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Master Purchase Orders in PaladinPOS™

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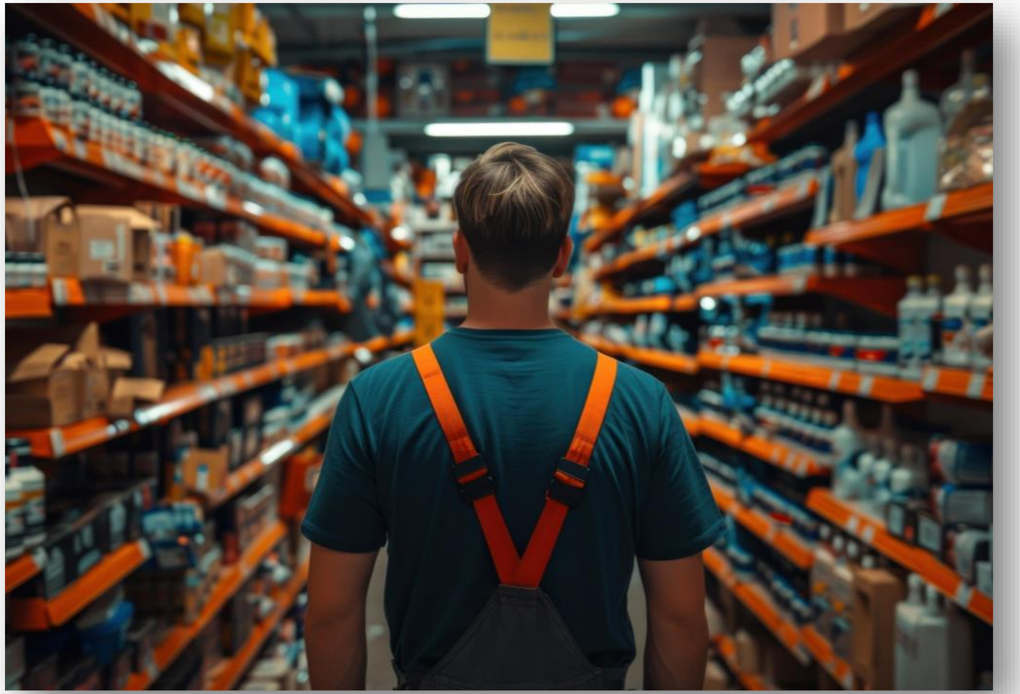
WHAT YOU'LL LEARN

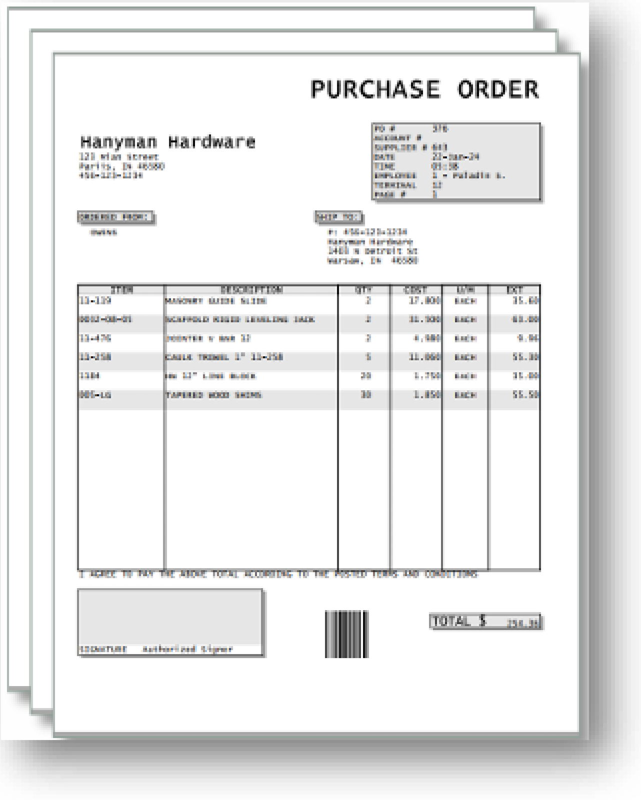
- Advantages of using POs in Paladin.
- The various methods of creating POs
- Creating, confirming, & sending POs
- Recalling and sending a stored PO
- Receiving a manual and EDI POs
- Resending an open PO to suppliers
- Merge stored POs
- Add instructions to POs
- Set up individual costs
- Using the Purchase Order Importer

Advantages of using POs



- Logical, practical, easy and best method for receiving and managing inventory.
- Most effective method for tracking purchases and managing stock on hand.
- Enhances ordering and receiving efficiencies.
- Improves supplier order communications for both EDI and non-EDI vendors.
- More precise and timely costs, margins, and retail pricing.

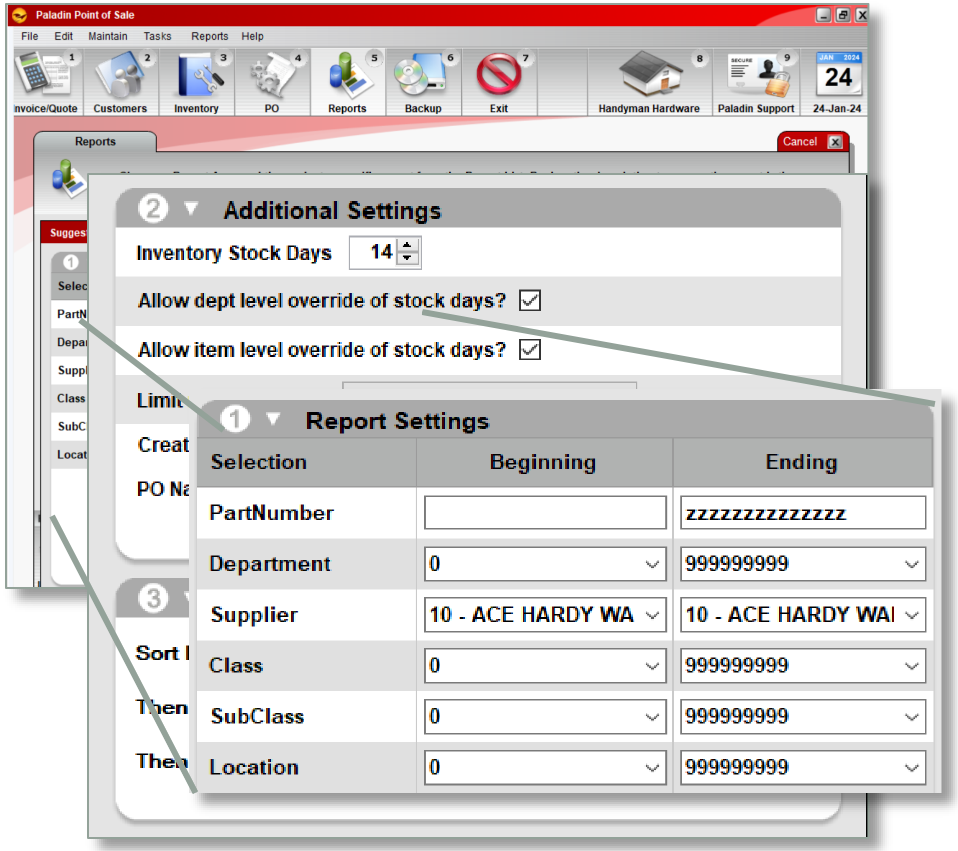
Methods of creating POs



1. **Suggested Order Report** (automated ordering).
2. **Items Sold Report** (replenishment ordering).
3. **RF Gun/Terminal Scanning** (shooting for outs).
4. **Manually entering orders** (want-list ordering).
5. **Special Order PO Creation** (S.O. invoices to PO's).
6. **Invoice/Quote PO Creation** (Convert invoices to PO's).
7. **PO Importing** (Receiving Excel file from suppliers).

Paladin best practices utilize the Suggested Order report.

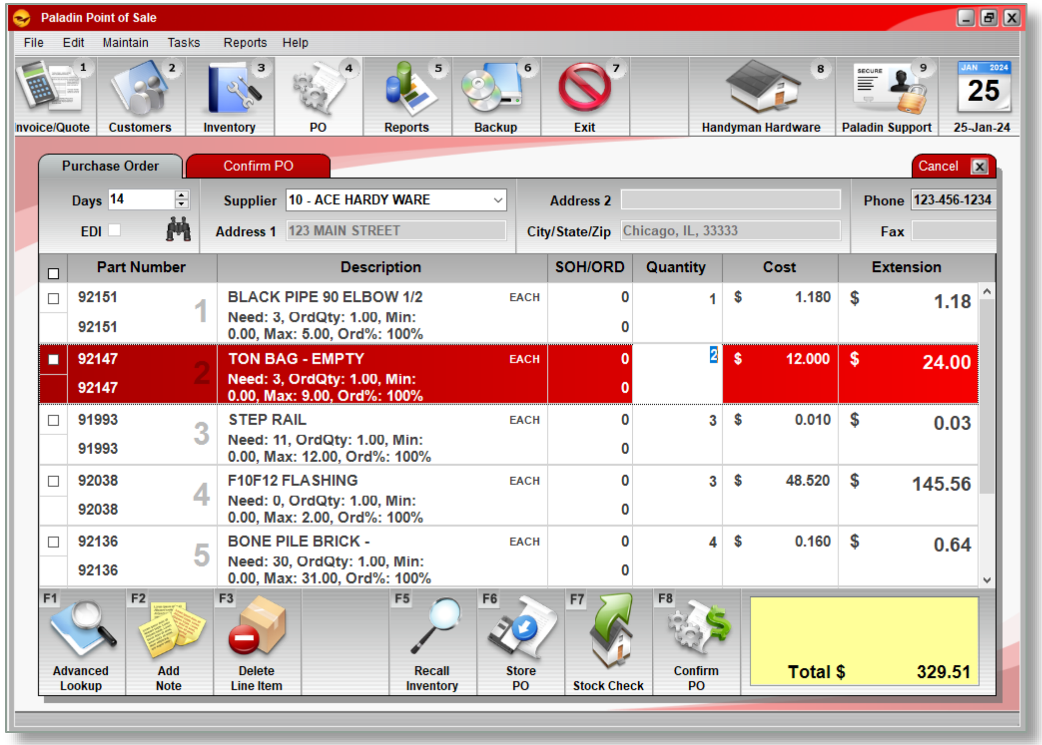
Suggested Order Report PO



Using the **Suggested Order Report**

1. Select **Reports** module.
2. Select **Inventory > Purchase Order.**
3. Select **Suggested Order Report**, click **F12 Next**.
4. In the supplier row, select a **Supplier**.
5. In the **Additional Settings** pane, check [Create working PO(s) from this data].
6. Optionally, enter a **Name** for the purchase order.

Suggest Order Report PO



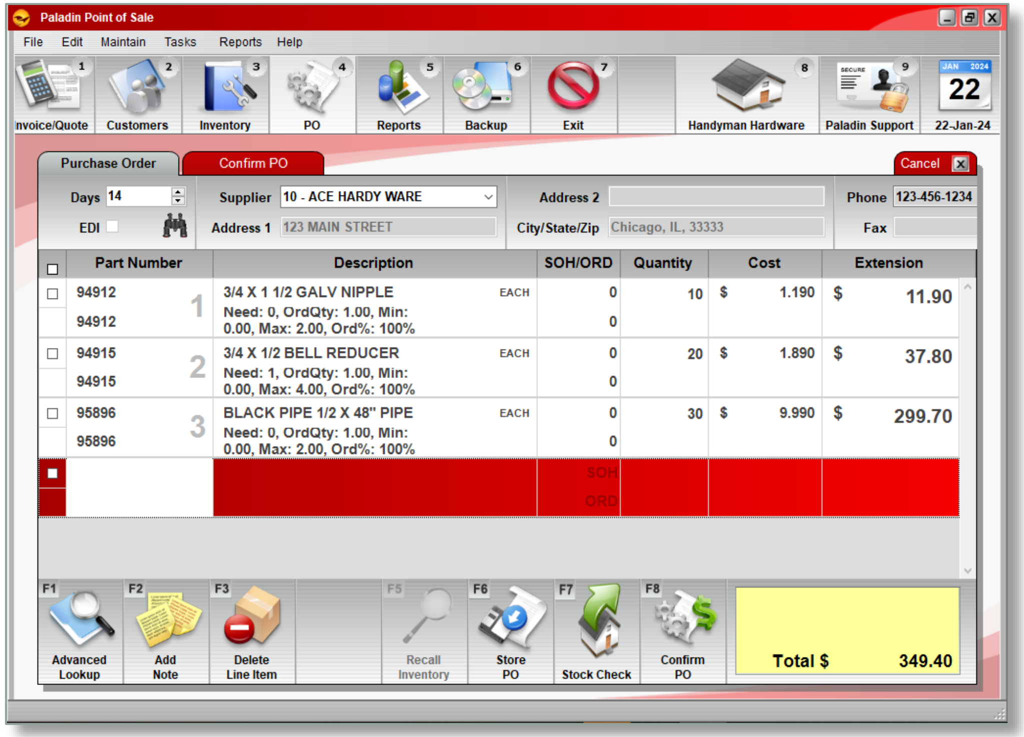
Using the **Suggested Order Report**

7. Select a sort order of choice in the **Sorting Options** pane. We recommend **Extended Cost** in Descending order to push high-dollar items to the top.

8. When you are done, click **F12 Run Report**.
9. The **Suggested Order Report** appears as a PDF and is used to review the items and total cost.
10. When ready, go to the **PO module** to recall, edit, and submit your PO.

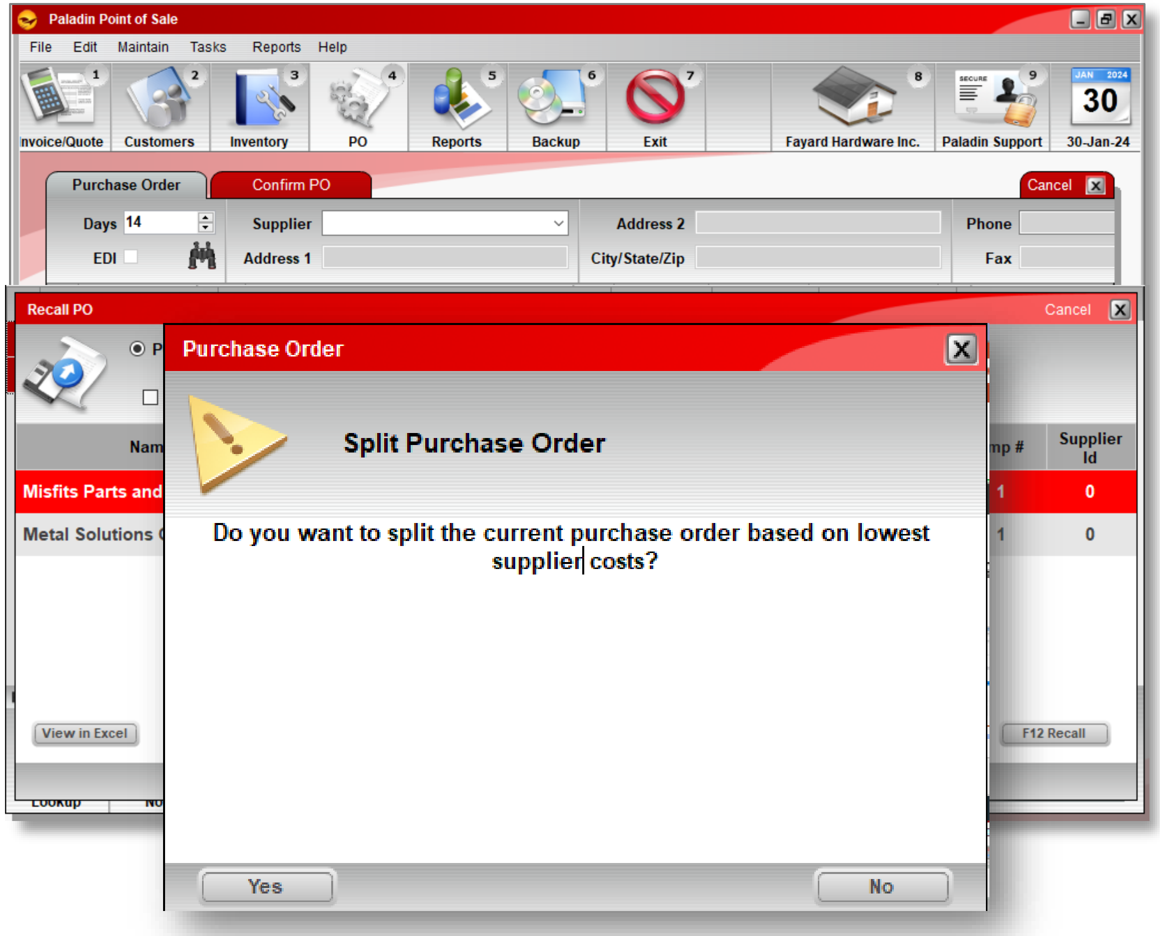
Note: Most EDI suppliers POs will be sorted based on availability of product in the warehouse.

Creating a manual PO



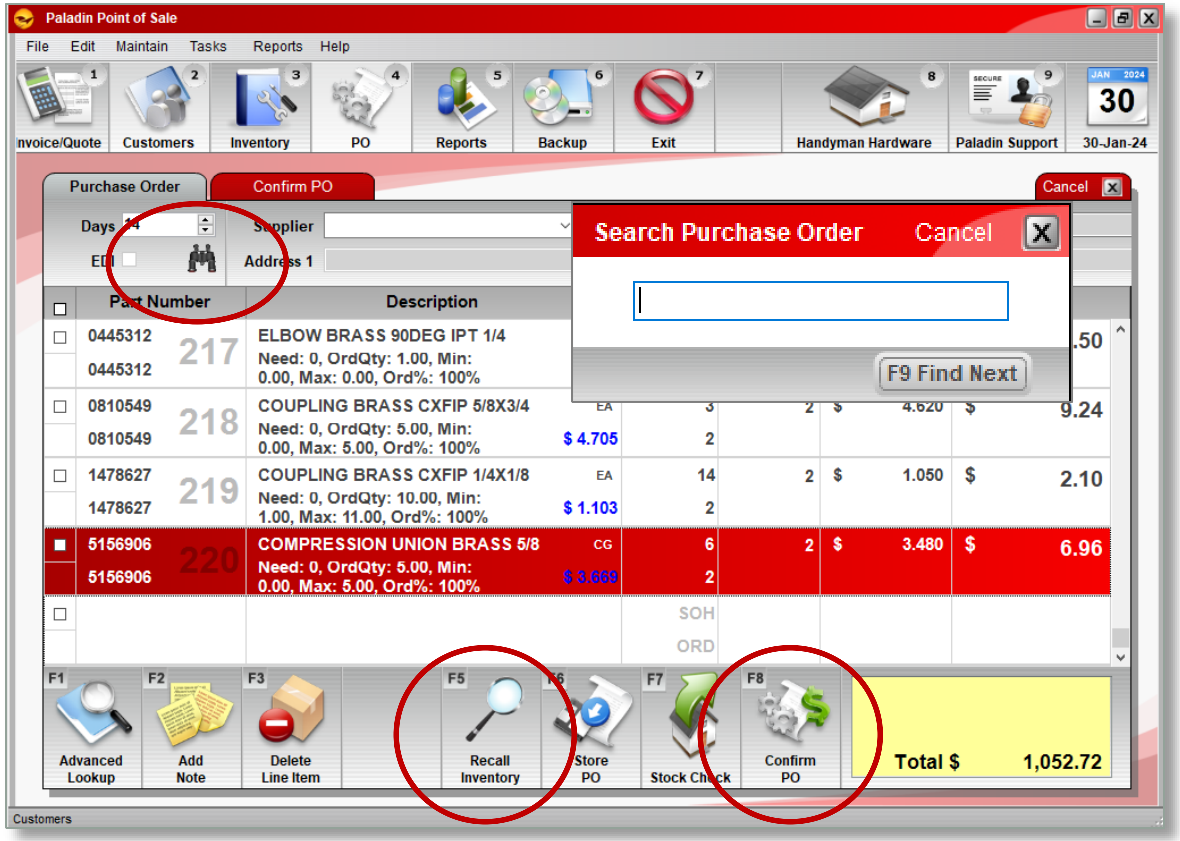
1. Select the **PO** module.
2. Enter or select a supplier from the **Supplier** list.
3. In the **Part Number** box, enter a part number or to search for a part, click **F1 Advanced Lookup**.
4. Select a single or multiple items and adjust the **Quantity** or **Cost** as desired.
5. To add more items, repeat step 3.
6. Press **F6/Store PO** to put the PO on-hold and recall it later to complete the purchase or press **F8/Confirm PO.**

Recalling and sending a stored PO



1. Go into the **PO** module.
2. Press the **F6 Recall** button.
3. Choose a stored PO, press **F12 Recall**.
4. The **Split Purchase Order** dialog box appears when you have not selected a Supplier for your order.
5. This feature is activated if you have more than one supplier each with a separate supplier cost. Otherwise, it defaults to the primary supplier and cost.

Recalling and sending a stored PO



6. The PO line items are displayed.
7. Adjust or modify quantities and/or costs.
8. To search for specific items, press the binoculars icon or **CTRL+F** keys.
9. Additionally, you may jump to any inventory item by highlighting any row and pressing **F5 Recall Inventory.**
10. Next press the **F8 Confirm PO** button and verify the total amount that you are about to receive.

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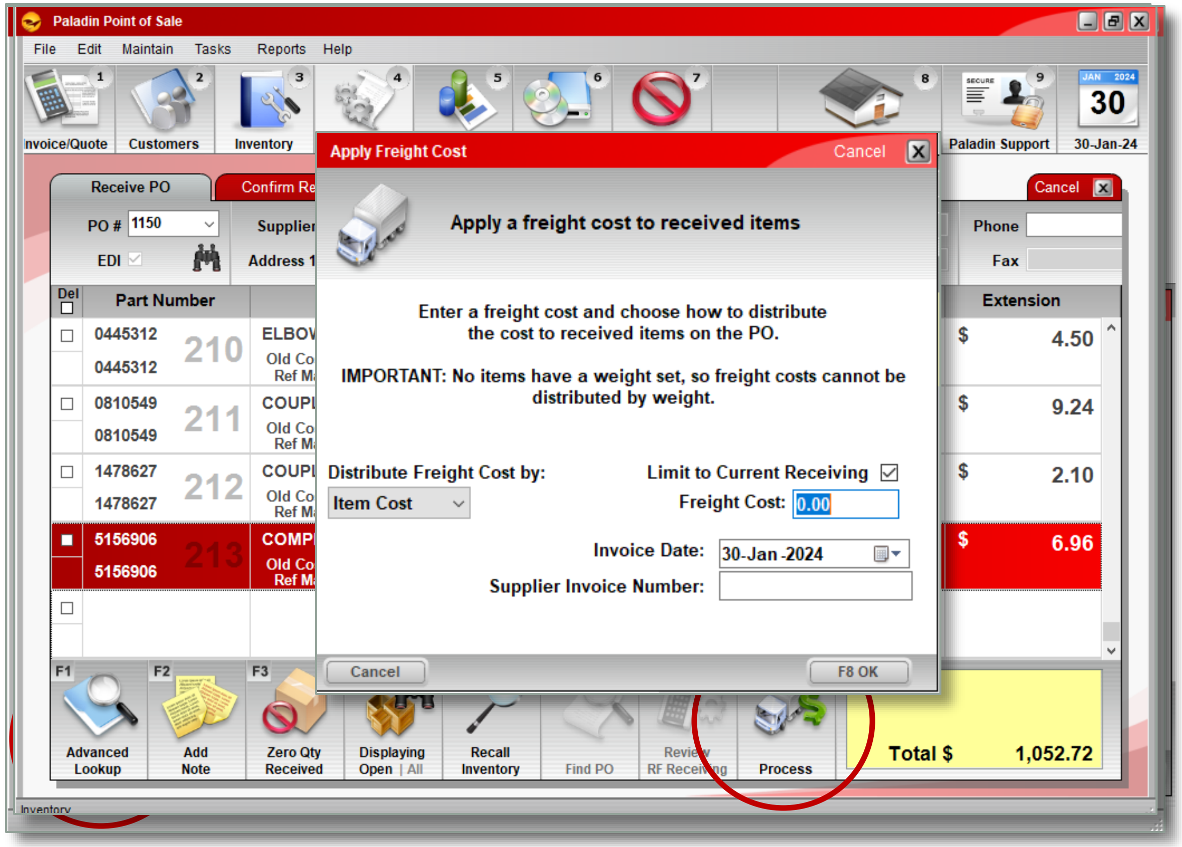
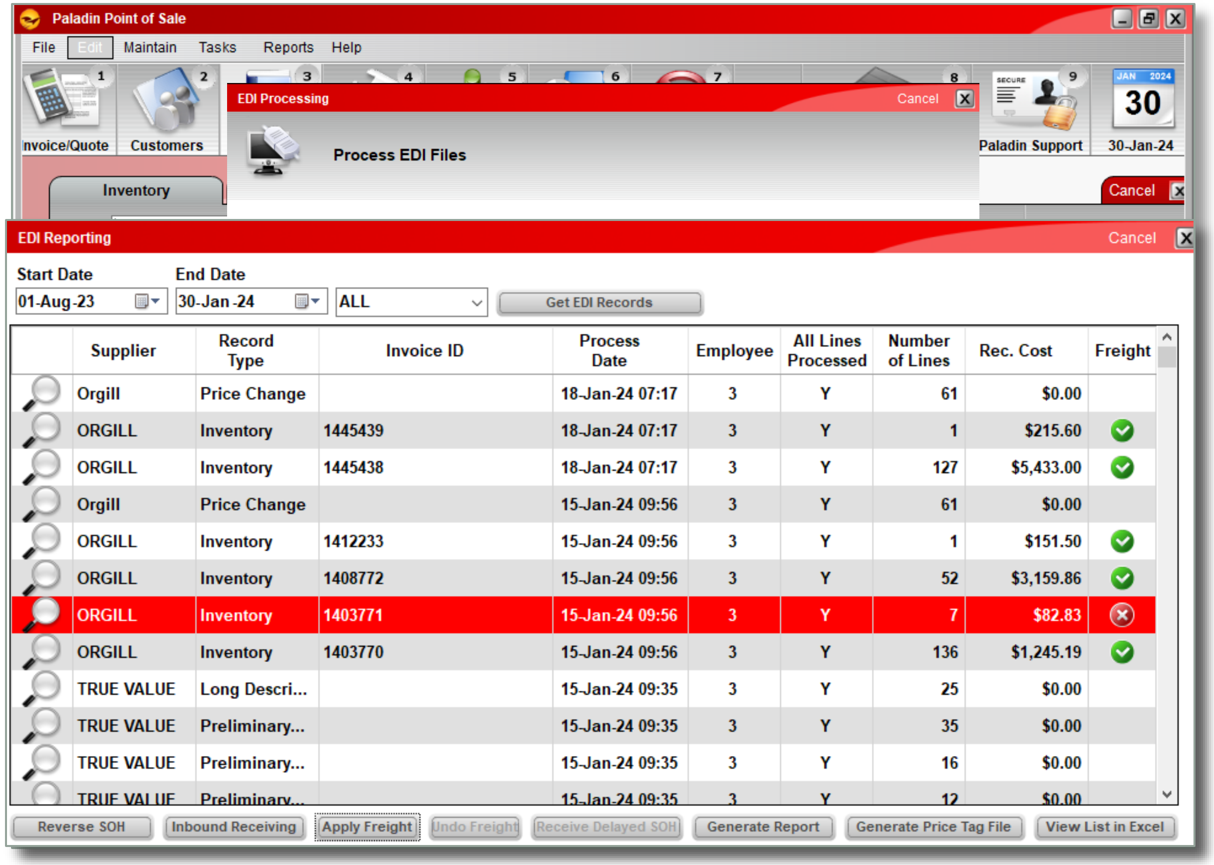
Receiving a manual PO



1. Select the **PO** module, **F5 Receive** PO Mode, and **F6 Find PO.**
2. Select the desired Open PO and press **F12 Open.**
3. Edit the Quantity and Cost as received on your invoice then press **F8 Process**.
4. On the Confirm Receive and Total window, press **F1 Process**.
5. Enter **Freight Cost** if any and press enter.
6. The PO invoice has been received and your quantities and costs have been augmented in inventory as desired.

Receiving an EDI PO



1. Select the **Inventory** module.
2. Select the **F9 EDI**.
3. Select **Download** or **Process EDI file.**
   Note: Each EDI vendors process is slightly different based on features offered by the supplier. See the KBA for instructions.
4. The EDI invoices will be processed.
5. Upon completion, select the **Reporting** button to review your changes to inventory.
6. Under the reporting section you may perform other functions such as, print item tags, apply freight cost, reverse SOH and generate Excel reports.

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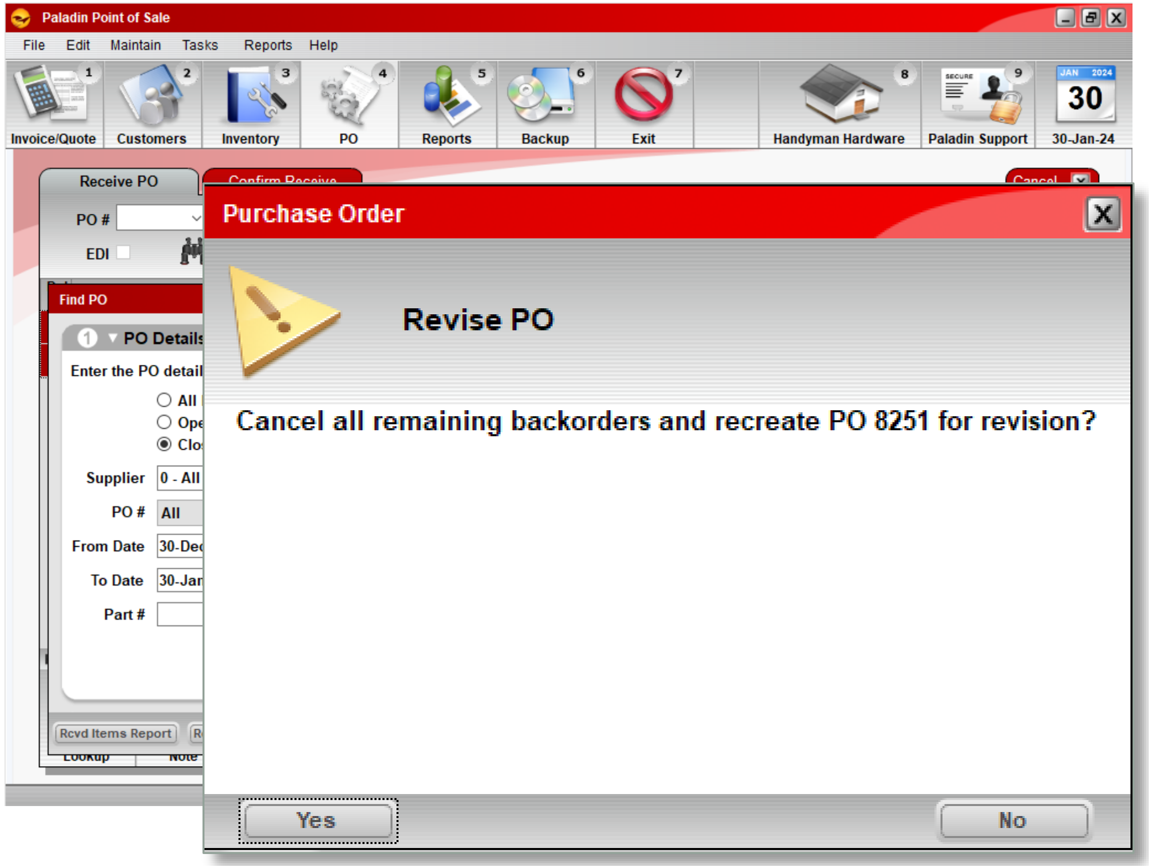
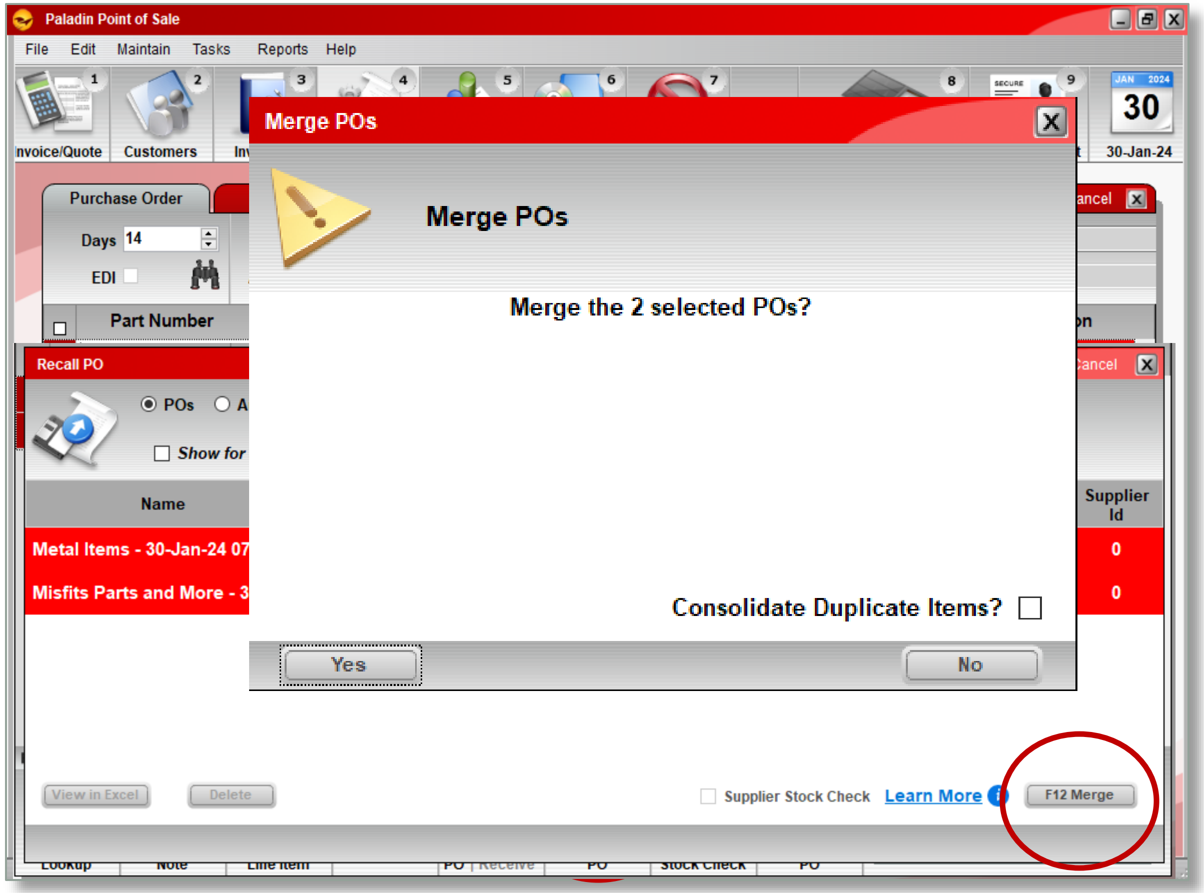
Resending an open PO to suppliers



1. Select **F5 Receive** PO Mode.
2. Select **F6 Find PO.**
3. Highlight the desired Open **PO**.
4. Press the **Revise PO** button on the bottom of the screen.
5. The **Revise PO** confirmation **window** will appear.
6. A new Purchase Order will be created, and all backordered items will be removed.

Merge stored PO’s



1. Select the **PO** module.
2. On the bottom ribbon of the module, select **F6 Recall PO**.
3. In the **Recall PO** window, select purchase orders that you want to merge by highlighting them.
4. Once you highlight more than one PO the Merge button will appear in the bottom right-hand corner of the screen.
   - To select purchase orders individually, hold down the **Ctrl** key and click on the purchase orders you want to merge.

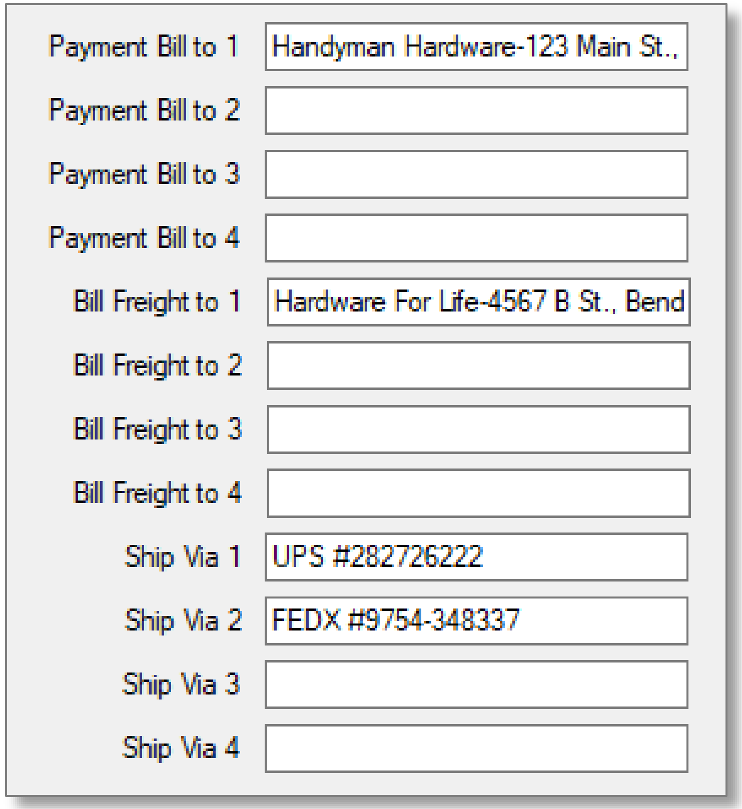
Note: Only purchase orders from the same supplier can be merged. If you try to merge purchase orders from different suppliers, a warning box will appear.

Adding instructions to a PO

There are three steps to setting up and applying PO instructions:

1. Creating the various instructions.
2. Applying instructions to specific suppliers.
3. Adding instructions to the purchase order.

Creating the various instructions



Purchase order supplier instructions can be added for: **Payment Bill To**, **Bill Freight To**, and **Ship Via.** Four per category are allowed.

To create the instructions:

1. From the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. In the **Purchase Orders** pane, enter instructions in each associated box.
4. Click **Save**, then click **Close**.
5. Close and restart Paladin.

Note: If not all instructions are needed, any of the boxes can be left blank.

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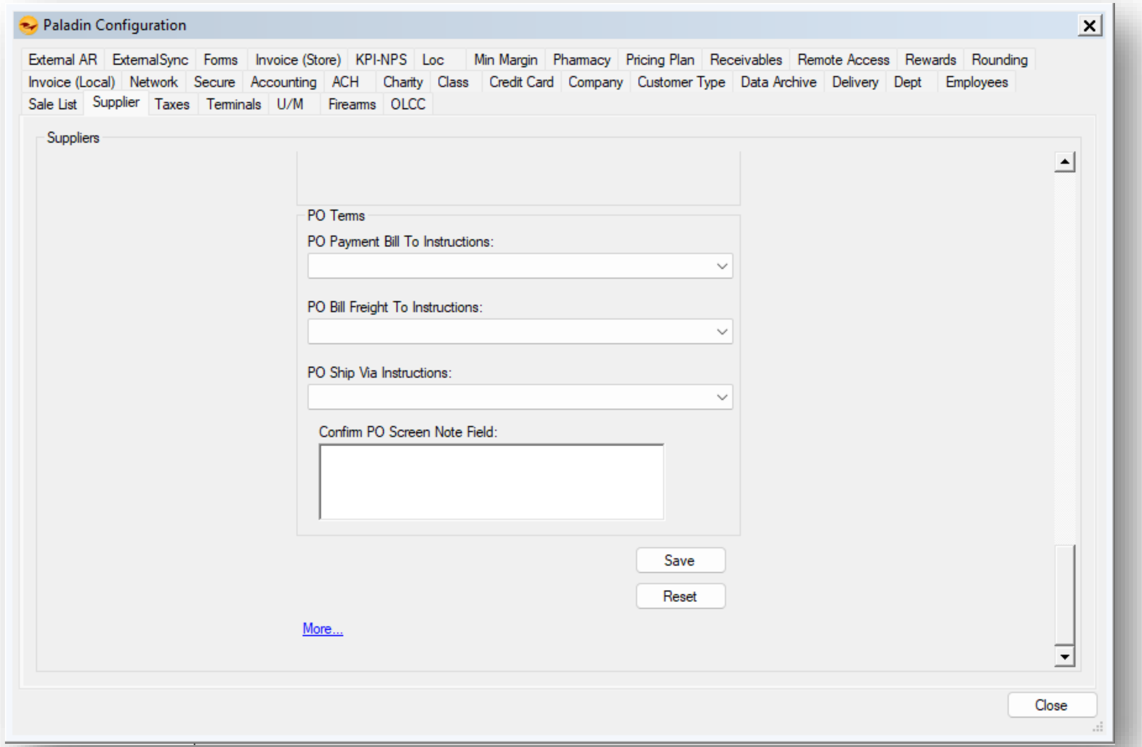
Applying instructions to specific suppliers



To assign specific instructions to a supplier's vendor profile:

1. From the main menu, select **File > Setup**.
2. Select the **Supplier** tab.
3. In the **PO Terms** pane, purchase order instructions that were set in the **Company** tab can now be selected from the lists:
   - **PO Payment Bill To Instructions:**
   - **PO Bill Freight To Instructions:**
   - **PO Ship Via Instructions:**

Note: Purchase order supplier instructions are optional and do not need to be set for every supplier.

4. Click **Save**, then click **Close**.

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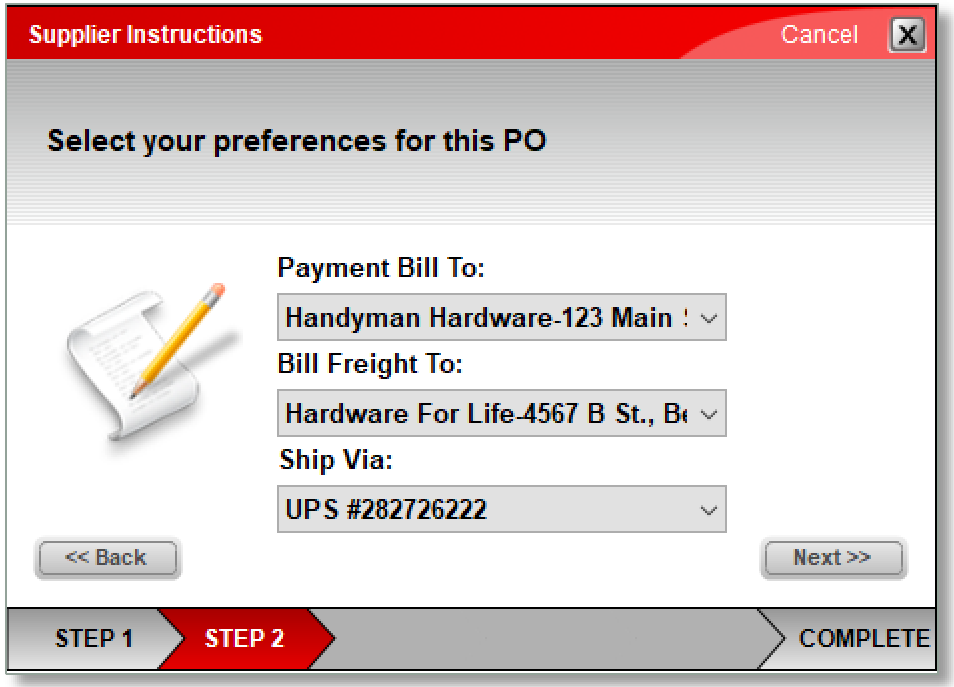
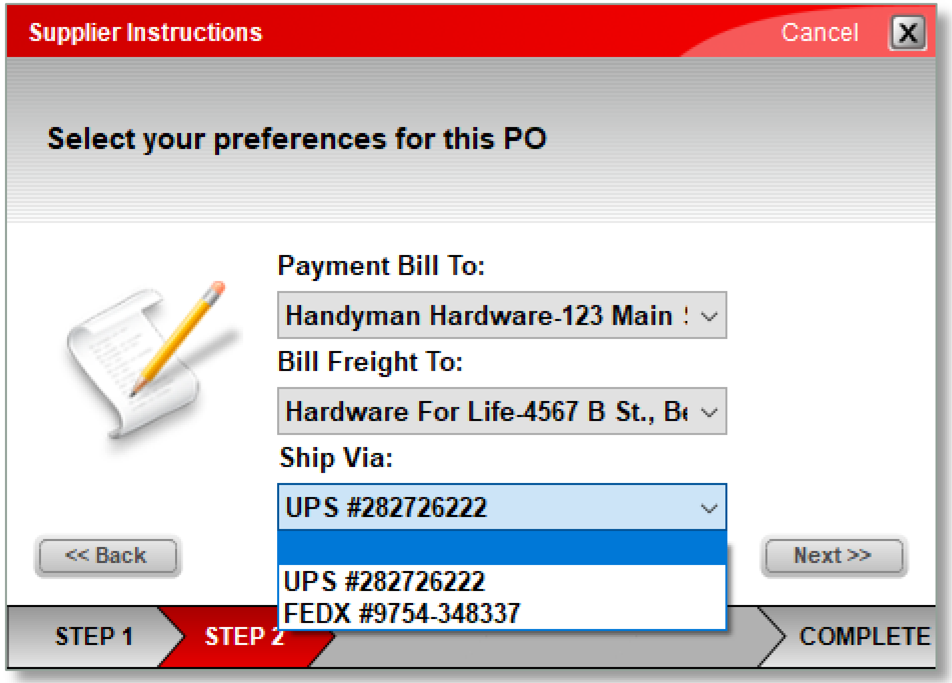
Adding instructions to purchase orders



To add instructions in a purchase order:

1. On the top ribbon, select the **PO** module.
2. Enter or select a supplier from the **Supplier** list.
3. Add items to the purchase order, then click **F8 Confirm PO**.
4. Click **F1 Buy**.
5. Optionally, in the **PO Number** window, enter a **PO Number** or leave blank.
6. Default instructions will be auto-filled in.

How to change supplier instructions



To change purchase order instructions in a purchase order:

1. In the **Supplier Instructions** window, use the dropdown buttons to select a different **Payment Bill To, Bill Freight To, or Ship Via** instruction.

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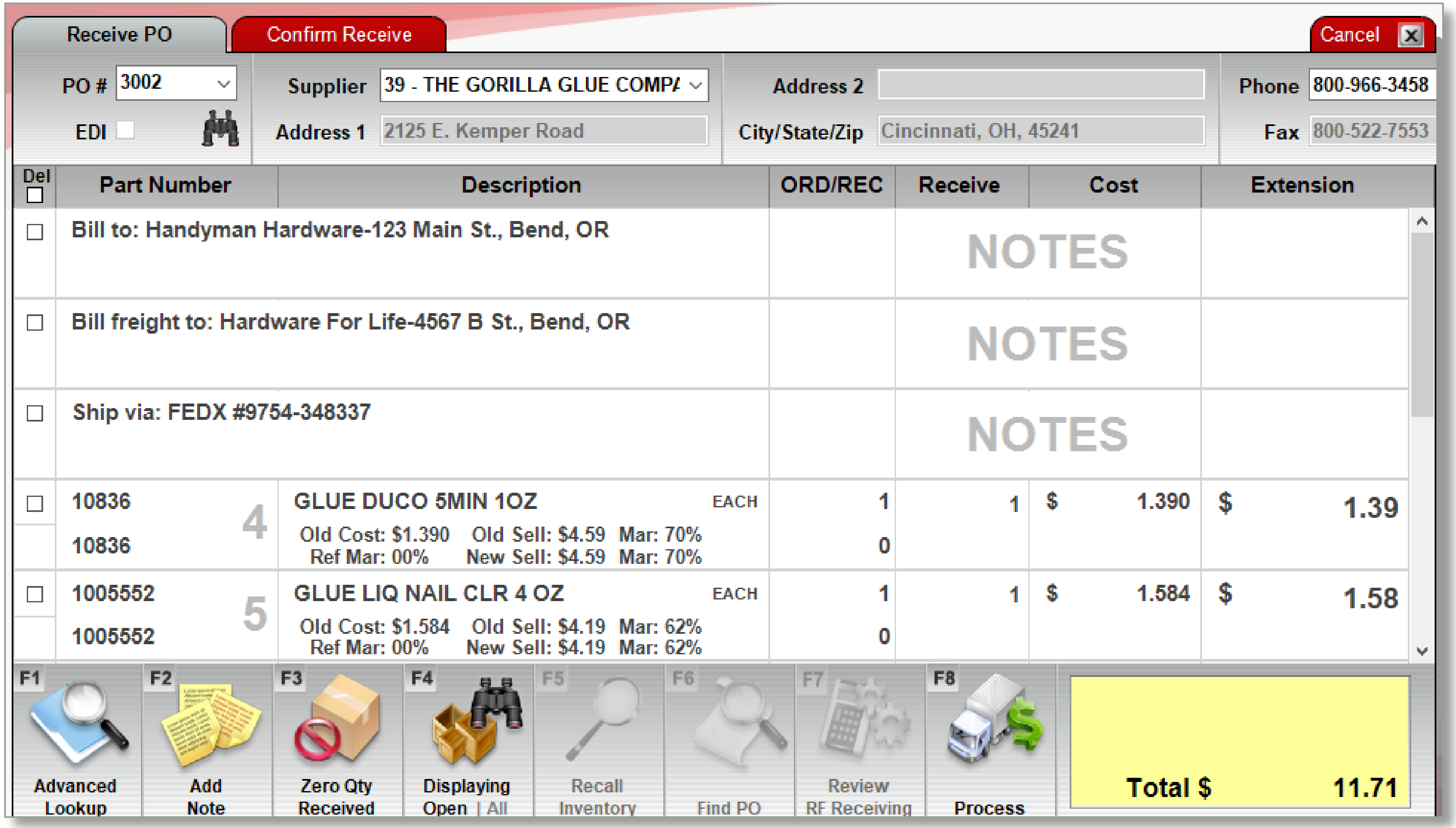
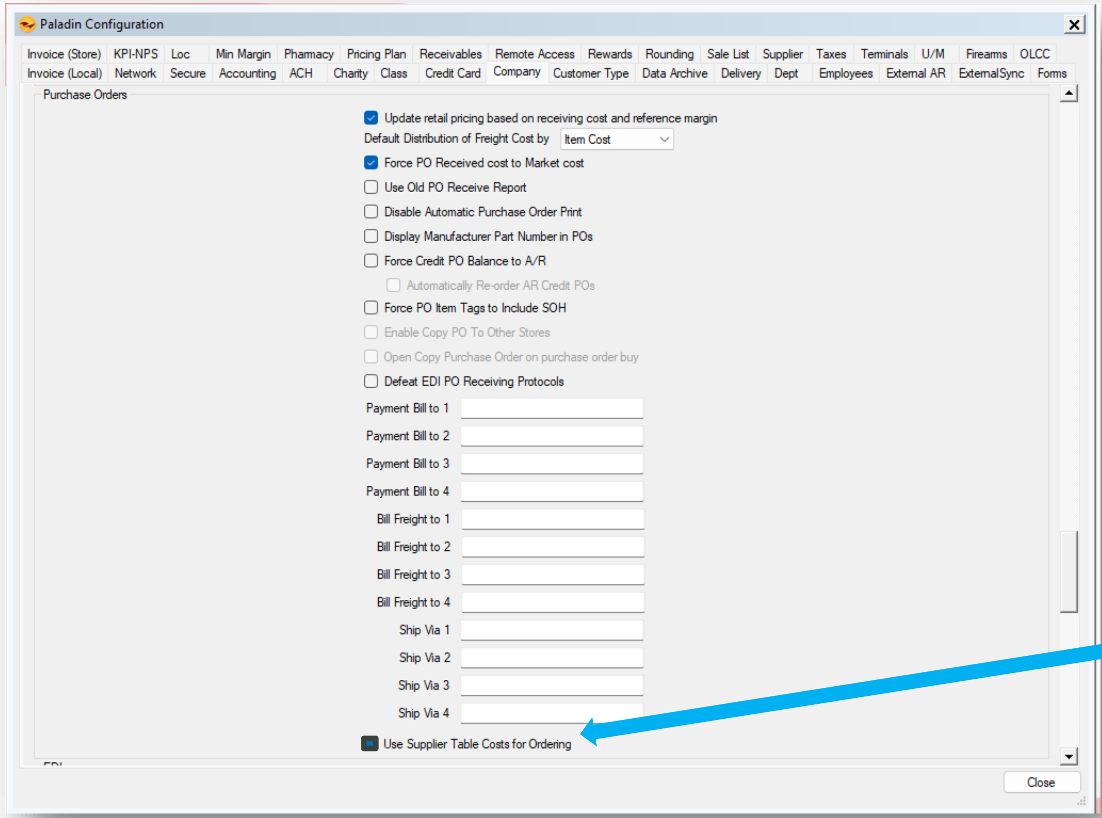
How instructions are displayed on the purchase order



Set up individual supplier costs for items on POs

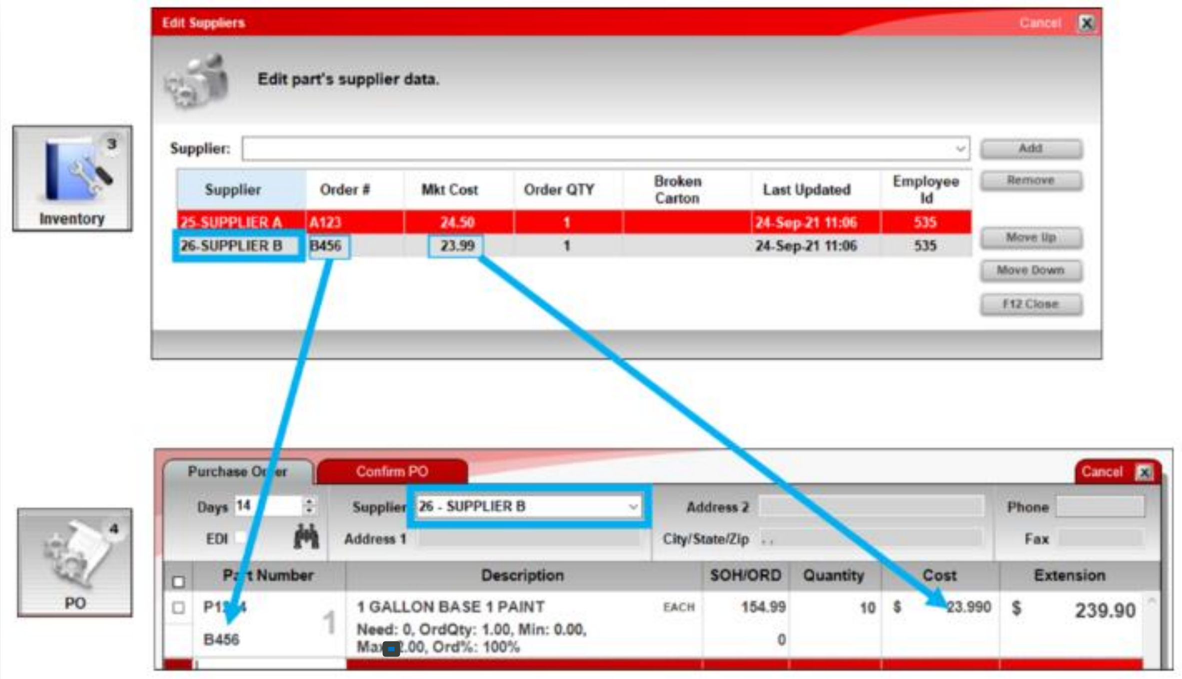


- When this feature is turned on, these supplier costs are used for purchase orders instead of the default market cost.

How to turn on the supplier cost feature:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. On the bottom of the **Purchase Orders** pane, check **Use Supplier Table Costs for Ordering**.
4. Click **Save**, then click **Close**.

Apply supplier costs during ordering



1. In Paladin, on the top ribbon, select the **PO** module.
2. Enter or select the supplier from the **Supplier** list.
3. Add an item to the purchase order.

If a supplier cost is a defined cost for this supplier, it will be used as the item cost.

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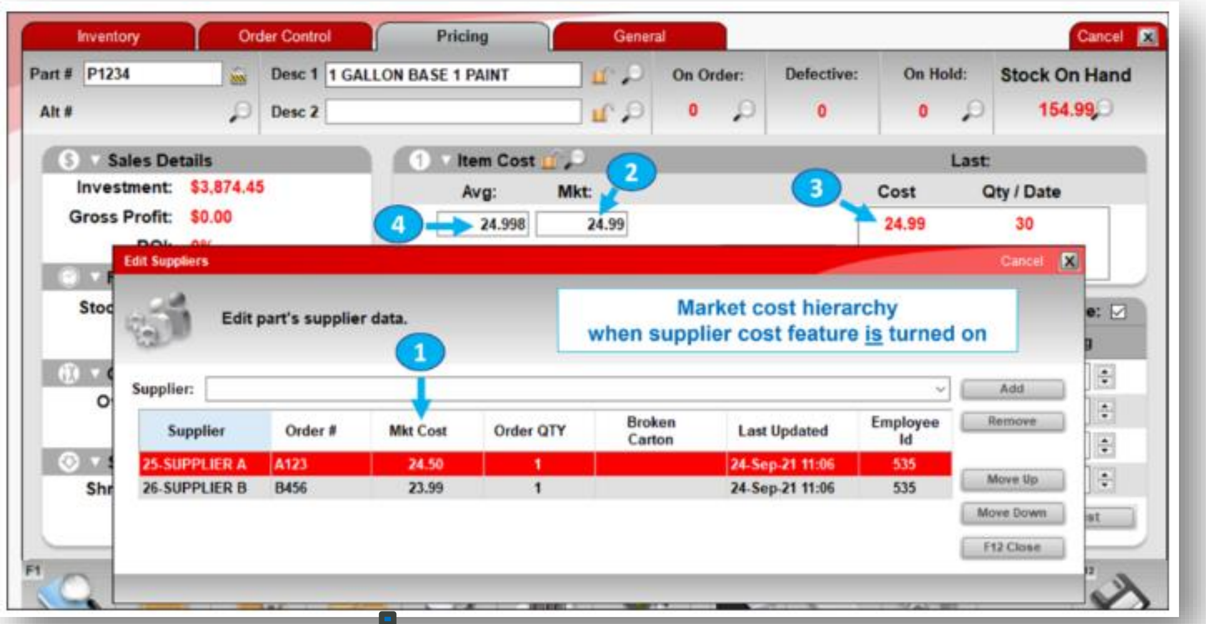
Apply supplier costs during ordering



If a **Supplier Market Cost (1)** is not defined or is zero, the default cost is used. The default cost is set to the first non-zero value in this list of values on the **Pricing** tab in the **Item Cost** pane:

Mkt cost (2) – **Last Cost (3)** – **Avg cost (4)**

4. Click **F1 Process**, then click **F1 Buy** to complete the purchase order.

Note: If you change suppliers after you've added items to the purchase order, costs will adjust to the current supplier.

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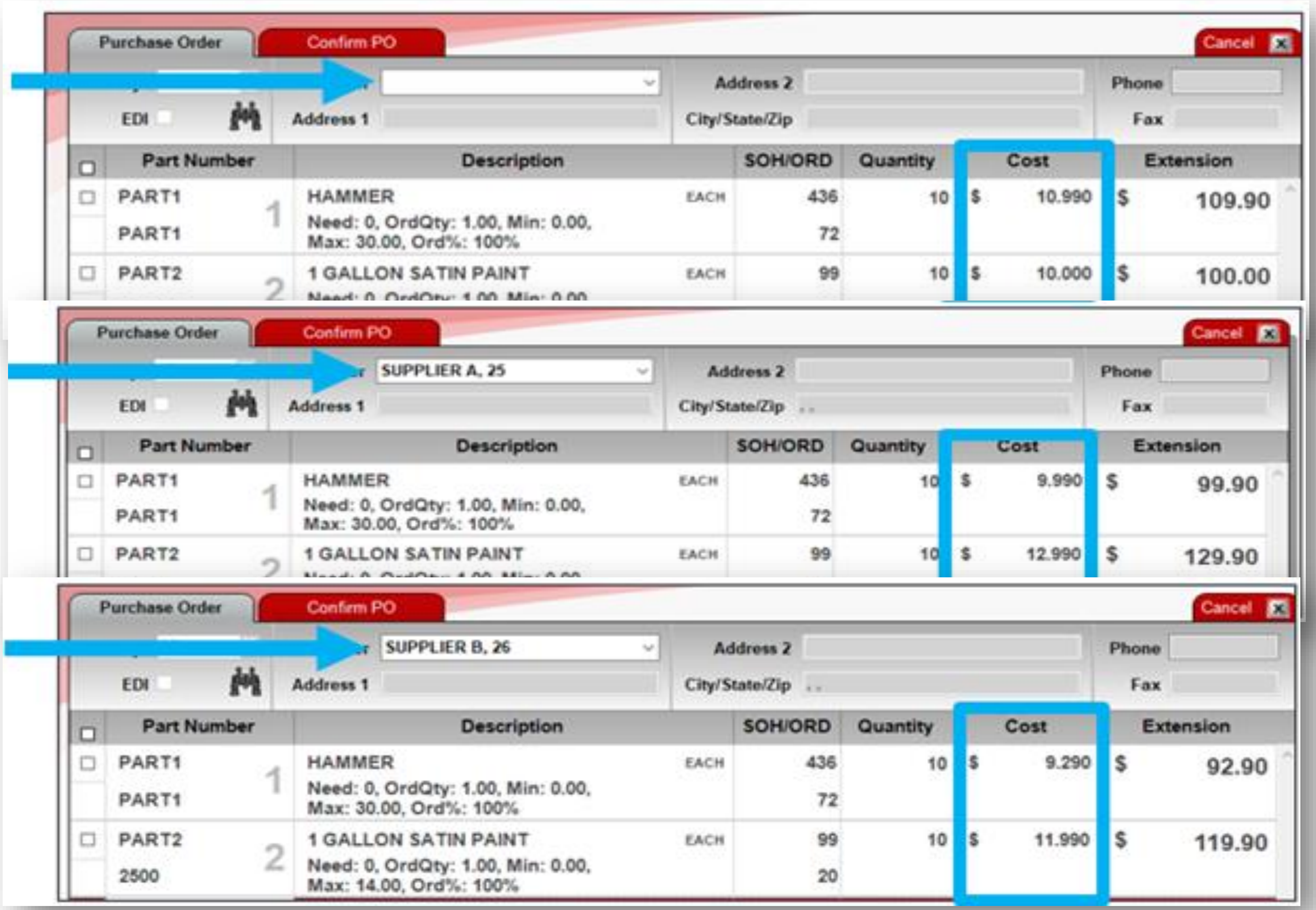
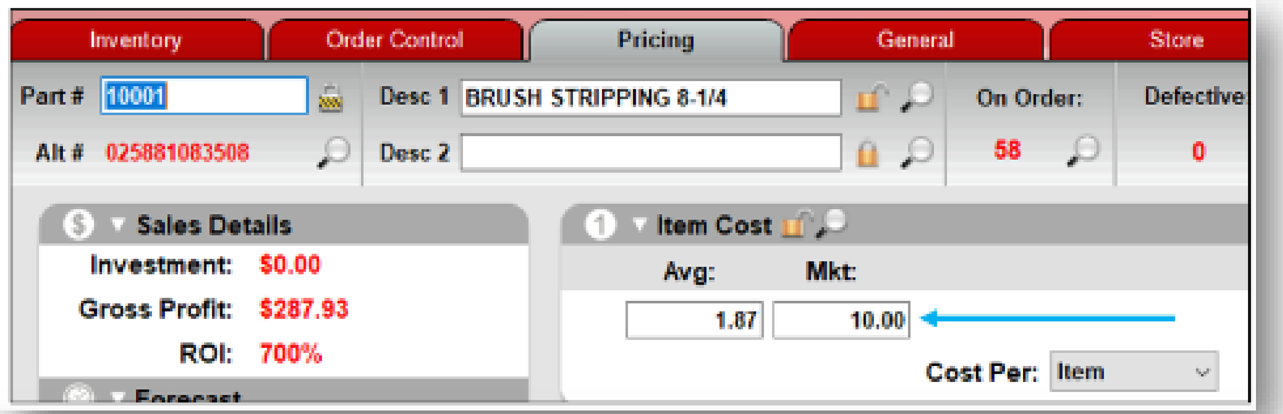


Apply supplier costs during ordering

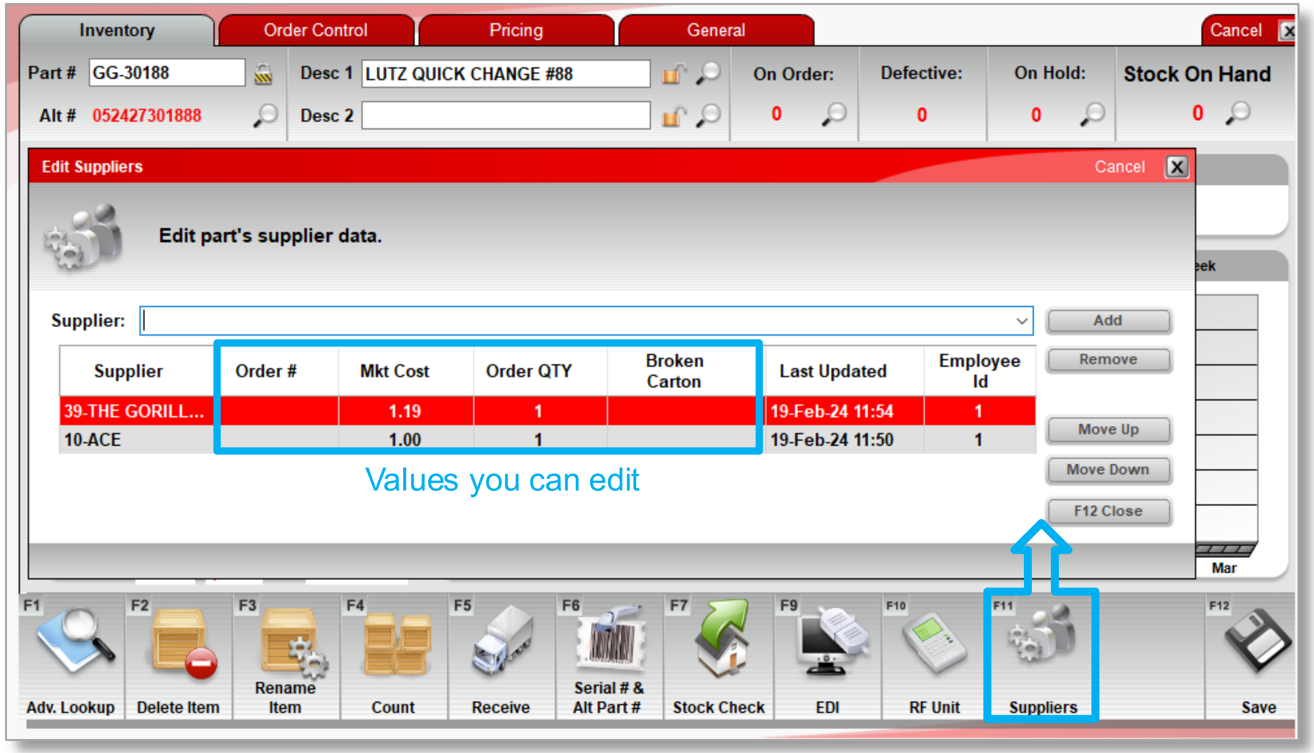
- *Note: If the cost of an item changes after you have stored the PO, the original costs are retained in the purchase order.*

Update supplier market cost upon PO invoice receiving event



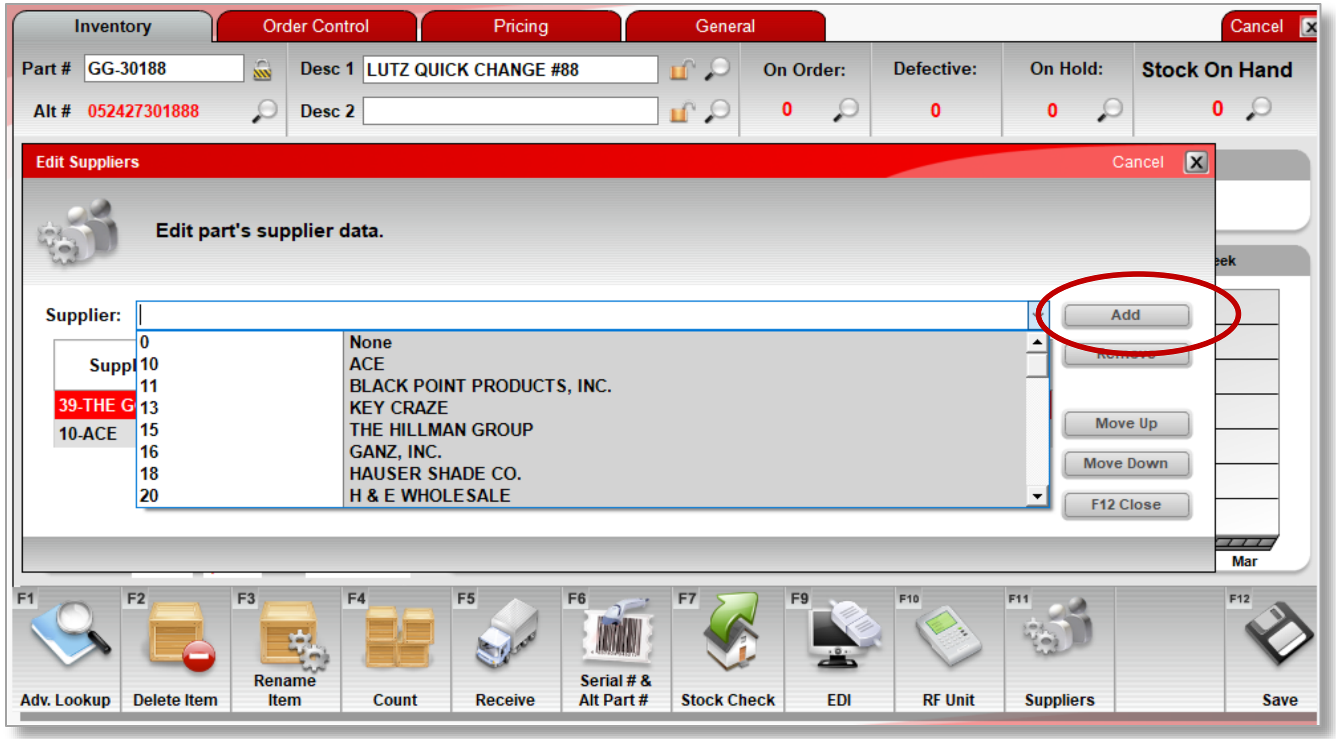
- This features allows manual changing of market cost for both EDI and non-EDI suppliers.
- This allows two market costs for the same supplier to exist: One market cost on Paladin's **Inventory** module **>** **Pricing** tab and the supplier cost on the **Edit Suppliers** window.

Set market costs, other order data for individual suppliers



1. In Paladin, on the top ribbon, select the **Inventory** module.
2. Open the inventory item.
3. On the bottom ribbon of the module, click **F11 Suppliers**.
4. In the **Edit Suppliers** window, click a supplier's market cost **(Mkt Cost)** to edit it. The following values can also be edited:
   - **Order #**
   - **Order QTY**
   - **Broken Carton**

Set market costs, other order data for individual suppliers

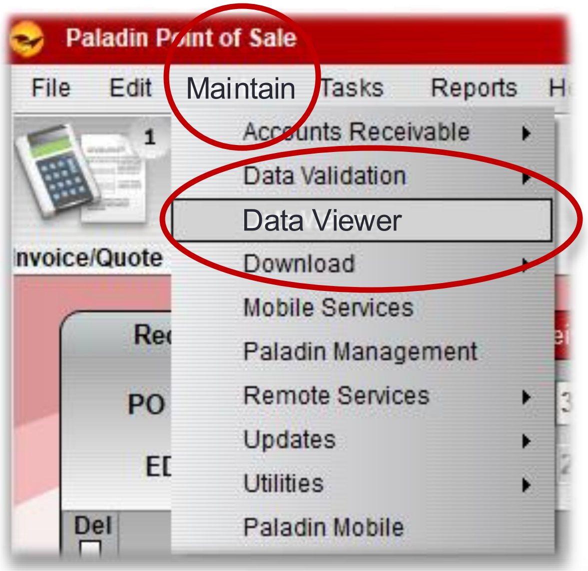


5. To add a new supplier to the list, in the **Supplier** list, select the supplier and click **Add**.
6. When you are finished with your changes, click **F12 Close**. If you changed a supplier's market cost (**Mkt Cost**), the value will be used the next time you purchase this item from the supplier.

Purchase Order Importer

PaladinPOS provides the ability to automatically import a list of items and create pending purchase orders for active inventory items. You can then confirm, buy and receive these purchase orders quickly and efficiently. The PO importer is useful for:

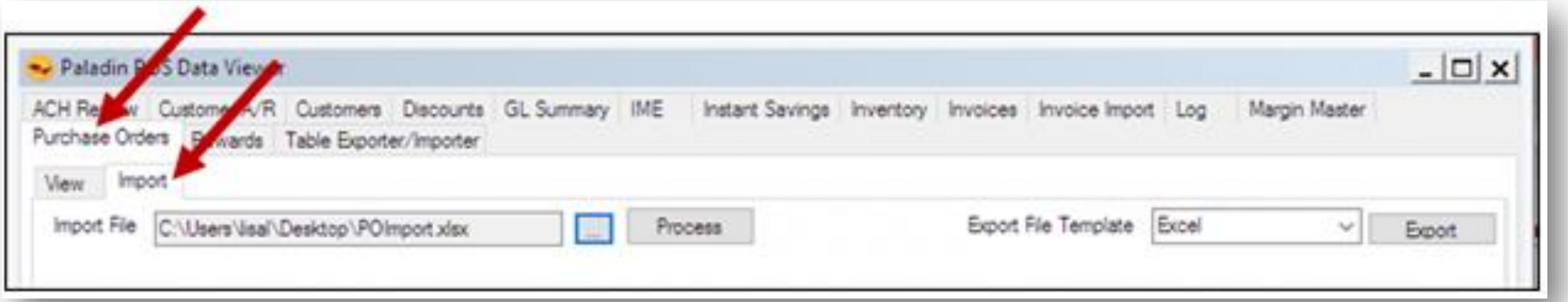
- Automating the time-consuming task of manually updating inventory items that were received outside of the normal purchasing process such as items from a trade show purchase, a manufacturer's special promotion items, or non-EDI vendors that are willing to email invoices as an attached file.
- Determining from a large list of items which items are carried in the store. For example, if a supplier gives you a list of sale items, you can import the items and price information, create a purchase order that contains only those items that are in active inventory, and then modify the purchase order for those items you wish to purchase.



Using the Purchase Order Importer

From the top menu, select **Maintain > Data Viewer**.

1. Click the **Purchase Orders** tab
2. Then click the **Import** tab



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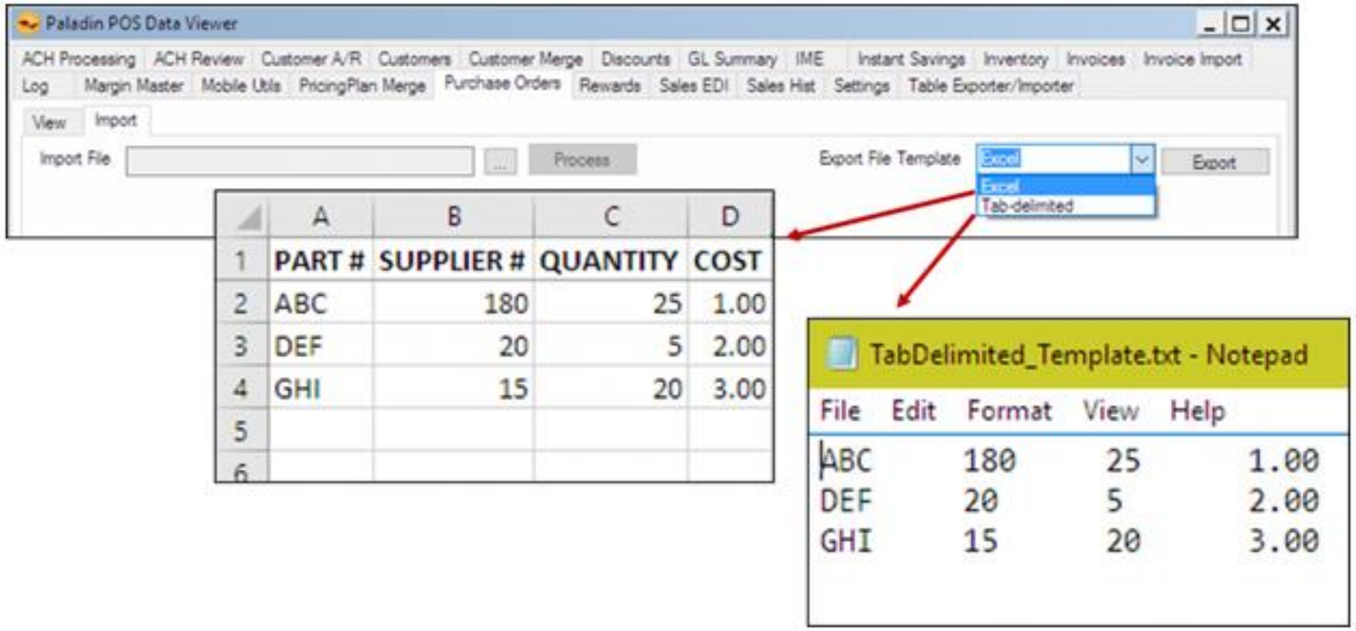
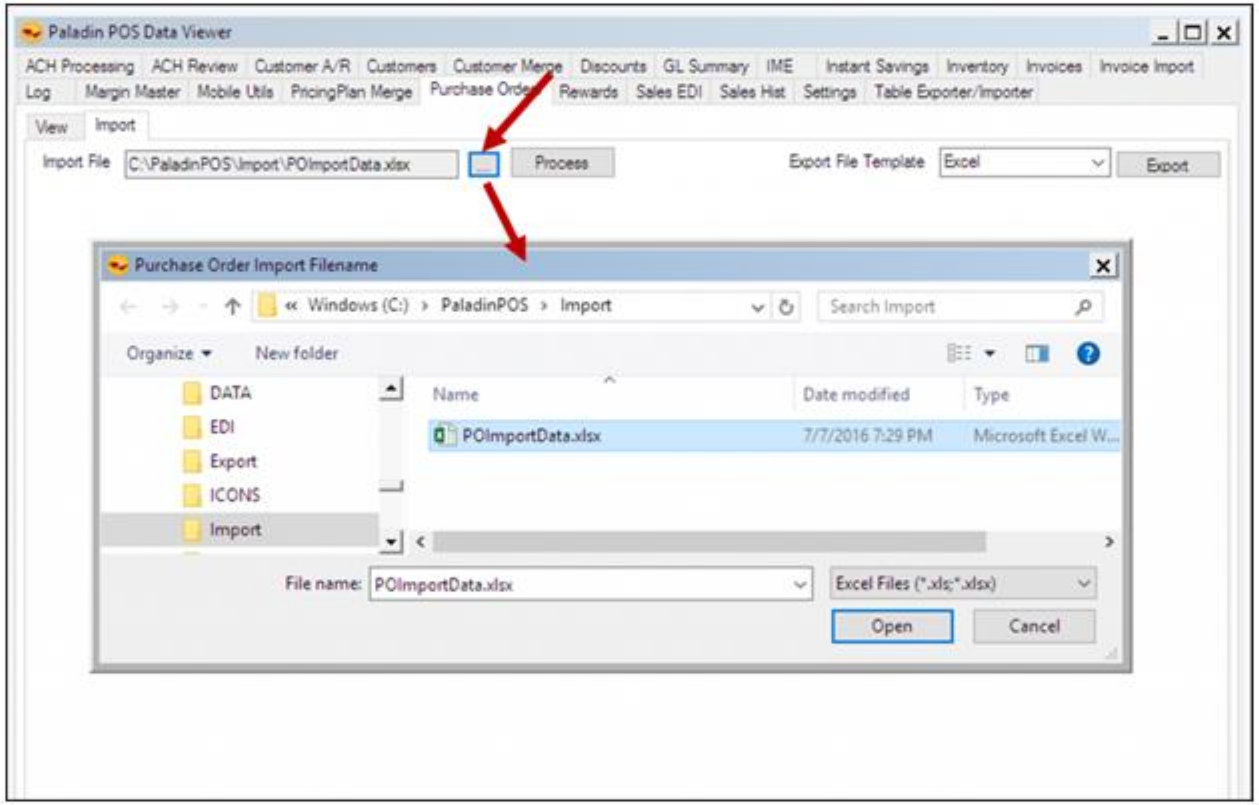
Using the Purchase Order Importer



3. To import your list of items, in the **Export File Template** list, select the type of file format that you use. It must be one of the following file formats: **Excel (.xlsx)** and **Tab-delimited text file**

Using the Purchase Order Importer



4. When the item information file is formatted and completed, press **Save** and **Close** the file.
5. Click the ellipsis […], select the Excel or Tab delimited file, then click **Process**.

Items in the file will be added to the pending purchase order only when they match active inventory items in Paladin.

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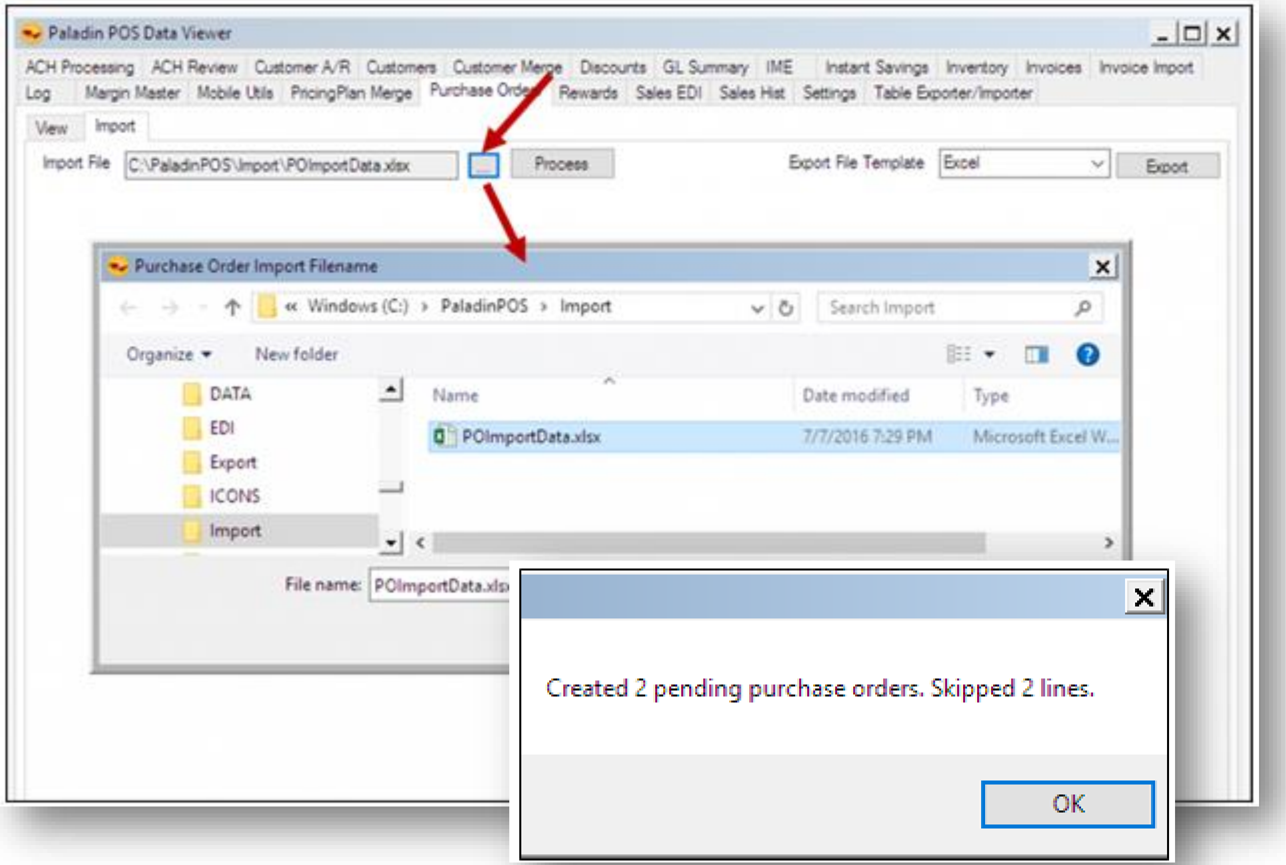
Using the Purchase Order Importer



6. If a match is not found, or the format is not correct, the line is skipped.
7. At the end of the import process, a message opens with the number of pending purchase orders that were created and the number of lines that were skipped.

Using the Purchase Order Importer

	A	B	C	D	E
1	PART #	SUPPLIER #	QUANTITY	COST	STATUS
2	PART10	10	25	3.49	
3	PART20	10	5	9.79	
4	PART30	21	20	20.99	
5	PART40	500	-10	5.99	Skipped
6	INVALID	10	20	22.50	Skipped

8. When the import process is completed, open the original import file to view a new STATUS column that identifies skipped lines.
9. In the **PO** module, you can view, edit, confirm, and buy (send to the supplier) the pending purchase orders.

Notes: For EDI suppliers: Purchased items will be automatically received through the EDI process.

*For non-EDI suppliers: On the bottom ribbon of the **PO** module, toggle **F5 Mode PO** to **F5 Mode Receive** to receive the delivered items.*

Learn More

To learn more, see the following resources in our Help Portal

- Purchase Orders

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

Next Webinar:

Paladin Makes Special Orders Special

September 22, 2026

9am PT

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