



PaladinPOS Makes Special Orders Easy

Ian McCracken
Account Specialist
September 22, 2026

WHAT YOU'LL LEARN

- About special orders (SO), How they orders work
- Enabling special orders, SO options
- Creating, saving/storing special orders
- Checking special order status
- Completing a special order
- Editing a special order
- Finding a special order
- Deleting special orders
- Applying freight costs
- Removing special order items from Suggest Orders

What's so special about Special Orders



- Special orders are one-time order requests from customers for items not available in a store's active inventory.
- Special orders can be items from a wholesaler, supplier, distributor or manufactured items, such as custom doors, windows, cabinets, etc.
- Paladin supports creating, ordering, receiving, tracking and distribution of special orders.

How Special Orders work



- The Paladin Special Order (SO) system spawn's multiple features down stream.
 - New items are created in inventory with an SO prefix number.
 - A pending purchase order is automatically created for suppliers associated with each SO item.
 - New SO items are blocked from being re-ordered from Suggested Ordering.
 - The SO is set to a unique department that is based on an employee's ID number or the item's actual department.
 - The new SO is stored as a customer account so a deposit can be taken.

Enabling Paladin Special Orders

Option	Description
Use Existing Inventory Departments for Special Order Items	Assigns standard inventory departments to the Special Order items instead of a special order department based on employee ID.
Disable Special Order Notes to Purchase Orders	Prevents line items on a Special Order invoice that are notes from appearing on the corresponding automatically-generated purchase order.
Allow Special Orders to Create ⁺ Customers	Allows a new customer to be created in the Customers module when a customer is not selected for the Special Order. This setting also turns on the Special Order deposit feature. Select a default deposit amount in the Special Order Default Deposits list.
Force Special Orders to big form?	Print Special Order on the store's laser printer using the larger page (8 ½ x 11) form.
Allow Special Orders to be edited	Allows you to recall and edit a special order and then save (store) your changes.
Special Order Default Deposit	Sets the default deposit percentage that you can collect after save a special order. You can change the deposit percentage or enter a custom deposit amount for each special order. To use this feature, the Allow Special Orders to Create Customers checkbox must also be selected.

- Paladin's Special Order system enables special order sales to be reported as existing inventory departments rather than under a salesperson's ID.

- To enable this feature: from the main menu, select **File > Setup**.
- Select the **Company** tab.
- In the **Special Orders** pane, select any of the options listed in the following table.
- Click **Save**, then click **Close**.

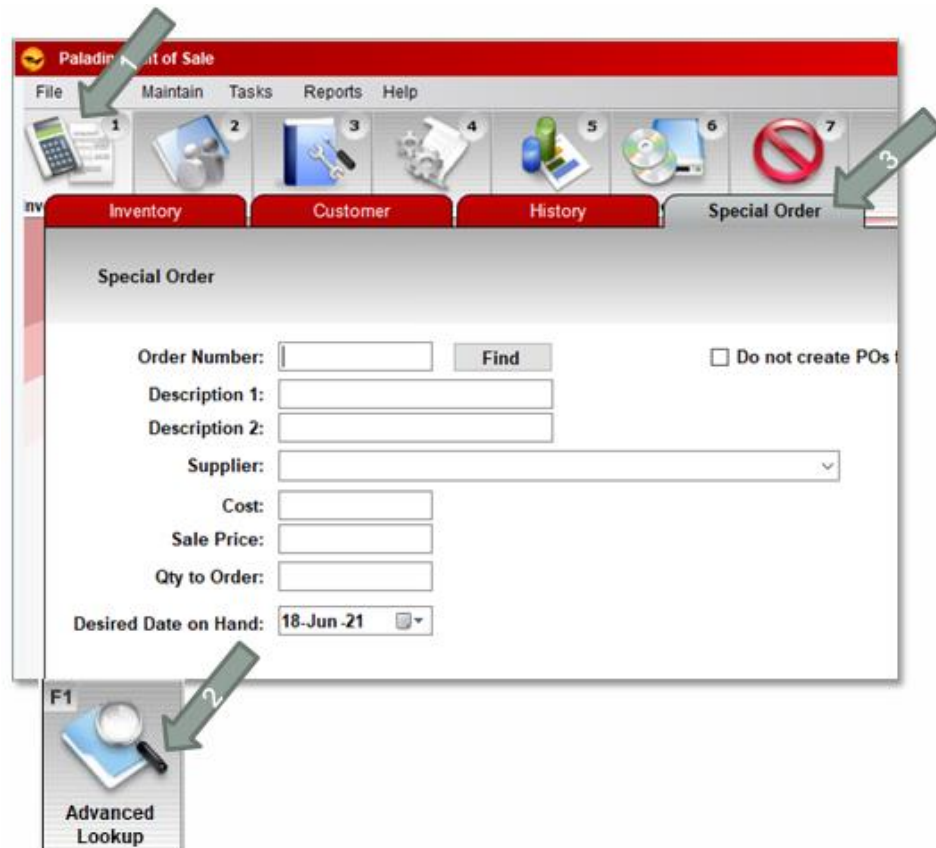
Important: If the **Enable Special Orders** checkbox is not selected, you must contact Paladin Support to have the Special Order feature turned on before selecting the options at left.

Create Special Order customers



- In Paladin, special orders allow a deposit to be placed on account by the customer at the time the special order is placed.
- To enable this feature:
 1. In Paladin, from the main menu, select **File > Setup**.
 2. Select the **Company** tab.
 3. In the **Special Orders** pane, check **Allow Special Orders to Create Customers**.
 4. Click **Save**, then click **Close**.

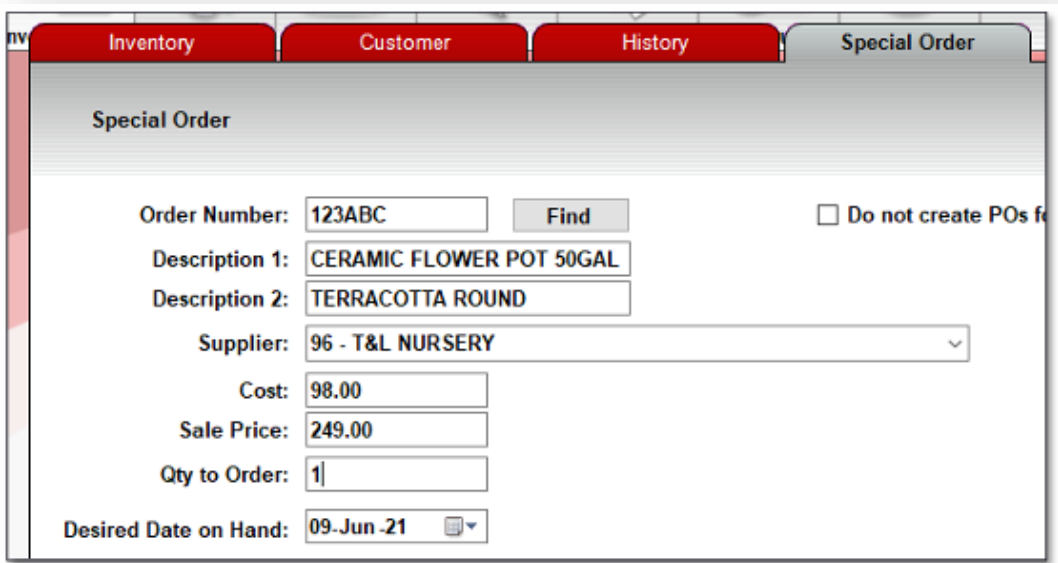
Creating a Special Order



To create a Special Order (SO) for items that you don't normally carry, use the **Special Order** tab in the **Advanced Lookup** window of the **Invoice/Quote**.

1. Open the **Invoice/Quote** module.
2. Optional: In the **Customers** list, select the customer.
3. On the bottom ribbon, click **Advanced Lookup** or press **F1**.
4. Click the **Special Order** tab.

Creating a Special Order



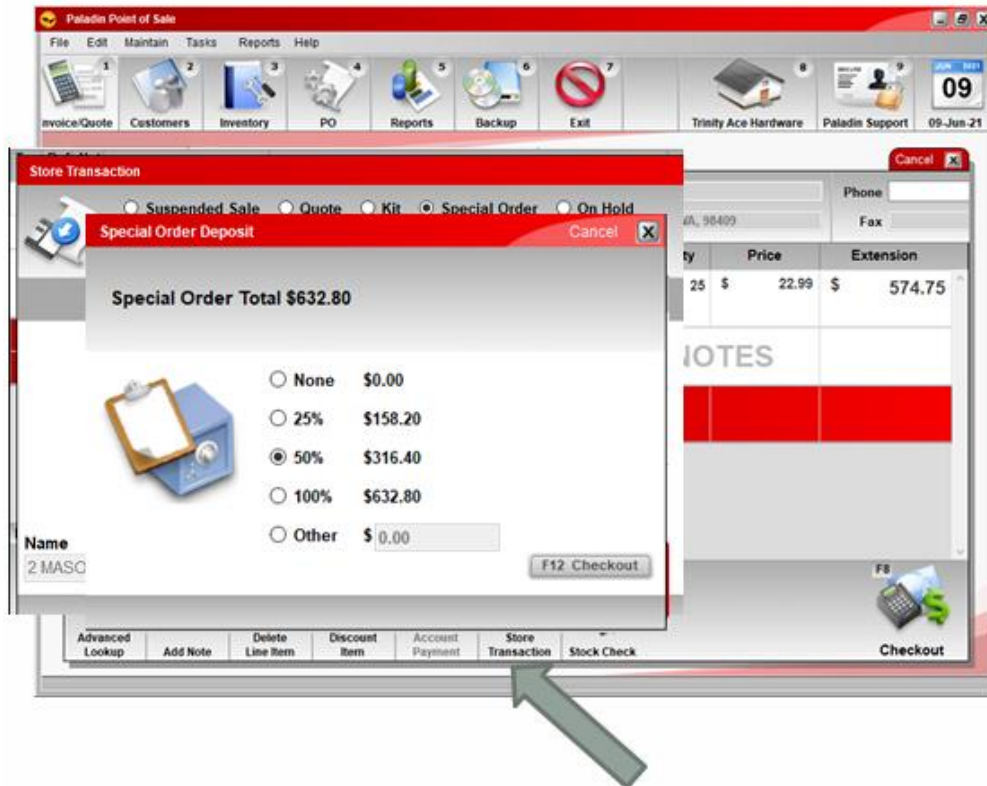
The screenshot shows a software interface for creating a special order. At the top, there are four tabs: 'Inventory', 'Customer', 'History', and 'Special Order'. The 'Special Order' tab is selected. Below the tabs, the form is titled 'Special Order'. It contains several input fields and a 'Find' button. The 'Order Number' field is filled with '123ABC'. The 'Description 1' field is filled with 'CERAMIC FLOWER POT 50GAL'. The 'Description 2' field is filled with 'TERRACOTTA ROUND'. The 'Supplier' field is a dropdown menu showing '96 - T&L NURSERY'. The 'Cost' field is filled with '98.00'. The 'Sale Price' field is filled with '249.00'. The 'Qty to Order' field is filled with '1'. The 'Desired Date on Hand' field is filled with '09-Jun -21'. There is a checkbox labeled 'Do not create POs for' which is unchecked.

Order Number:	123ABC	Find	☐ Do not create POs for
Description 1:	CERAMIC FLOWER POT 50GAL		
Description 2:	TERRACOTTA ROUND		
Supplier:	96 - T&L NURSERY		
Cost:	98.00		
Sale Price:	249.00		
Qty to Order:	1		
Desired Date on Hand:	09-Jun -21		

5. In the **Order Number** box, enter or scan the part number, then click **Find** to search your active and obscure inventory.
 - If the item is found, the **Description**, **Sale Price** and **Cost** for the special order are filled in automatically.
 - If the item is not found, enter this information.

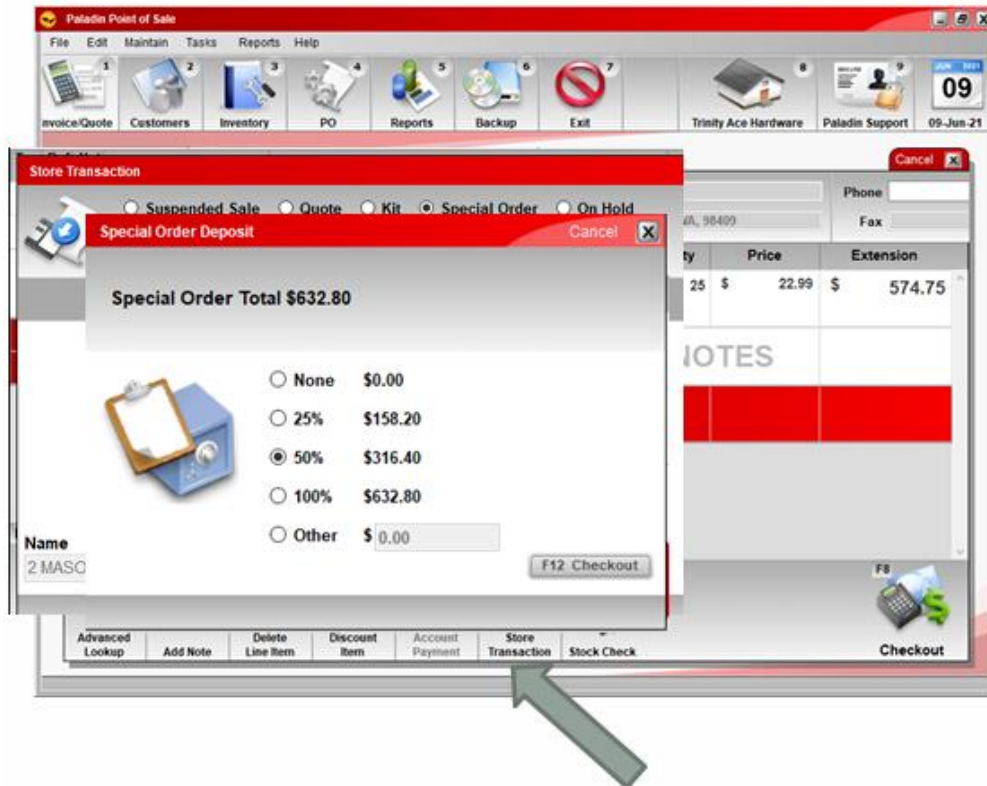
• Description 1	• Supplier
• Description 2 (optional)	• Cost
	• Margin
 - Note: The final cost will be determined when the item is received from the supplier

Creating a Special Order - Saving/Storing



6. Press **F8 Finish**. The **Advanced Lookup** window closes and the **Special Order** invoice appears.
7. **Optional:** To add additional special order items, repeat steps 4-6.
8. On the bottom ribbon of the **Invoice/Quote** tab, click **F6 Store Transaction**.
9. In the **Store Transaction** window, select **Special Order**.
10. **Optional:** Enter a memo in the **Memo** box. This can help you locate the PO or special order later.

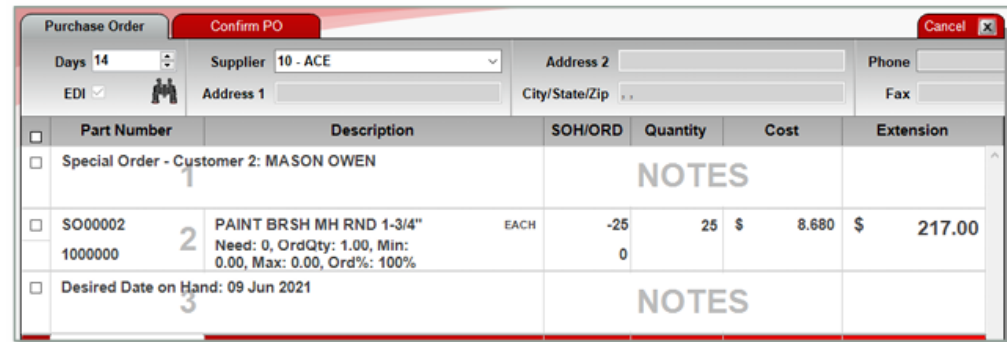
Storing a Special Order



11. Click **F12 Store**. When you store the special order, the following occurs:
 - If no customer is selected, enter a customer name and information. This will be added to the special order and purchase order.
 - If a customer is not selected, and the **Allow Special Orders to Create Customers** option is set, a new customer is created in the **Customers** module.
 - A name for the special order is automatically created in this format: <customer ID>-<customer name>-<stored date and time>

Complete a Special Order

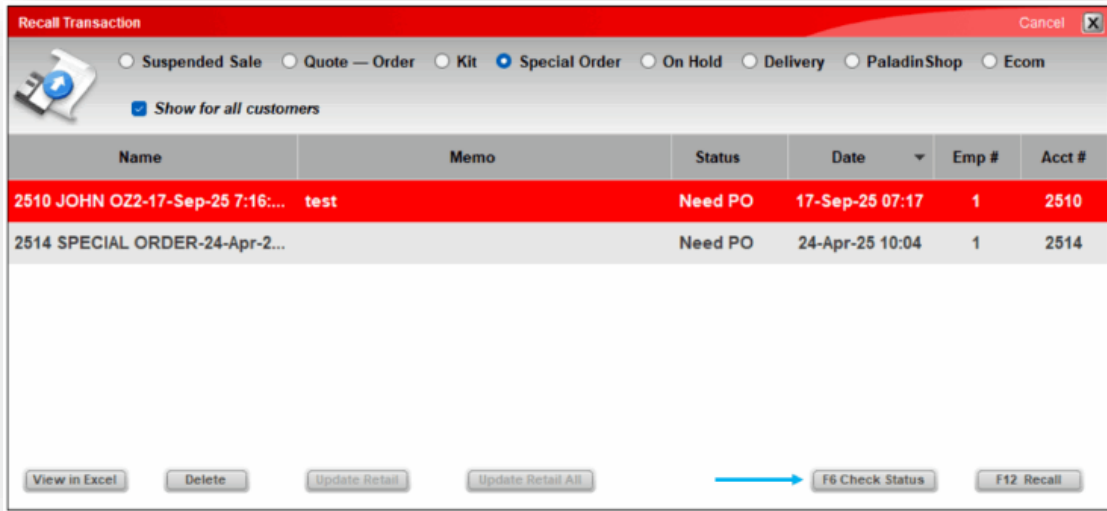
1. In Paladin, on the top ribbon, select the **Invoice/Quote** module.
2. On the bottom ribbon of the module, click **F6 Recall Transaction**.
3. In the **Recall Transaction** window, select **Special Order**.
4. Highlight the **Special Order** and click **F12 Recall** to recall the SO.
Optional: Edit, add, or delete items in the invoice.
5. Complete the checkout process.



Part Number	Description	SOH/ORD	Quantity	Cost	Extension
Special Order - Customer 2: MASON OWEN					
SO00002	PAINT BRSH MH RND 1-3/4"	EACH	-25	25 \$ 8.680	\$ 217.00
1000000	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 0.00, Ord%: 100%		0		
Desired Date on Hand: 09 Jun 2021					



Checking SO status



The screenshot shows the 'Recall Transaction' window. At the top, there are radio buttons for different transaction types: 'Suspended Sale', 'Quote — Order', 'Kit', 'Special Order' (which is selected), 'On Hold', 'Delivery', 'PaladinShop', and 'Ecom'. Below these is a checkbox labeled 'Show for all customers' which is also checked. The main area is a table with columns: Name, Memo, Status, Date, Emp #, and Acct #. Two rows are visible: one for '2510 JOHN OZ2-17-Sep-25 7:16:...' with status 'Need PO' and date '17-Sep-25 07:17', and another for '2514 SPECIAL ORDER-24-Apr-2...' with status 'Need PO' and date '24-Apr-25 10:04'. At the bottom, there are buttons for 'View in Excel', 'Delete', 'Update Retail', 'Update Retail All', 'F6 Check Status' (highlighted with a blue arrow), and 'F12 Recall'.

	A	B	C	D	E	F	G	H
1	PO Number	Line Number	Partnumber	Description	Canceled	Ordered	Received	
2	232	2	0010371	ANCHOR SHACKLE SCREW PIN 3/8	0	1	0	
3	232	3	0010124	SEALER OUTLET PLATE FOAM WHI	0	1	0	
4	232	4	0011056	HAND TRUCK PNEUM TIRES 600 L	0	1	0	
5	232	5	0011049	HAND TRUCK SOLID TIRES 400 L	0	1	0	

To check the status of a special order:

1. In Paladin, select the **Invoice/Quote** module.
2. On the bottom ribbon of the module, select **F6 Recall Transaction**.
3. In the **Recall Transaction** window, enable **Special Order** and check **Show for all customers**.
4. Highlight the special order you want to check the status on and press **F6 Check Status** at the bottom of the window.

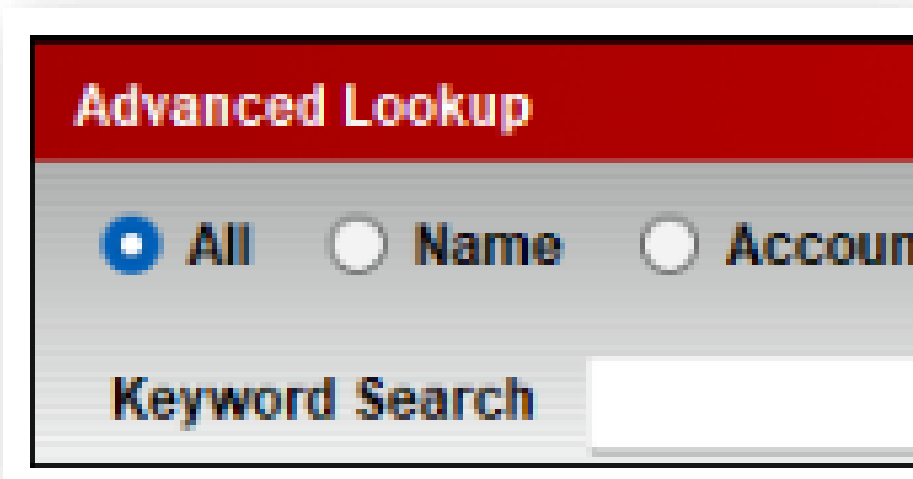
An Excel file will open with the **Canceled**, **Ordered**, and **Received** rows showing the status.

Finding a Special Order

After special orders have been created, they can be found by:

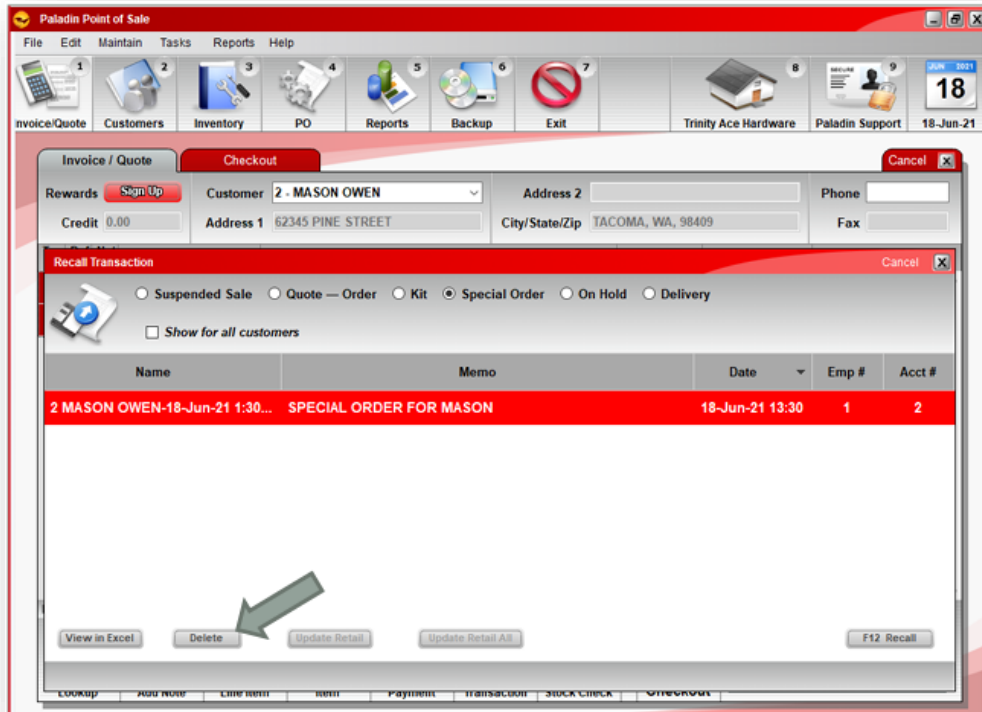
1. Selecting the **PO** module.
2. Toggle **F5** to **Mode Receive**.
3. Select **F6 Find PO**.
4. In the **Find PO** window, tap the down arrow of the **S/O/ Cust** list to open the **Advanced Lookup** window where you can enable the following:

- | | |
|---|--|
| <ul style="list-style-type: none">• All• Name• Account Number | <ul style="list-style-type: none">• Address• Phone• Rewards Number |
|---|--|



Deleting a Special Order

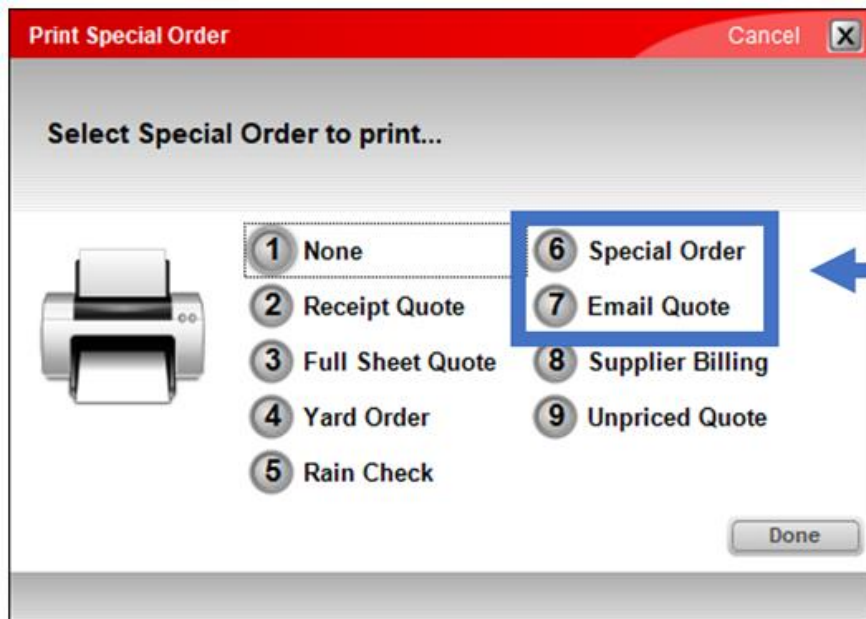
1. Open the **Invoice/Quote** module.
2. Click **Recall Transaction** or press F6.
3. Highlight the **Special Order**, and then click **Delete**. All values for inventory on hold will be returned to their appropriate stock on hand quantities.
4. If you created a purchase order for this special order, delete that purchase order.



Configuration option: Edit saved special orders

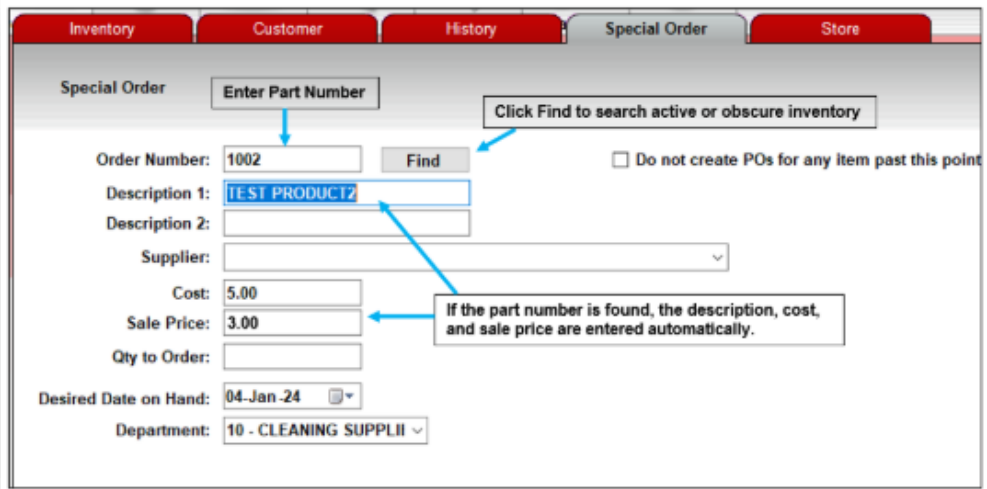
- A configuration setting allows you to recall and edit a special order and then save (store) your changes.
- **Important:** Use caution when you edit a special order for the following reasons:
 - When you modify a special order item price or quantity, or make other changes, the updated special order will no longer match the customer's original copy, and the associated purchase order will not be updated.
 - If you increased an item quantity, you may need to create a separate purchase order for the additional items.
 - If you reduced an item quantity, you may need to cancel the unneeded items.
- **Tip:** When you make changes to a special order, email or print an updated copy of the Special Order invoice for the customer from the **Print Special Order** window that opens when you save your changes.

Allow changes to Special Orders



1. In Paladin, from the main menu, select **File > Setup**.
 2. Select the **Company** tab.
 3. In the **Special Orders** pane, check **Allow Special Orders to Be Edited**.
 4. Click **Save**, then click **Close**.
- Tip: When you make changes to a special order, email or print an updated copy of the Special Order invoice for the customer. You can do this from the **Print Special Order** window that opens when you save your changes.

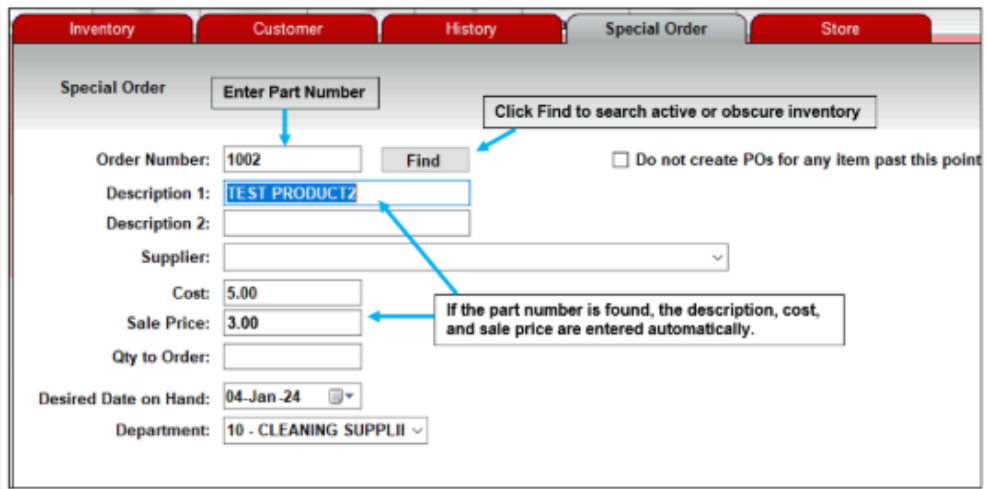
Special Order search feature



The screenshot shows a software interface with a red header bar containing tabs: Inventory, Customer, History, Special Order, and Store. The 'Special Order' tab is active. Below the header, there is a 'Special Order' section with a text input field labeled 'Enter Part Number' containing '1002'. To the right of this field is a 'Find' button. A callout box points to the 'Find' button with the text 'Click Find to search active or obscure inventory'. Below the 'Find' button is a checkbox labeled 'Do not create POs for any item past this point'. To the left of the 'Find' button, there are several fields: 'Order Number:' (1002), 'Description 1:' (TEST PRODUCT2), 'Description 2:', 'Supplier:' (a dropdown menu), 'Cost:' (5.00), 'Sale Price:' (3.00), 'Qty to Order:', 'Desired Date on Hand:' (04-Jan-24), and 'Department:' (10 - CLEANING SUPPLII). A callout box points to the 'Description 1' field with the text 'If the part number is found, the description, cost, and sale price are entered automatically.'

- The Special Order feature can assist if customers want to purchase an item that is not in stock but can be ordered from a supplier, or they may ask for an unusually large quantity of an item.
- In Paladin's **Invoice/Quote** module, a special order is set up on the **Special Order** tab in the **Advanced Lookup** window. Because special order items are often already in your inventory database, the Special Order feature will search your active and obscure inventory for an item.

Special Order search feature



Special Order

Enter Part Number

Click Find to search active or obscure inventory

Order Number: 1002 Find ☐ Do not create POs for any item past this point

Description 1: TEST PRODUCT2

Description 2:

Supplier:

Cost: 5.00

Sale Price: 3.00

Qty to Order:

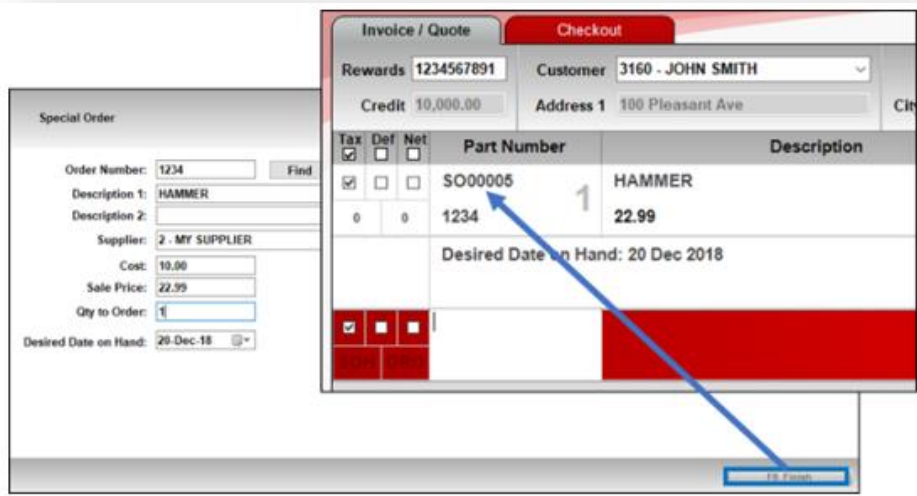
Desired Date on Hand: 04-Jan-24

Department: 10 - CLEANING SUPPLII

If the part number is found, the description, cost, and sale price are entered automatically.

- To start the search:
 1. In Paladin, on the top ribbon, select the **Invoice/Quote** module.
 2. Click **F1 Advanced Lookup**.
 3. Select the **Special Order** tab, and in the **Order Number** box, enter or scan the part number, and then click **Find**. If the item is found, the description, price, and cost for the special order are filled in automatically.
- Note: To search a supplier's obscure inventory, this feature must be turned on in Paladin Configuration.

Special Order search feature



Tax	Def	Net	Part Number	Description
☒	☐	☐	SO00005	
☒	☐	☐	1234	HAMMER
0	0	0		22.99

Desired Date on Hand: 20 Dec 2018

4. Select a supplier from the **Supplier** list.
5. Enter the quantity in the **Qty to Order** box.
6. Set the **Desired Date On Hand**.
7. Click **F8 Finish** to add the item to the Special Order invoice.
 - After the Special Order invoice is saved, a purchase order is automatically created. In the **PO** module, you can recall the purchase order and send it to a supplier.
 - After the items are received, in the **Invoice/Quote** module, click **F6 Recall Transaction** to open the Special Order invoice and complete the sale.

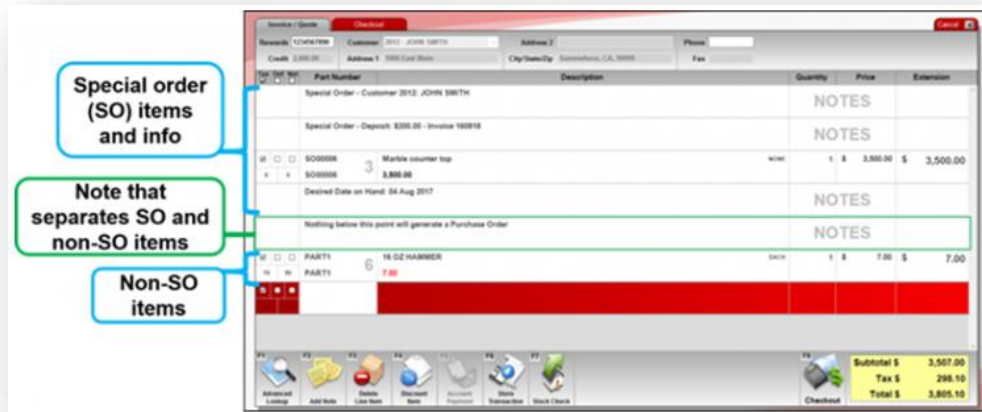
Adding special order notes

To disable this function and prevent note fields from being added to Special Order POs:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. In the **Special Orders** pane, check **Disable Special Order Notes to Purchase Orders**.
4. Click **Save**, then click **Close**.

- In many instances, note fields are used to further define the product being special ordered.
- In Paladin, all Special Order quote note fields are added to the Special Order PO generated when the Special Order quote is saved. The note field lists part numbers, and the notes are added to the part number supplier's Special Order PO.

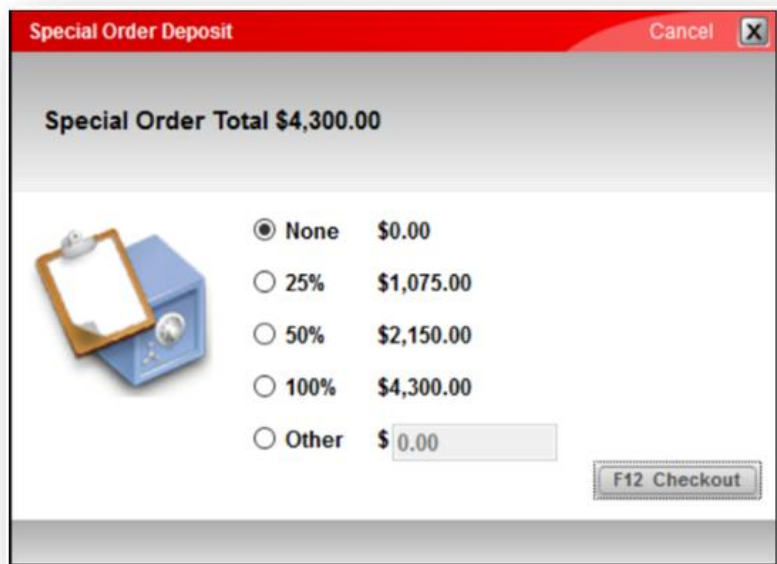
Editing Special Order items



Special Orders have the following features:

- You can recall a Special Order (SO), add, change, or delete quoted (non-SO) items, and then save your changes.
- Special Order items are separated from quoted (non-SO) items with this note: *Nothing below this point will generate a Purchase Order.*
- When you recall a special order, this note is added. You can only make changes to a recalled special order below this note.

Editing Special Order items

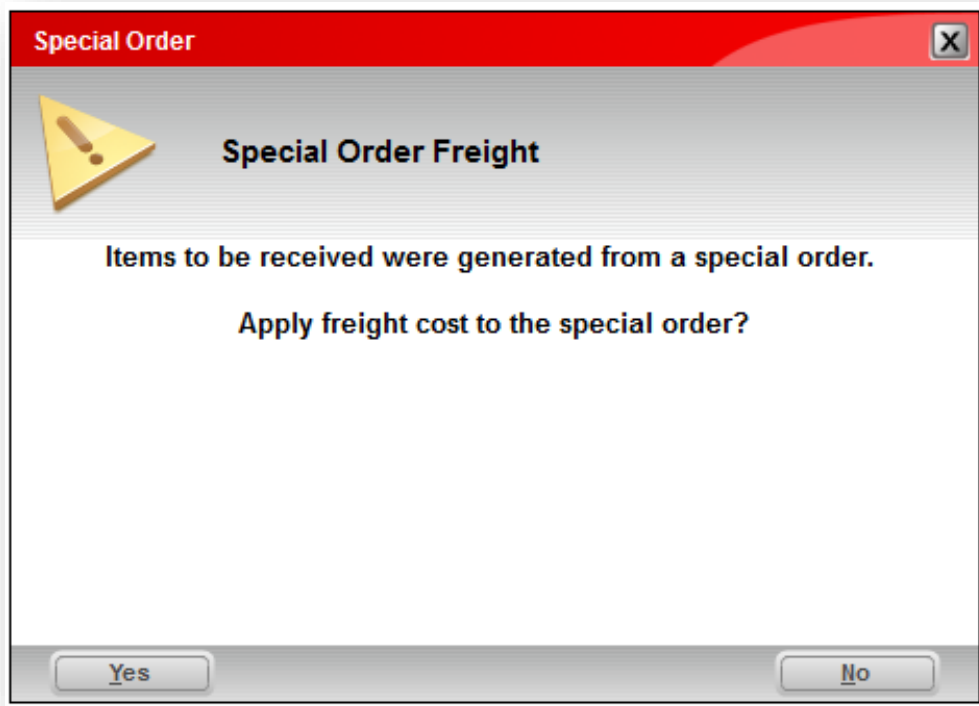


The image shows a software dialog box titled "Special Order Deposit". At the top, it displays "Special Order Total \$4,300.00". Below this, there is an icon of a clipboard and a blue safe. To the right of the icon is a list of radio button options for deposit amounts: "None \$0.00", "25% \$1,075.00", "50% \$2,150.00", "100% \$4,300.00", and "Other \$0.00". The "None" option is currently selected. The "Other" option has a text input field next to it containing "0.00". In the bottom right corner, there is a button labeled "F12 Checkout". A "Cancel" button with a close icon is in the top right corner.

Option	Amount
☒ None	\$0.00
☐ 25%	\$1,075.00
☐ 50%	\$2,150.00
☐ 100%	\$4,300.00
☐ Other	\$0.00

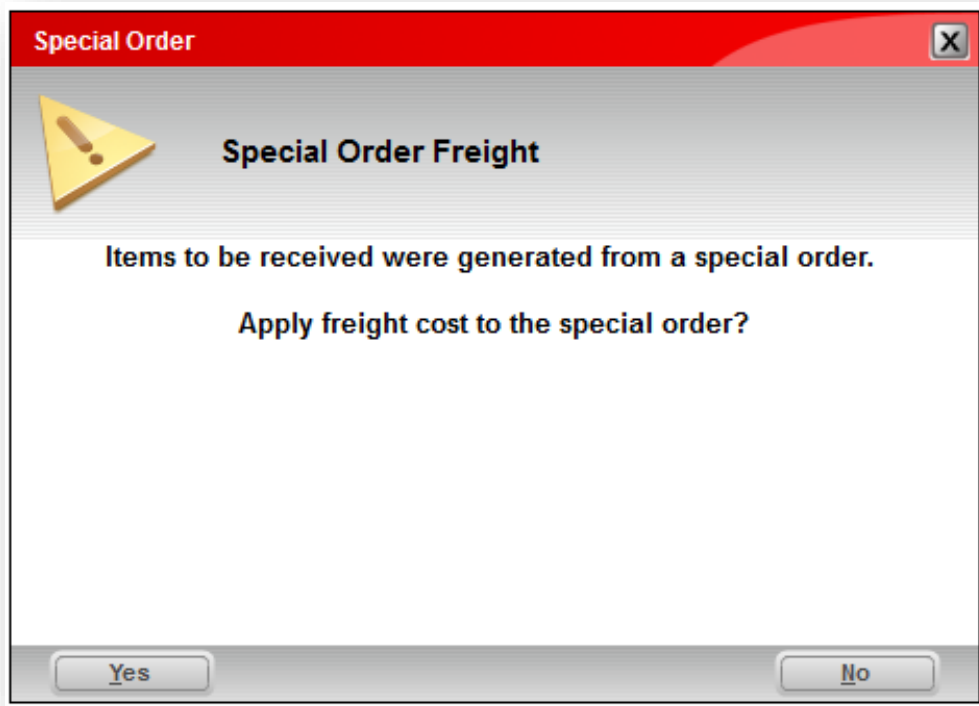
- After you save your Special Order changes, if the Special Order deposit feature is turned on, and a deposit was not previously made, you are prompted to collect a one.
- In the **Special Order Deposit** window, select the amount of the deposit and press **F12 Checkout**.
- Complete the sale.

Manually receiving a PO for an SO



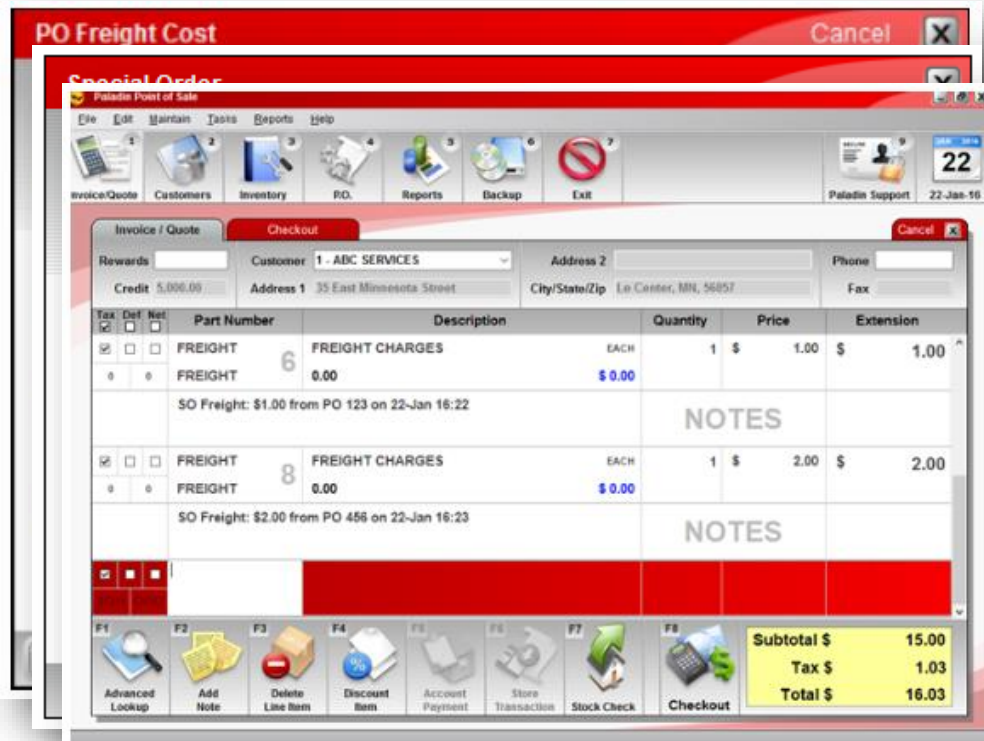
1. In Paladin, on the top ribbon, select the **PO** module.
2. On the bottom ribbon of the module, toggle **F5 Mode PO** to **F5 Mode Receive**.
3. On the bottom ribbon of the **Receive PO** tab, click **F6 Find PO**, then select the purchase order that contains the special order items.
4. Verify that the received item quantities and costs on the purchase order are correct.

Manually receiving a PO for an SO



5. On the **Receive PO** tab, click **F8 Process**.
6. In the **Confirm Receive** tab, click **F1 Process**.
7. **Optional:** In the **PO Freight Cost** window, enter the **Freight Cost**, then click **F8 OK**.
8. In the **Special Order** window, click **Yes** to add the purchase order freight cost to your special order.

Manually receiving a PO for an SO



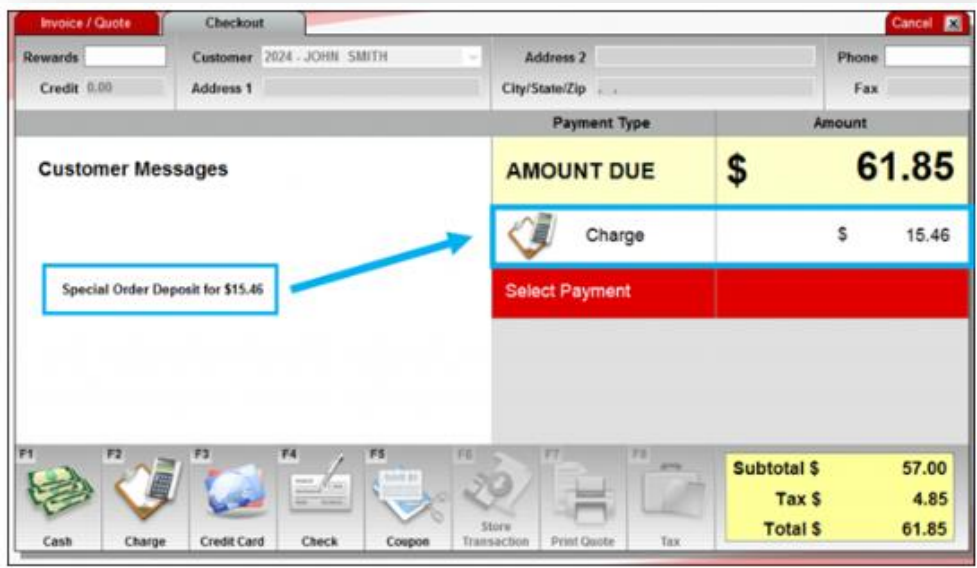
The screenshot shows the 'Special Order' software interface. The 'PO Freight Cost' window is open, displaying a table with freight charges. The table has columns for 'Part Number', 'Description', 'Quantity', 'Price', and 'Extension'. There are two entries for freight charges, each with a quantity of 1 and a price of \$1.00 and \$2.00 respectively. The 'Subtotal' is \$15.00, 'Tax' is \$1.03, and 'Total' is \$16.03.

Part Number	Description	Quantity	Price	Extension
6	FREIGHT CHARGES	1	\$ 1.00	\$ 1.00
8	FREIGHT CHARGES	1	\$ 2.00	\$ 2.00

Subtotal \$ 15.00
Tax \$ 1.03
Total \$ 16.03

- If you click **Yes**, a line item is added to the associated special order for the freight cost, and additional notes are included that identify the purchase order number, date and time the items were received.
- If a special order required more than one purchase order, or the special order items on a purchase order are received at different times, the Special Order invoice can include multiple freight costs.
- If you do not want to add the freight cost to the special order during receiving, you can add the freight cost to the customer invoice when you complete the sale. After you create it, you cannot add freight cost or make any other changes to a special order.

Set up and view a deposit

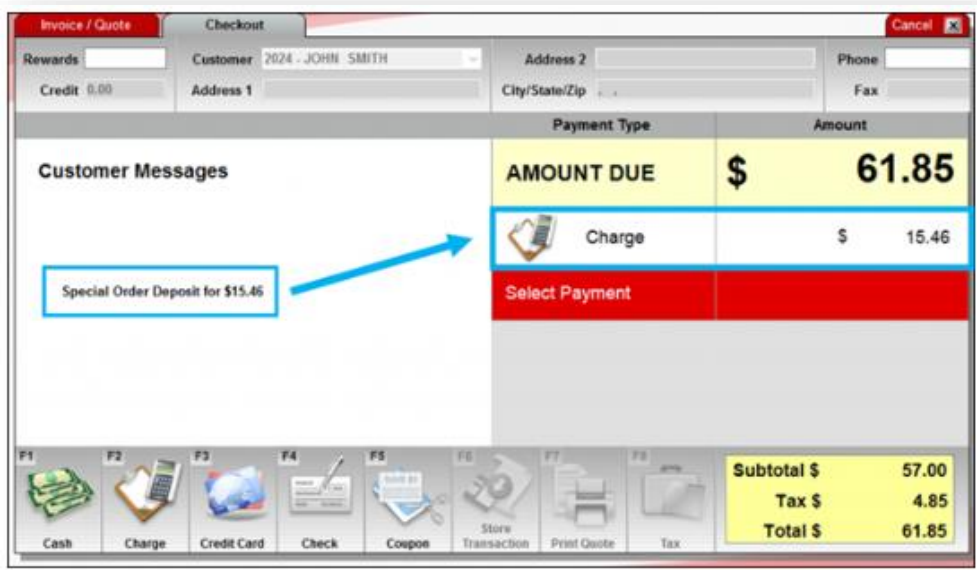


The screenshot shows the 'Checkout' screen in the University software. The 'Customer Messages' section on the left contains a message: 'Special Order Deposit for \$15.46'. A blue box highlights this message, and a blue arrow points from it to the 'Charge' payment type in the 'Payment Type' table. The 'Payment Type' table has two columns: 'Payment Type' and 'Amount'. The first row is 'AMOUNT DUE' with an amount of '\$ 61.85'. The second row is 'Charge' with an amount of '\$ 15.46'. Below the table is a red button labeled 'Select Payment'. At the bottom of the screen, there is a toolbar with icons for Cash, Charge, Credit Card, Check, Coupon, Store Transaction, Print Quote, and Tax. The bottom right corner shows the following totals:

Subtotal \$	57.00
Tax \$	4.85
Total \$	61.85

- A Special Order deposit will be applied as a **Charge** payment when the customer pays the remaining special order balance.
- **To set up a Special Order deposit:**
 1. In Paladin, from the main menu, select **File > Setup**.
 2. Select the **Company** tab.
 3. In the **Special Orders** pane, verify **Enable Special Orders** is checked.
- **Note:** If it is not, you cannot continue because the Special Order feature is not turned on in your store

Set up and view a deposit



The screenshot shows the 'Checkout' screen in the University software. The 'Customer Messages' section on the left contains a message: 'Special Order Deposit for \$15.46'. A blue box highlights this message, and a blue arrow points from it to the 'Charge' payment option in the 'Payment Type' table. The table shows the 'AMOUNT DUE' as \$61.85, with a 'Charge' option for \$15.46. Below the table is a 'Select Payment' button. The bottom of the screen shows a toolbar with icons for Cash, Charge, Credit Card, Check, Coupon, Store Transaction, Print Quote, and Tax. The bottom right corner displays the following totals:

Subtotal \$	57.00
Tax \$	4.85
Total \$	61.85

4. Check **Allow Special Orders to Create Customers**.

- Note: If a customer is not selected when you save the special order, you are prompted for customer information. This option allows a new customer to be created in the **Customers**. This setting also turns on the **Special Order Deposit Collection** feature.

5. Select the default **Special Order Default Deposit** value.

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

Exclude a special order item from the suggest order

- In Paladin, on the top ribbon, select the **Inventory** module.
- Enter the part in the **Part #** box, or click **F1 Adv. Lookup**.
- **Note:** In the **Advanced Lookup** window, check **Include Special Order Items**.
- Once the Special Order is located, select the **Order Control** tab.
- In the **Stock Information** section, set **Max Qty** to 0.
- Click the **lock icon** next to **Max Qty**.to lock the field.
- Click **F12 Save**.



Learn More

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

- [Special Orders](#)

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

Next Webinar:

Protecting Your Store in the Age of AI Cyberthreats

October 13

9am PT

<https://portal.paladinpos.com/webinars/>



Expand Your Knowledge

Stay relevant in retail:
paladinpointofsale.com/retailsience

Self help at:
portal.paladinpos.com

Webinars available at:
portal.paladinpos.com/webinars

Follow us for Paladin news and updates:

