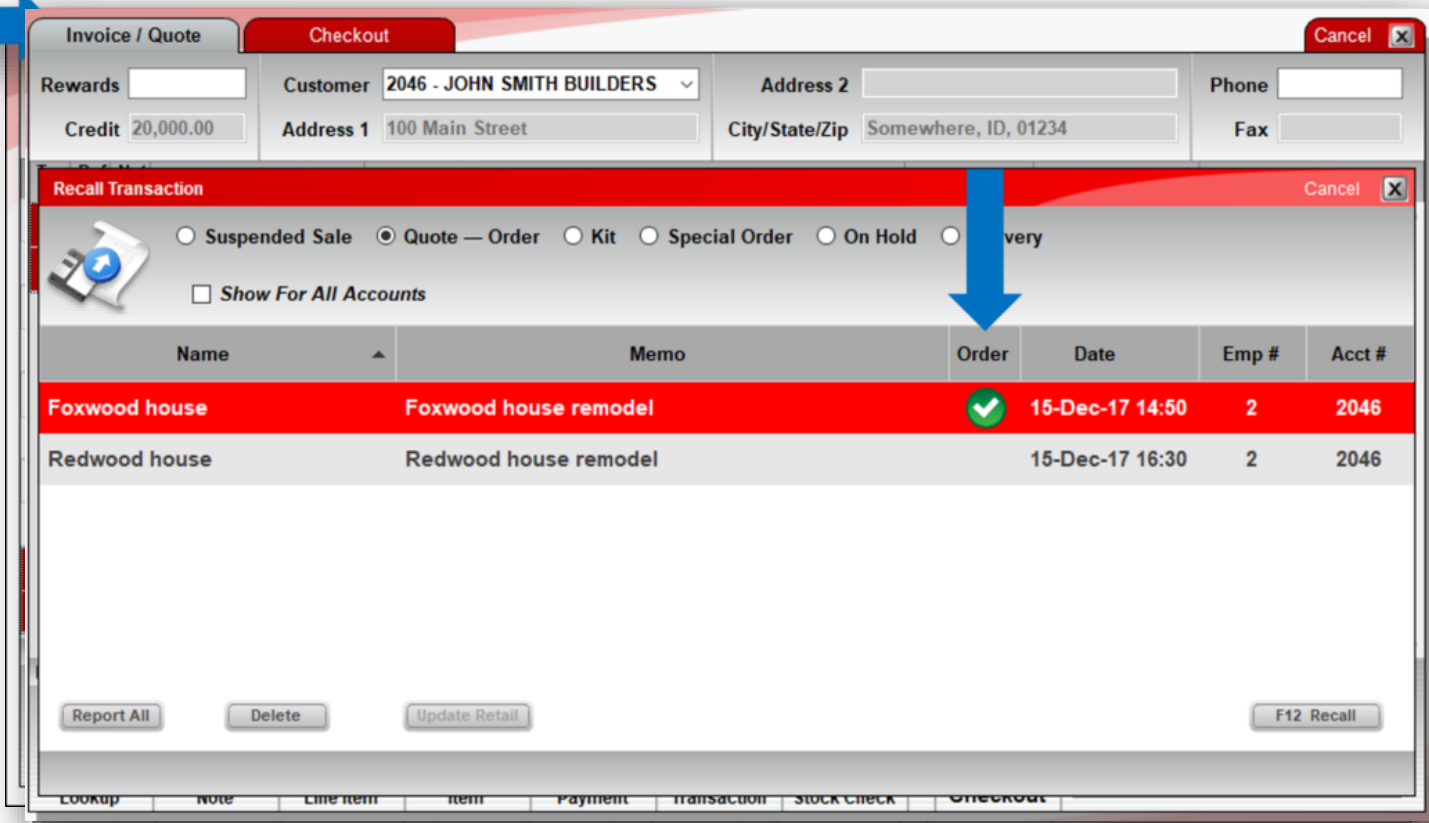
- For Charge customers with store credit
 - Record a PO # or memo
 - Select from a list of authorized signers
 - Select a project or add a new one

Order Manager for Lumber



- Manage large complicated orders by selling items over time.
- Track what you've sold and what items remain on the order.
- Orders are automatically closed when all items are sold or when you manually close the order.
- To create an order, click **Order Manager** or press F5 when you recall a quote.

How Order Manager Turns a Quote into an Order



The screenshot shows the 'Recall Transaction' window in the Order Manager software. The window has a red header bar with the title 'Recall Transaction' and a 'Cancel' button. Below the header, there are radio buttons for transaction types: 'Suspended Sale', 'Quote — Order' (selected), 'Kit', 'Special Order', 'On Hold', and 'Inventory'. There is also a checkbox for 'Show For All Accounts'. Below this is a table with columns: Name, Memo, Order, Date, Emp #, and Acct #. The table contains two rows: 'Foxwood house' with memo 'Foxwood house remodel' and 'Redwood house' with memo 'Redwood house remodel'. The 'Foxwood house' row has a green checkmark in the 'Order' column. At the bottom of the window, there are buttons for 'Report All', 'Delete', 'Update Retail', and 'F12 Recall'.

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

- Recall the quote and then click **Order Manager** or press F5.
- All items on the original quote will become order items.
- An order item shows the original quoted amount and tracks the number of items already sold.
- Orders are identified by a green check icon.

Order Manager – Displaying Open | All

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
20	0	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	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	0	T12345		Quote: 10 Sold: 0		

Items below this line are not part of the managed order.

NOTES

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

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

- To sell a partial quantity, change the **Quantity** and then click **Checkout** to process the transaction.
- Sold quantities are shown.
- Two display modes:
 - **Displaying All:** Show all items on the original quote.
 - **Displaying Open:** Show items with unsold quantities only.

Order Tools – Auto-fill Quantity

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"/>	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	4.44
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
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
200	0		T12345	Quote: 10 Sold: 0			

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

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

- Highlight one or more order items and click **Auto-fill Quantity** to set the **Quantity** to the unsold amount.
- If you enter a **Quantity** greater than the unsold amount, the value will automatically update to the unsold quantity.

Order Tools – Item History

Order Manager **Checkout** Cancel X

Rewards Customer 2046 - JOHN SMITH BUILDERS Address 2 Phone

Credit 20,000.00 Address 1 Fax

Tax	Def	Net	Part Number	Inv #	Date	Quantity Sold	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	P54321	161200	15-Dec-17 15:23	2	4.49	\$ 0.00
28	0		P54321					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	L12345				30.00	\$ 0.00
5	0		L12345					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T12345				4.39	\$ 0.00
200	0		T12345					
			Items below this line are					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
SOH ORD								

Order History Cancel X

Inv #	Date	Quantity Sold
161200	15-Dec-17 15:23	2

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

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

- Highlight an item that has been partially or fully sold and click **Item History** to view the order item's sale history

Special Orders

- Force special orders to a large sheet.
- Set a percent deposit amount.
- Add a freight cost.
- Exclude special orders from rewards by class.

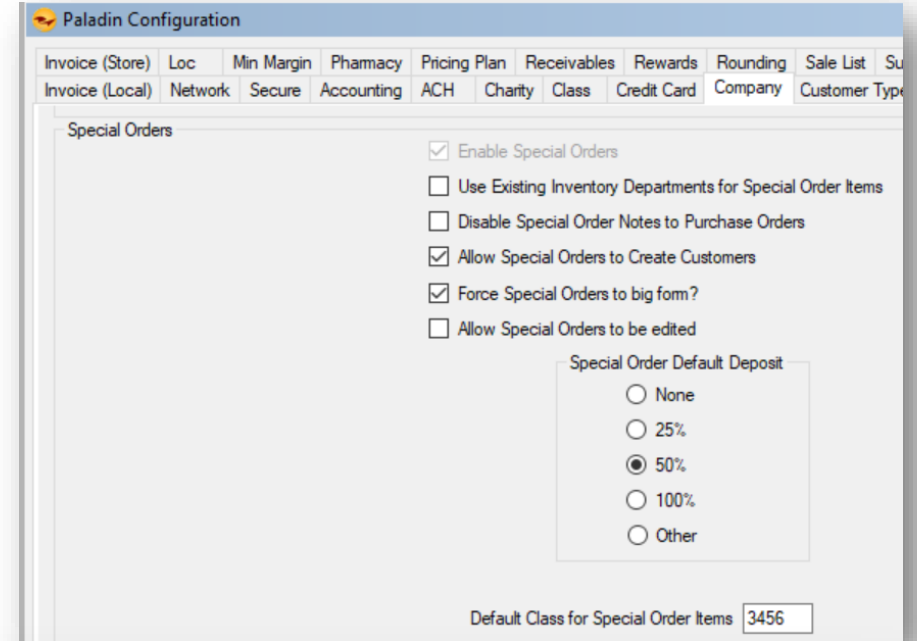


Special Order Deposit

Special Order Total \$983.25

☐ None \$0.00
☒ 25% \$245.81
☐ 50% \$491.63
☐ 100% \$983.25
☐ Other \$ 0.00

F12 Checkout



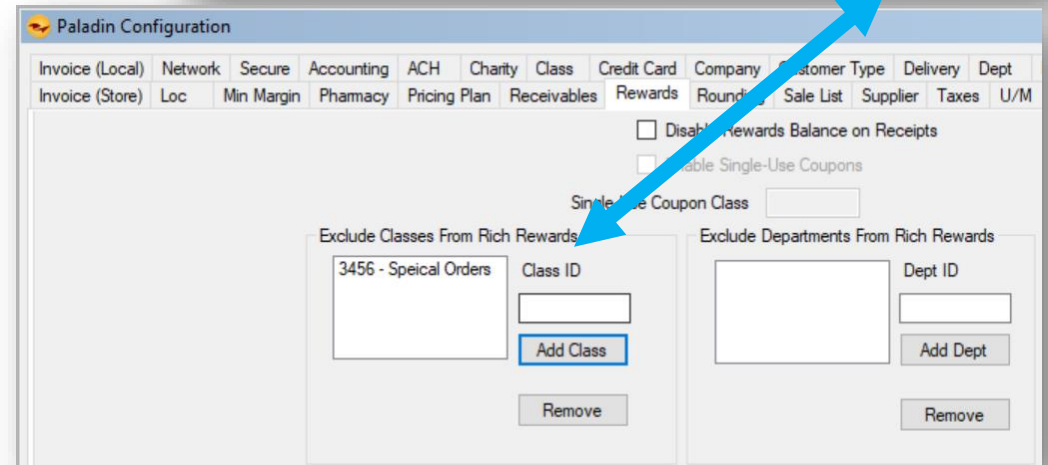
Paladin Configuration

☒ Enable Special Orders
☐ Use Existing Inventory Departments for Special Order Items
☐ Disable Special Order Notes to Purchase Orders
☒ Allow Special Orders to Create Customers
☒ Force Special Orders to big form?
☐ Allow Special Orders to be edited

Special Order Default Deposit

☐ None
☐ 25%
☒ 50%
☐ 100%
☐ Other

Default Class for Special Order Items 3456



Paladin Configuration

☐ Disable Rewards Balance on Receipts
☐ Disable Single-Use Coupons
 Single-Use Coupon Class

Exclude Classes From Rich Rewards

3456 - Special Orders

Class ID

Add Class

Remove

Exclude Departments From Rich Rewards

Dept ID

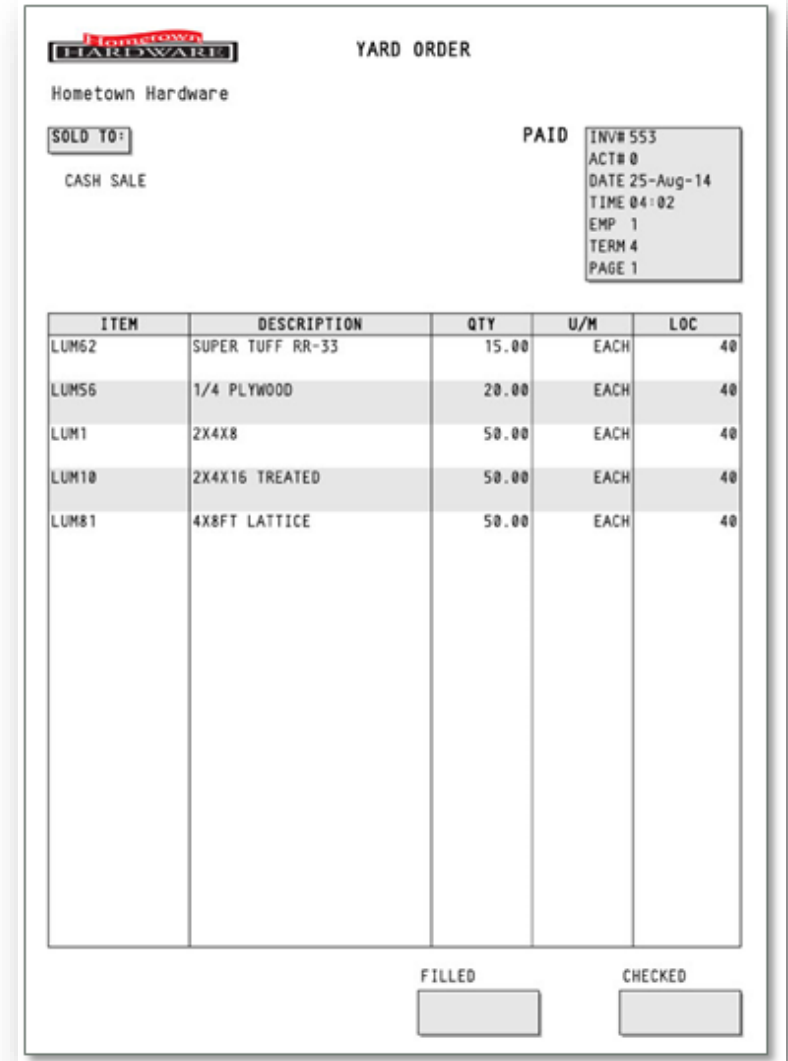
Add Dept

Remove

Yard Order Forms

Print yard orders at the register or in the yard.

- Up to four different form sizes/types of forms to choose from.
- Half page
- Full page
- Print from second tray in printer.
- Limit it to just yard order items or print the entire invoice.



Hometown Hardware YARD ORDER

Hometown Hardware

SOLD TO: CASH SALE

PAID INV# 553
ACT# 0
DATE 25-Aug-14
TIME 04:02
EMP 1
TERM 4
PAGE 1


ITEM	DESCRIPTION	QTY	U/M	LOC
LUM62	SUPER TUFF RR-33	15.00	EACH	40
LUM56	1/4 PLYWOOD	20.00	EACH	40
LUM1	2X4X8	50.00	EACH	40
LUM10	2X4X16 TREATED	50.00	EACH	40
LUM81	4X8FT LATTICE	50.00	EACH	40

FILLED ☐ **CHECKED** ☐

Delivery Order Forms

Print hardcopy delivery form.

- Includes delivery schedule (If the delivery scheduler is used).
- Box for “Received by:” and “Delivered by:” with Date & Time.



Transaction Complete

Print another copy?

1 None 2 Delivery Copy 3 Duplicate Receipt 4 Email Receipt 5 Full Sheet Invoice 6 QR Receipt 7 Yard Order 8 EMV Receipt

1 2 3 4 5 6 7 8

DELIVERY

LOGO

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

INVOICE # 730229
ACCOUNT # 9160
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

Compressed lines save space and paper

ITEM	DESCRIPTION	QTY ORD	U/M	QTY DELIVERED
P1234	1 GALLON BASE 1 PAINT	50.00	EACH	
P1234	*** DELIVERY - DELIVERY - DELIVERY ***			
	Scheduled: 17-Oct-18, 08:00 AM - 08:30 AM			
	Instructions:			
	Ask for Joe			
	Email: john.smith@myhardwarestore.com			
	Delivery Phone #: (999) 888-7777			
	Address:			
	1234 Pheasant Circle			
	Bldg A			
	Small Town, NE 00000			
	*** DELIVERY - DELIVERY - DELIVERY ***			
	PO # 123456			

PO number

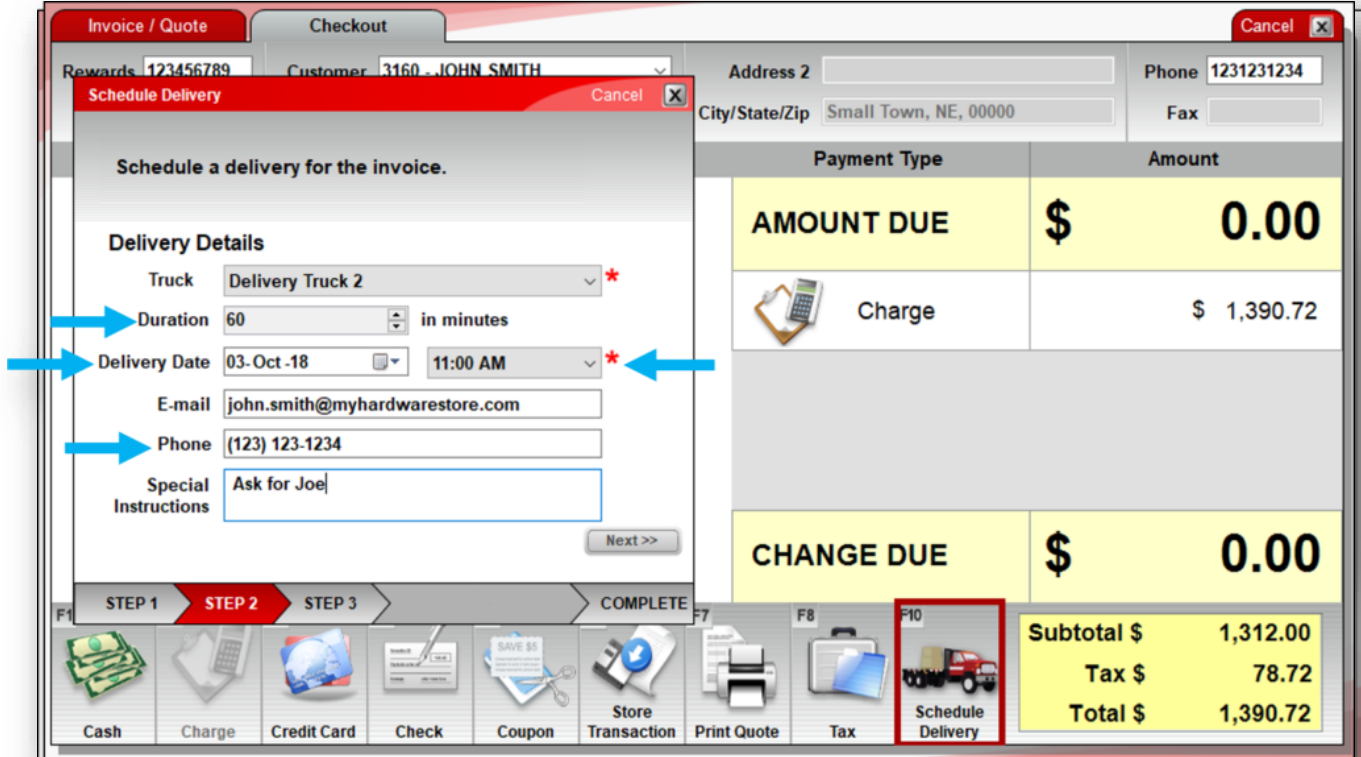
RECEIVED BY: _____

DELIVERED BY: _____ TIME: _____ DATE: _____

PROJECT 1234 Pheasant Circle

Mobile2Deliver – at Checkout in the Store

- Deliveries are initiated before payment is taken and scheduled after the payment is processed.
- Deliveries are scheduled in the payment wizard.
- Project information auto-fills delivery address values.
- Deliveries can be scheduled for a specific time window in addition to a date.



The screenshot shows the 'Checkout' screen with a 'Schedule Delivery' dialog box open. The dialog box contains the following fields:

- 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

Blue arrows point to the 'Duration', 'Delivery Date', and 'Phone' fields. The 'Next >>' button is at the bottom right of the dialog box.

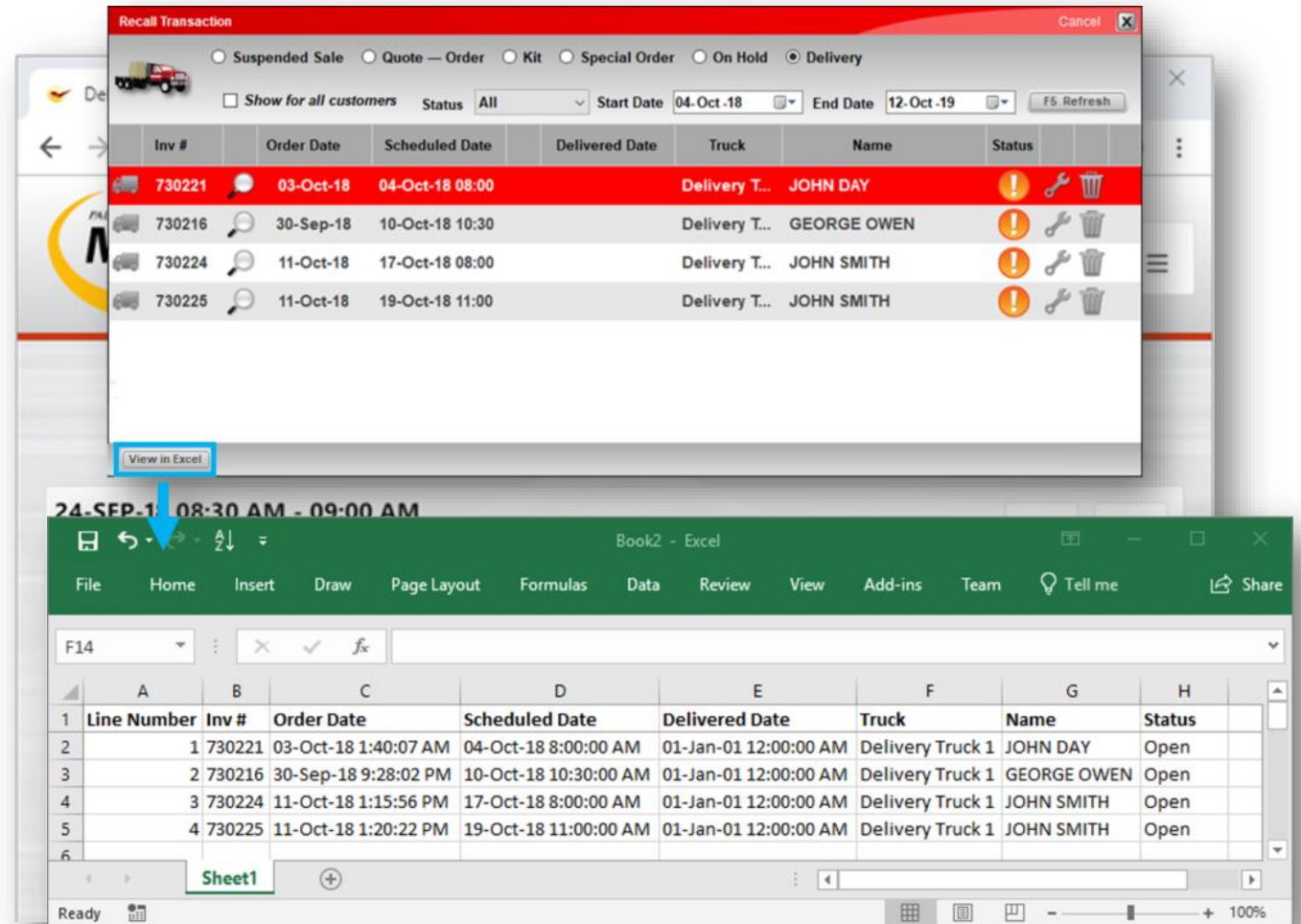
The background shows the 'Checkout' screen with the following information:

- Customer:** JOHN SMITH
- Address 2:** Small Town, NE, 00000
- Phone:** 1231231234
- Payment Type:** Charge
- Amount:** \$ 1,390.72
- CHANGE DUE:** \$ 0.00
- Subtotal:** \$ 1,312.00
- Tax:** \$ 78.72
- Total:** \$ 1,390.72

The bottom navigation bar includes icons for Cash, Charge, Credit Card, Check, Coupon, Store Transaction, Print Quote, Tax, and Schedule Delivery (highlighted with a red box).

Mobile2Deliver™ – Using Mobile Device on Delivery

- You can attach the invoice to the customer's automated delivery notification email.
- View deliveries on the mobile device sorted by date and time
- Watch the status change as deliveries are made.
- View the delivery scheduler and detailed report.



The screenshot displays the Mobile2Deliver application interface. The top window, titled 'Recall Transaction', shows a list of delivery transactions. Below it, an Excel spreadsheet is open, displaying a detailed report of the same transactions. A blue arrow points from the 'View in Excel' button in the application to the Excel spreadsheet.

Recall Transaction Window Data:

Inv #	Order Date	Scheduled Date	Delivered Date	Truck	Name	Status
730221	03-Oct-18	04-Oct-18 08:00		Delivery T...	JOHN DAY	!
730216	30-Sep-18	10-Oct-18 10:30		Delivery T...	GEORGE OWEN	!
730224	11-Oct-18	17-Oct-18 08:00		Delivery T...	JOHN SMITH	!
730225	11-Oct-18	19-Oct-18 11:00		Delivery T...	JOHN SMITH	!

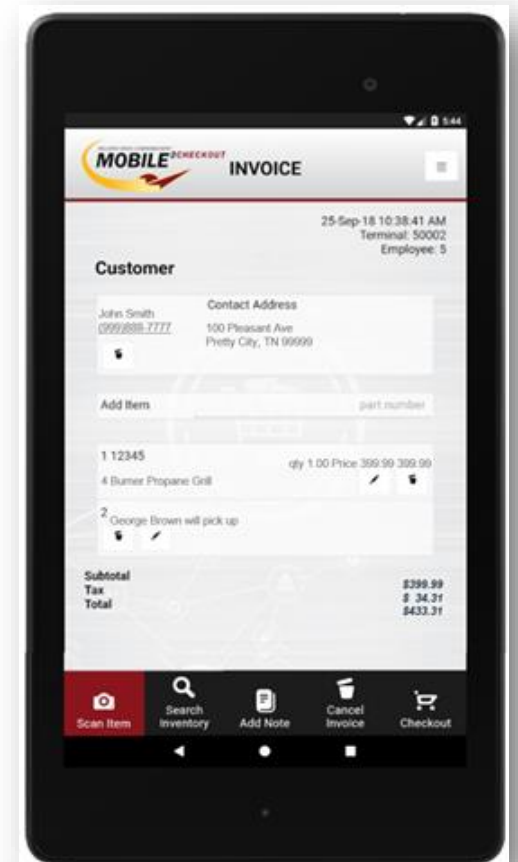
Excel Spreadsheet Data (Sheet1):

Line Number	Inv #	Order Date	Scheduled Date	Delivered Date	Truck	Name	Status
1	730221	03-Oct-18 1:40:07 AM	04-Oct-18 8:00:00 AM	01-Jan-01 12:00:00 AM	Delivery Truck 1	JOHN DAY	Open
2	730216	30-Sep-18 9:28:02 PM	10-Oct-18 10:30:00 AM	01-Jan-01 12:00:00 AM	Delivery Truck 1	GEORGE OWEN	Open
3	730224	11-Oct-18 1:15:56 PM	17-Oct-18 8:00:00 AM	01-Jan-01 12:00:00 AM	Delivery Truck 1	JOHN SMITH	Open
4	730225	11-Oct-18 1:20:22 PM	19-Oct-18 11:00:00 AM	01-Jan-01 12:00:00 AM	Delivery Truck 1	JOHN SMITH	Open

Mobile2Checkout™

The Mobile2Checkout app supports these invoicing features:

- Add a customer from your Paladin customer database
- Scan/add items using the camera on your device
- Search for and add items from your Paladin inventory database
- Add items manually by part number
- Modify an invoice item's quantity and price
- Add invoice notes
- Accept cash, credit card and charge payments/calculate sales tax
- Process item returns
- Store transactions for later processing



Accounts Receivable

- Either generate statements to the printer or email them automatically to specific accounts.
- Include detailed transaction reports behind the statements.
- Generate transaction reports by project/job.
- Customize to each account for features like prompt payment discounts, service charges, past due hold, etc.

ACE HARDWARE
1405 S MAIN STREET
CORNIN KY 40701
606-528-2175

STATEMENT DATE: 25-Sep-16
ACCOUNT NUMBER: 2
PAGE NO: 1

TO: JAMES ALEX
233 N JACKSON PLACE
P.O. BOX 124
MEMPHIS, TN 38103

**Statement
Of Account**

STATEMENT DATE: 25-Sep-16
ACCOUNT NUMBER: 2

TO ENSURE PROPER CREDIT TO YOUR ACCOUNT ALWAYS RETURN THIS PORTION OF THE STATEMENT WITH YOUR PAYMENT

ALL PURCHASES ARE DUE AND PAYABLE BY 10th OF MONTH FOLLOWING PURCHASE

DATE	INVOICE	DESCRIPTION	AMOUNT	BALANCE
04-Jul-16	105	OPENING BALANCE	327.50	327.50
22-Aug-16	108	FRED JACKSON NEIGHBORHOOD SHOW	354.70 308.90	682.20 991.10

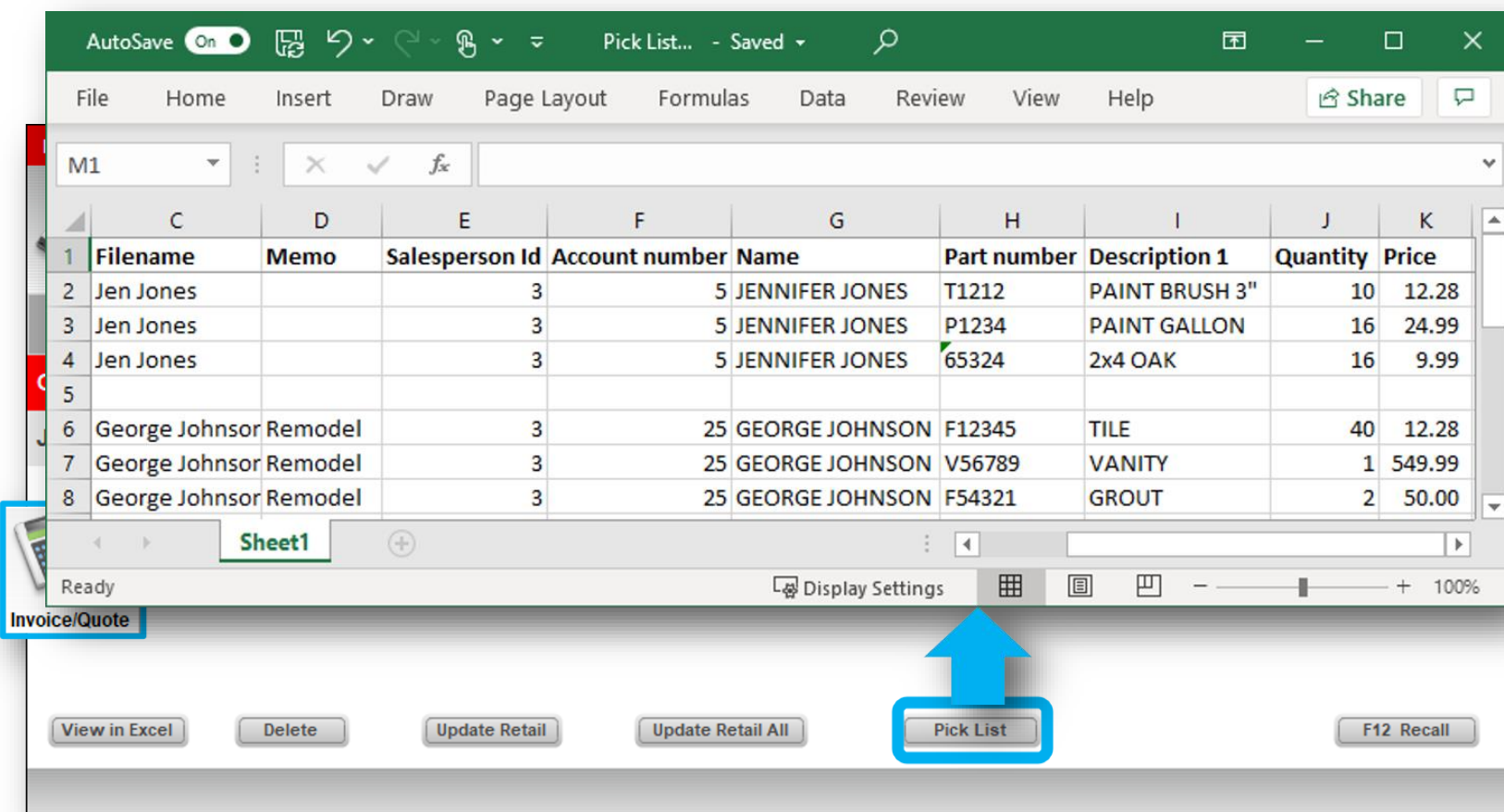
CURRENT AMT. DUE	PAST DUE 1 MONTH	PAST DUE 2 MONTHS	PAST DUE 3 MONTHS	TOTAL DUE
663.60	327.50	0.00	0.00	991.10

PLEASE PAY THIS AMT
TOTAL > 991.10

YOUR RECEIPT GUARANTEES YOUR NO-HASSLE-RETURN.

Coming Soon – Pick List Report

- Show outstanding (unsold) items on orders, sorted by order.
- Useful for fulfillment.



The screenshot displays a software interface with a data table and a 'Pick List' button. The table has columns for Filename, Memo, Salesperson Id, Account number, Name, Part number, Description 1, Quantity, and Price. The data is organized into rows, with some rows grouped by Salesperson Id and Account number. A blue arrow points to the 'Pick List' button at the bottom of the interface.

	C	D	E	F	G	H	I	J	K
	Filename	Memo	Salesperson Id	Account number	Name	Part number	Description 1	Quantity	Price
1	Jen Jones		3	5	JENNIFER JONES	T1212	PAINT BRUSH 3"	10	12.28
2	Jen Jones		3	5	JENNIFER JONES	P1234	PAINT GALLON	16	24.99
3	Jen Jones		3	5	JENNIFER JONES	65324	2x4 OAK	16	9.99
4									
5	George Johnson	Remodel	3	25	GEORGE JOHNSON	F12345	TILE	40	12.28
6	George Johnson	Remodel	3	25	GEORGE JOHNSON	V56789	VANITY	1	549.99
7	George Johnson	Remodel	3	25	GEORGE JOHNSON	F54321	GROUT	2	50.00
8									

Ready | Display Settings | 100%

View in Excel | Delete | Update Retail | Update Retail All | **Pick List** | F12 Recall

Learn More

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

- [About Profit Analyst](#)
- [About special orders](#)
- [About the Footage Calculators](#)
- [About customer projects](#)
- <https://portal.paladinpos.com/knowledge-base/about-mobile2deliver/>
- [How to view item inventory costs and prices by MBF, MSF, or ton](#)
- [How to create a cheat code for a lumber item](#)
- [Overview: Turn quotes into orders with Order Manager](#)
- [How to use the Mobile2Checkout app on an Android device](#)
- [How to set the minimum margin for a department](#)

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

Q+A

Next Webinar:

2021 Sales Tax Update with Avalara

March 9 @ 9am PT

Register: portal.paladinpos.com/webinars



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