



EXCELLENCE IN COACHING

New Feature: Mobile2Deliver

by Chad Klein

Technical Level:

Easy

Intermediate

Advanced





EXCELLENCE IN COACHING:



New Paladin Feature: **MOBILE²DELIVER**

Agenda



- What is Mobile2Deliver?
- How to schedule a delivery in Paladin POS
- How to view and edit an existing delivery
- How to use Mobile2Deliver in the field
- How to track a completed delivery



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New Paladin Feature: **MOBILE²DELIVER**

What is **MOBILE²DELIVER**



- Web application for mobile devices
- Schedule and track deliveries electronically
- Accept electronic signatures on mobile devices
- Make edits (notes and quantity adjustments) to an existing delivery
- Take photos of delivery
- Application is accessible on any web-enabled device

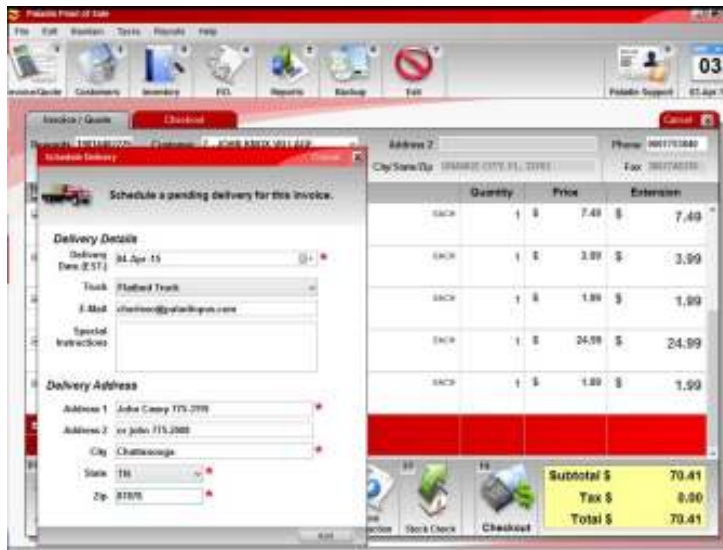


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How to schedule a delivery



1. Open Paladin Point of Sale.
2. On the top ribbon, click the **Invoice/Quote** module.
3. In the **Invoice / Quote** tab, in the **Customers** list, select an existing customer with an address.
4. Add all items to be included for delivery.
5. On the bottom ribbon, click **Schedule Delivery** or press F5.
6. In the **Schedule Delivery** pane, enter information for **Delivery Details** and **Delivery Address**.
5. Click **Add**.
6. On the bottom ribbon, click **Checkout**.

Note: For more detailed information, see the following Knowledge Base article: [How to manage deliveries in Paladin Mobile2Deliver.](#)

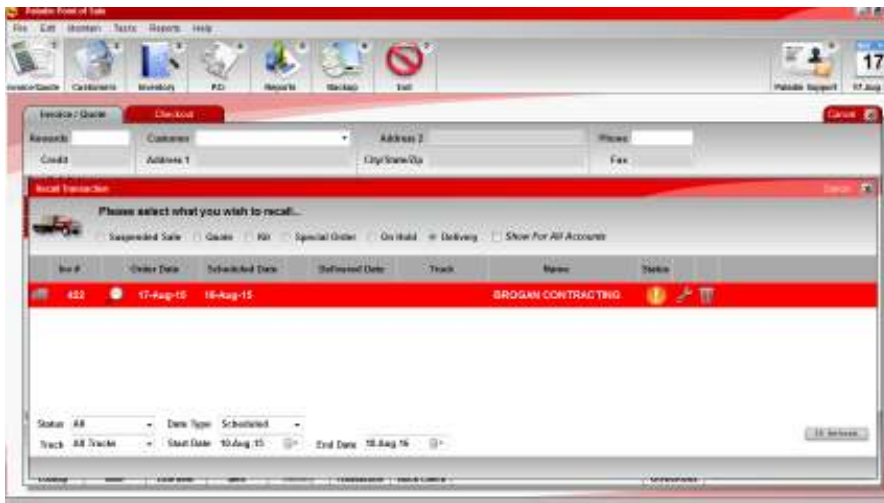


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How to view and edit a delivery



1. Open Paladin Point of Sale.
2. On the top ribbon, click the **Invoice/Quote** module.
3. On the bottom ribbon, click **Recall Transaction** or press F6.
4. Select **Delivery** to show a list of deliveries.
5. The following options are now available:
 - **Edit Delivery**
 - **Cancel Delivery**
 - **Delivery Details**
 - **Order Invoice**
 - **Refresh**



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How to use Mobile2Deliver in the field



1. Open the Mobile2Deliver application on a web-enabled device.
2. Select a store.
3. Select a specific **Truck** or select **All Trucks**.
4. Select a **Delivery Date** and a **Delivery**.
5. You will see 5 screens for each delivery:
 - **Invoice**
 - **Delivery items**
 - **Photos**
 - **Notes**
 - **Signature**



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How to track a completed delivery

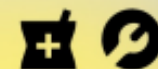


1. Open Paladin Point of Sale.
2. On the top ribbon, click the **Invoice/Quote** module.
3. On the bottom ribbon, click **F6 Recall Transaction** or press F6.
4. Select **Delivery** to show a list of deliveries.
5. Select a delivery, and then click **Delivery Details**.
6. If the delivery is completed, the **Delivery Status** will be **Delivered**. Notes and photos will also appear in **Delivery Details**.

Note: Paladin Point of Sale automatically creates and saves a delivery invoice with the added notes and signature.



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End

Recording available at:
paladinpointofsale.com/webinars



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