

PALADIN DATA CORPORATION™

Biz Coach Webinars

FREE ADVANCED TRAINING



THE MIGHT F6 KEY

Chad Klein



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



The Mighty F6 Key

Agenda



- Suspended Sale
- Quote
- Kit
- Special Order
- On Hold
- Delivery



The Mighty F6 Key

Suspended Sale



- Suspending a sale will temporarily set an unfinished invoice aside to allow you to check out other customers until you need to finish the suspended one.

- It is typically used for when a customer steps away for a phone call, continues shopping for more items, or has left their wallet in their car and need to go get it to complete the transaction.
 - Terminal Specific
 - Can only suspend one at a time per terminal
 - Very Temporary - If you re-start paladin any suspended sales will be permanently deleted.



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Quote

Recall Transaction

Please select what you wish to recall...

Suspended Sale
 Quote
 Kit
 Special Order
 On Hold
 Delivery
 Show For All Accounts

Name

Brogan - House	August House
BROGAN-FENCE	
DEBRA GILL - HOUSE ACCESS...	HOLD FOR PICK UP NEXT MONTH
John Leroyce	John Leroyce
Paladin	Ryan House
test	
testtest	testtest

- A Quote is a permanent storage place for storing bids and projects for a specific customer.
- A Quote will stay forever in the system unless you check them out or manually delete them.
- A Quote will NOT remove the items from your SOH until the quote has been checked out.
- If you do not have a customer pulled up in the Invoice/Quote module you will have to select Show For All Accounts in order to display all the stored quotes.
- Quotes are accessible from any terminal.
- Quotes will display the “quoted” price as well as the current price assuring you never sell an item for less than an intended margin.
- Upon transacting a stored Quote, Paladin will ask if you still wish to save this quote, or if you wish it to be deleted. You would select no if this a group of items always purchased by this customer, so we can quickly sell it to them again.



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Kit



- A Kit is a group of items that are sold together, traditionally at a discounted price.
- An example would be a gift basket containing items you sell individually, but when purchased as a “Kit” they come up quickly by scanning the “Trigger Kit” item at the correct kit price.
- They are very flexible and capable of being manipulated to fit your specific needs.
- To learn more about Kits watch our two-part webinar series titles “All About That Kit” parts 1 & 2.



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Special Order



- Saving an invoice as a Special Order allows you to save a transaction until you receive the goods into your store. Once you have received them you can quickly interact with the original stored Special Order Invoice to finish the transaction.
- Saving an invoice as a Special Order will automatically create a corresponding Purchase Order that you can use to send and receive the items into inventory
- You can have Paladin automatically take a deposit on a Special Order.
- Paladin also allows you to add a new customer to the system on the fly when saving a ticket as a Special Order, as we probably shouldn't be ordering goods unless we know who is going to be paying for them.
- For more information on Special Orders see the two part webinar series "Special Orders Made Easy".



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On Hold



- The On Hold option is a permanent storage place for saving unfinished transactions.
- An On Hold invoice will stay forever in the system until you check them out or manually delete them.
- An On Hold invoice **WILL** remove the items from your SOH so you do not redundantly sell them to a different customer
- On Hold tickets are accessible from any terminal.
- On Hold tickets will display the current sale price for that item, which may be different than the time you originally stored it.
- On Hold tickets are great for taking a phone order and making sure that you set those items aside for the customer and not accidentally sell them to someone else in the time it takes the customer to come pick up the goods.



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Delivery



- The Delivery Option allows you to see and interact with any deliveries you have scheduled.

- It is very flexible in how it can display information:
 - By date range
 - By delivery status
 - By Truck

- For more information on the Delivery App and Scheduler in Paladin please see the Webinar: Mobile2Delivery.



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Learn more

For detailed descriptions of these features, click any of the following titles. Or, on the **Help** menu, click **Features and Fixes**, and then search for the title.

You can also find step-by-step procedures for many tasks in our [Knowledge Base](#).
A recording of this webinar will be available at paladinpointofsale.com/webinars.

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