



Special Orders Made Easy 2021

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WHAT YOU'LL LEARN

- About special orders (SO)
- How special orders work
- Adding a special order item
- Processing the SO purchase order
- Receiving a PO for a special order
- Completing a special order
- Allowing changes to special orders
- Deleting special orders
- Special order reporting
- Special order setup options

About Special Orders

- Special orders are a one-time order request from customers for items not available in the stores 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.



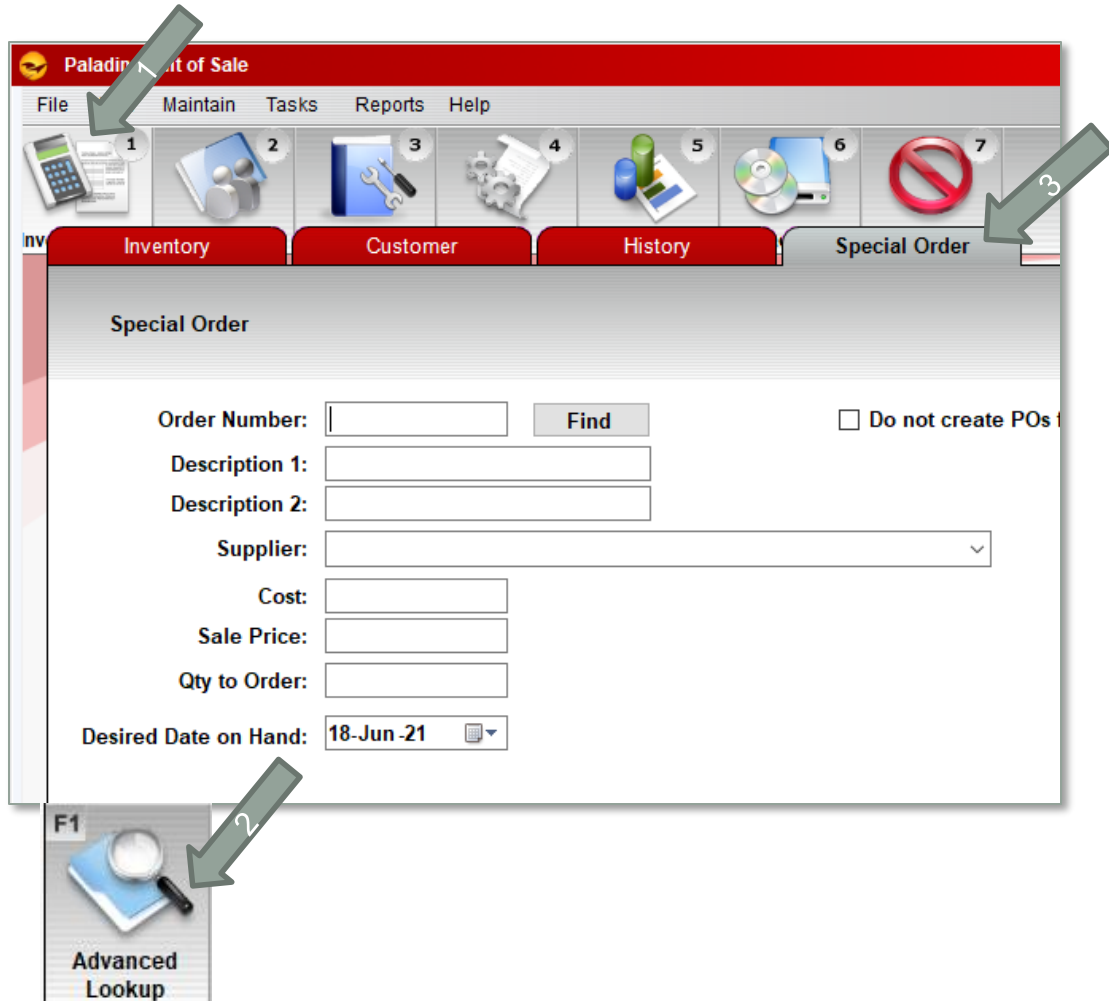
How Special Orders Work

The Special Order (SO) system spawn's multiple features down stream.

- When you create a special order, new SO item(s) are created in inventory with the prefix SO, followed by a unique computer-generated SO number. Example SO part #: SO0001
- When a special order is stored, it automatically generates a pending purchase order for the supplier associated with each SO item.
- The new SO item is blocked from being automatically reordered using the suggested ordering system by locking the MAX QTY at zero (0).
- The SO is set to a unique department that is based on an employee's ID number or the item's actual department.
- The SO is stored with a customer account and a deposit can be taken.



Starting a Special Order



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.

Adding a Special Order Item

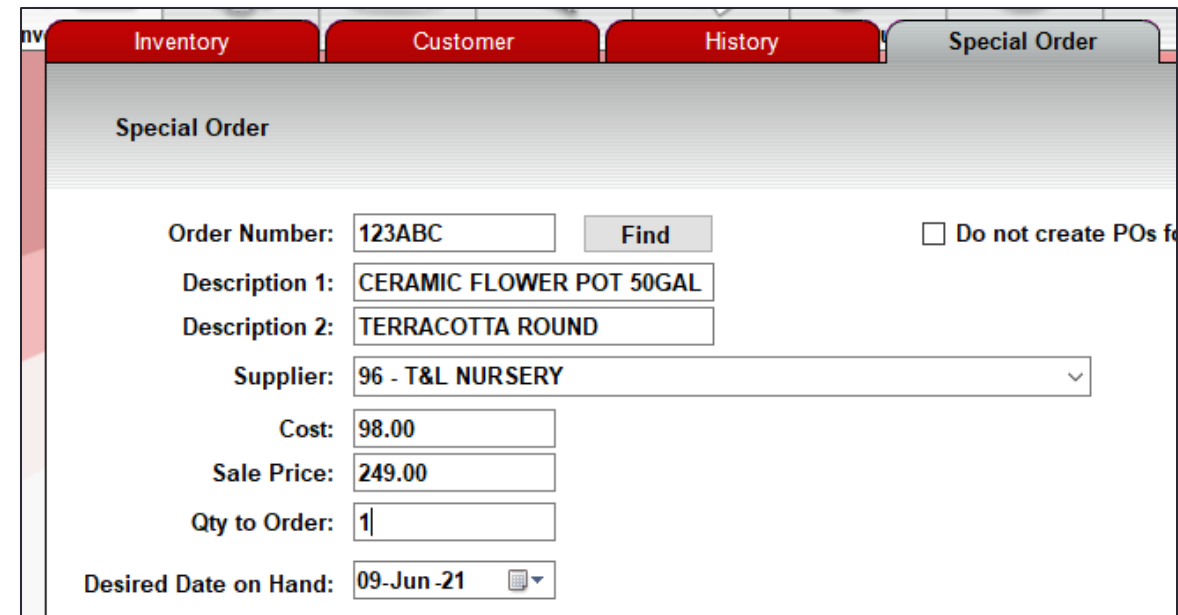
5. In the **Order Number** box, enter or scan the part number, and then click **Find**.*

- 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.

Note: The final cost will be determined when the item is received from the supplier

6. Select a **Supplier**, enter the quantity to order (**Qty to Order**), and then set the **Desired Date On Hand**.

**To search a supplier's obscure inventory, this feature must be turned on in Paladin Configuration.*

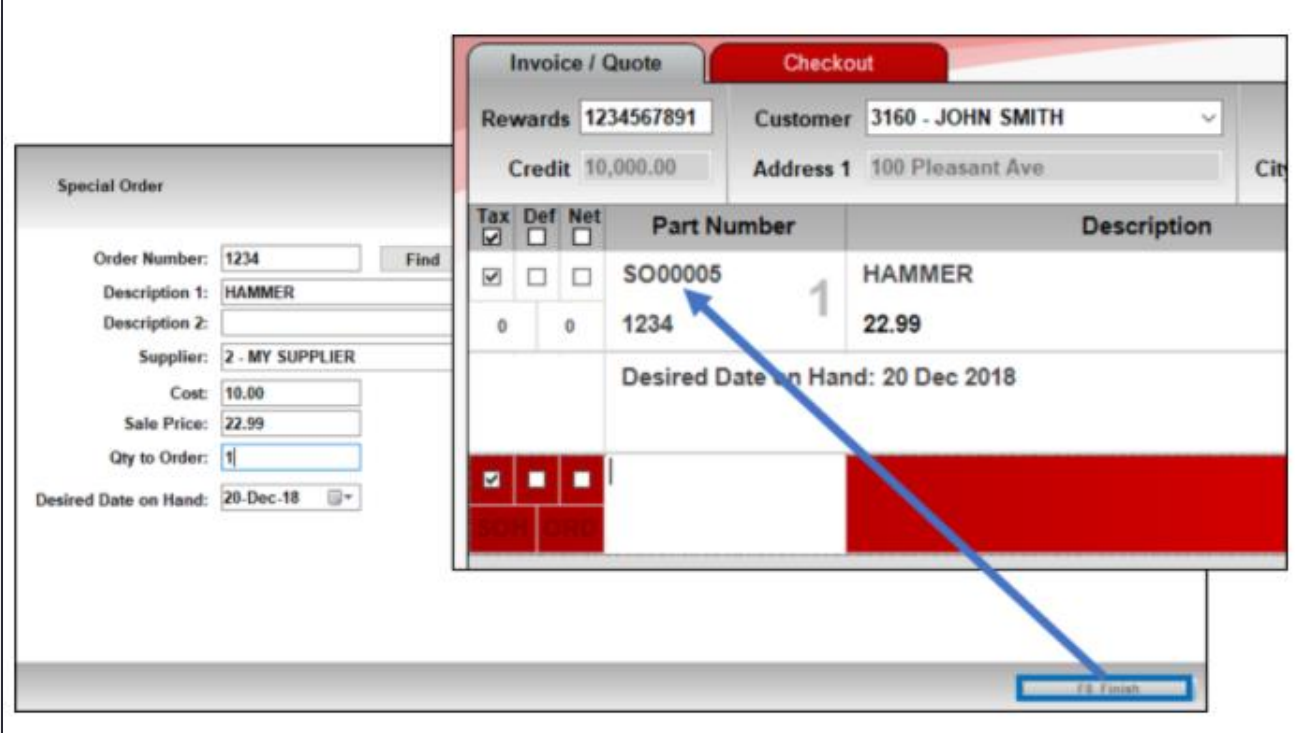


The screenshot shows a software interface with a top navigation bar containing four tabs: "Inventory", "Customer", "History", and "Special Order". The "Special Order" tab is currently selected. Below the tabs, the "Special Order" form is displayed. It includes the following fields and controls:

- Order Number:** A text box containing "123ABC" and a "Find" button to its right.
- Description 1:** A text box containing "CERAMIC FLOWER POT 50GAL".
- Description 2:** A text box containing "TERRACOTTA ROUND".
- Supplier:** A dropdown menu showing "96 - T&L NURSERY".
- Cost:** A text box containing "98.00".
- Sale Price:** A text box containing "249.00".
- Qty to Order:** A text box containing "1".
- Desired Date on Hand:** A date picker showing "09-Jun-21".
- Do not create POs for:** A checkbox that is currently unchecked.

Creating the Special Order Inventory Item

- Click **Finish** or press F8 to add the item to the special order invoice.



The screenshot displays two overlapping windows. The background window is titled 'Special Order' and contains the following fields:

- Order Number: 1234
- Description 1: HAMMER
- Description 2: (empty)
- Supplier: 2 - MY SUPPLIER
- Cost: 10.00
- Sale Price: 22.99
- Qty to Order: 1
- Desired Date on Hand: 20-Dec-18

The foreground window is titled 'Invoice / Quote' and 'Checkout'. It contains the following information:

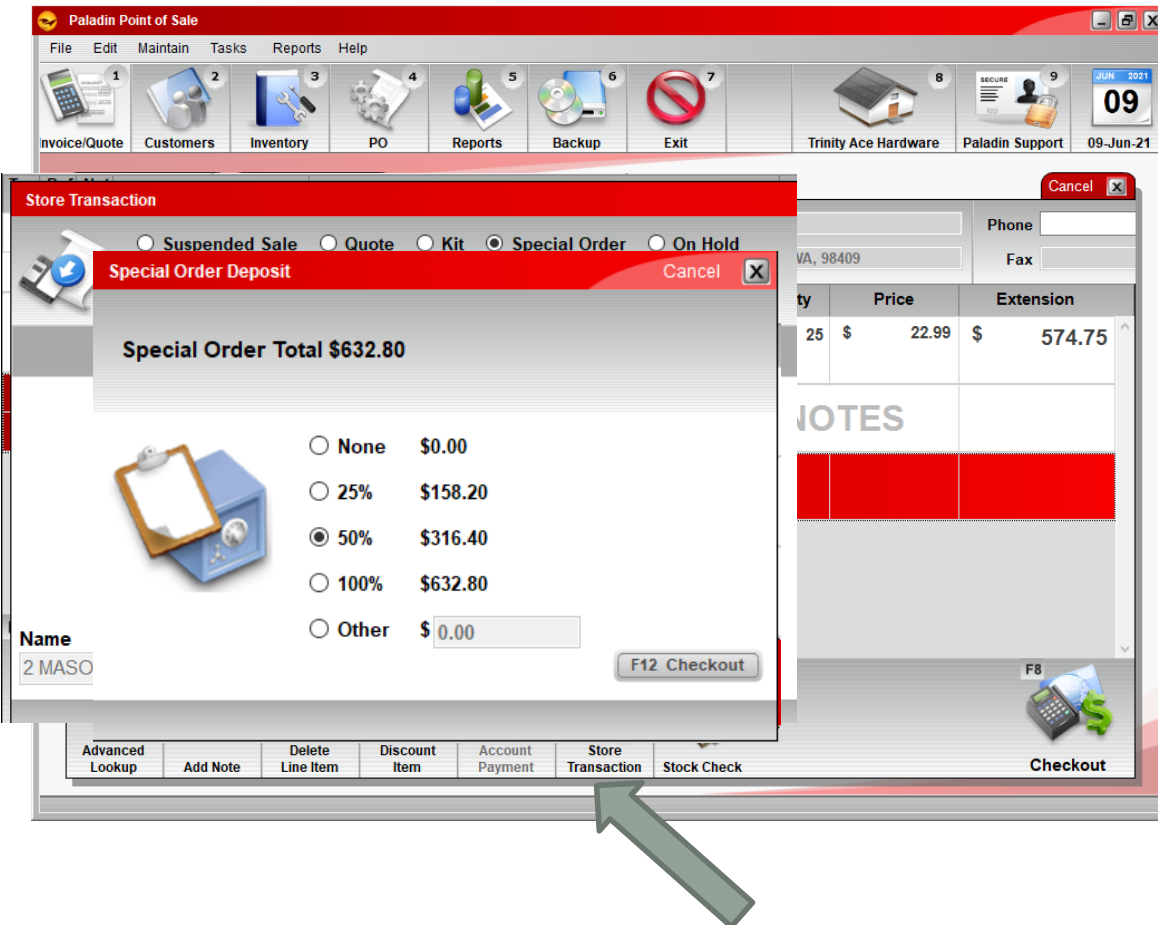
- Rewards: 1234567891
- Credit: 10,000.00
- Customer: 3160 - JOHN SMITH
- Address 1: 100 Pleasant Ave

Below this information is a table with columns: Tax, Def, Net, Part Number, and Description.

Tax	Def	Net	Part Number	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO00005	HAMMER
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1234	22.99
0	0	0		

Below the table, it says 'Desired Date on Hand: 20 Dec 2018'. At the bottom right of the 'Invoice / Quote' window, there is a red bar with buttons labeled 'FINISH' and 'F8 Finish'. A blue arrow points from the 'FINISH' button to the 'SO00005' part number in the table.

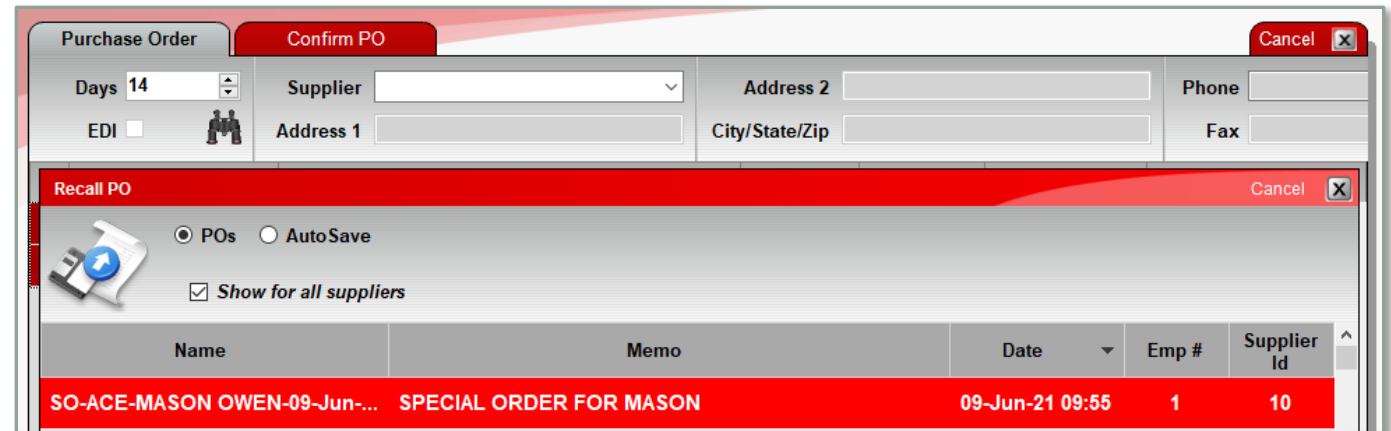
Storing a Special Order Invoice and Collecting a Deposit



1. Click **Store Transaction** or press F6.
2. Select **Special Order**. A name is automatically created from the customer name, date and supplier.
3. Optional: Enter a **Memo**.
4. Click **Store** or press F12 to save the SO invoice and create the purchase order.
5. The special order invoice will be printed.
6. Optional: Collect a SO deposit.
7. Select a payment type and complete the transaction.
8. A receipt for the deposit will be printed.

Processing the SO Purchase Order

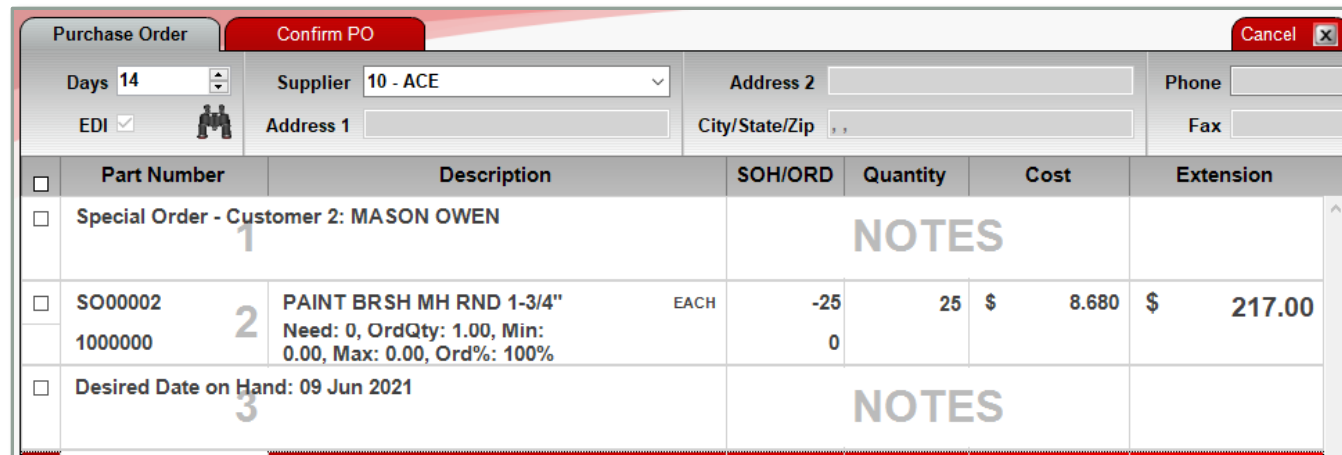
1. Open the **PO** module.
2. Click **Recall PO**, and then select the purchase order that contains the special order item.
3. Click **Confirm PO** or press F8.
4. Click **Buy** or press F1.

The 'Confirm PO' window shows the following details:

- Days:** 14
- Supplier:** (dropdown menu)
- Address 1:** (text field)
- Address 2:** (text field)
- City/State/Zip:** (text field)
- Phone:** (text field)
- Fax:** (text field)
- EDI:** ☐
- Recall PO:** ☒ POs ☐ AutoSave
- Show for all suppliers:** ☒
- Table:**

Name	Memo	Date	Emp #	Supplier Id
SO-ACE-MASON OWEN-09-Jun-...	SPECIAL ORDER FOR MASON	09-Jun-21 09:55	1	10



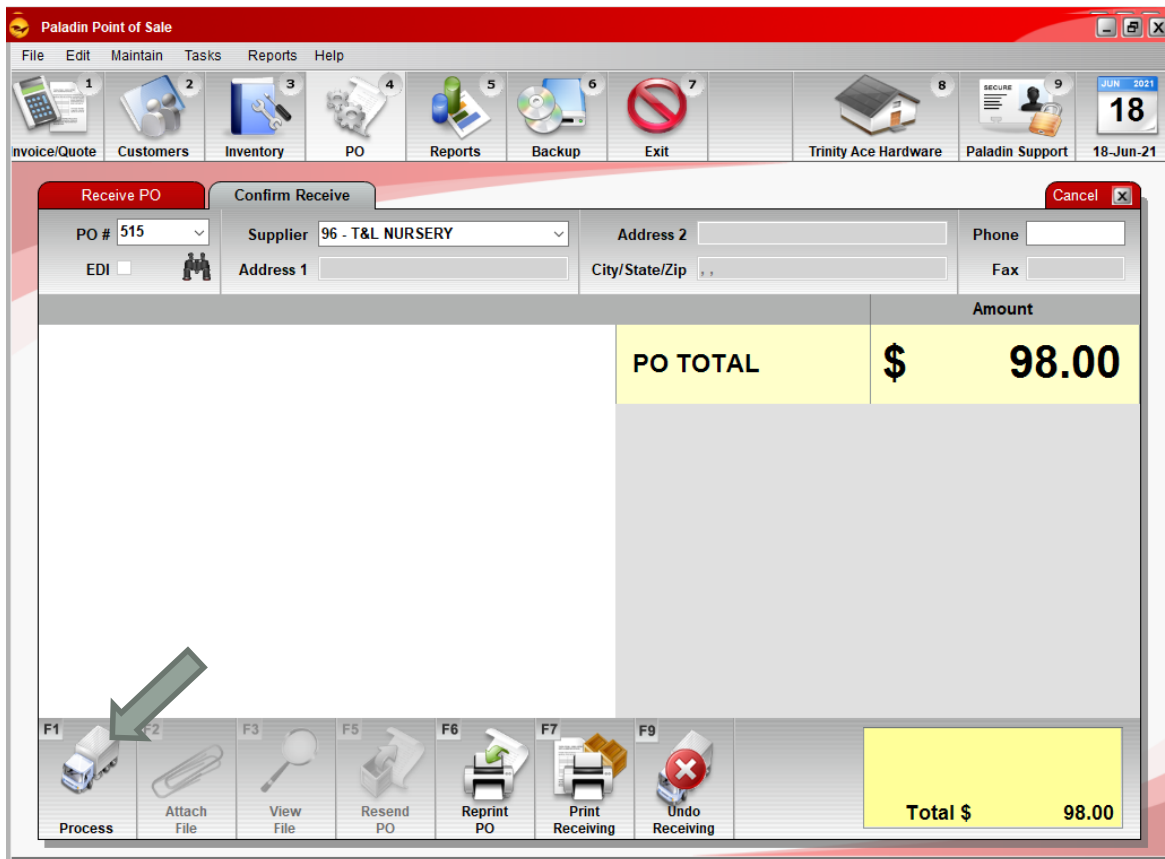
The 'Confirm PO' window shows the following details:

- Days:** 14
- Supplier:** 10 - ACE
- Address 1:** (text field)
- Address 2:** (text field)
- City/State/Zip:** (text field)
- Phone:** (text field)
- Fax:** (text field)
- EDI:** ☒
- Table:**

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					



Receiving a PO for a Special Order



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Trinity Ace Hardware 9 Paladin Support 18-Jun-21

Receive PO Confirm Receive Cancel

PO # 515 Supplier 96 - T&L NURSERY Address 2 Phone

EDI Address 1 City/State/Zip Fax

	Amount
PO TOTAL	\$ 98.00

F1 Process F2 Attach File F3 View File F5 Resend PO F6 Reprint PO F7 Print Receiving F9 Undo Receiving

Total \$ 98.00

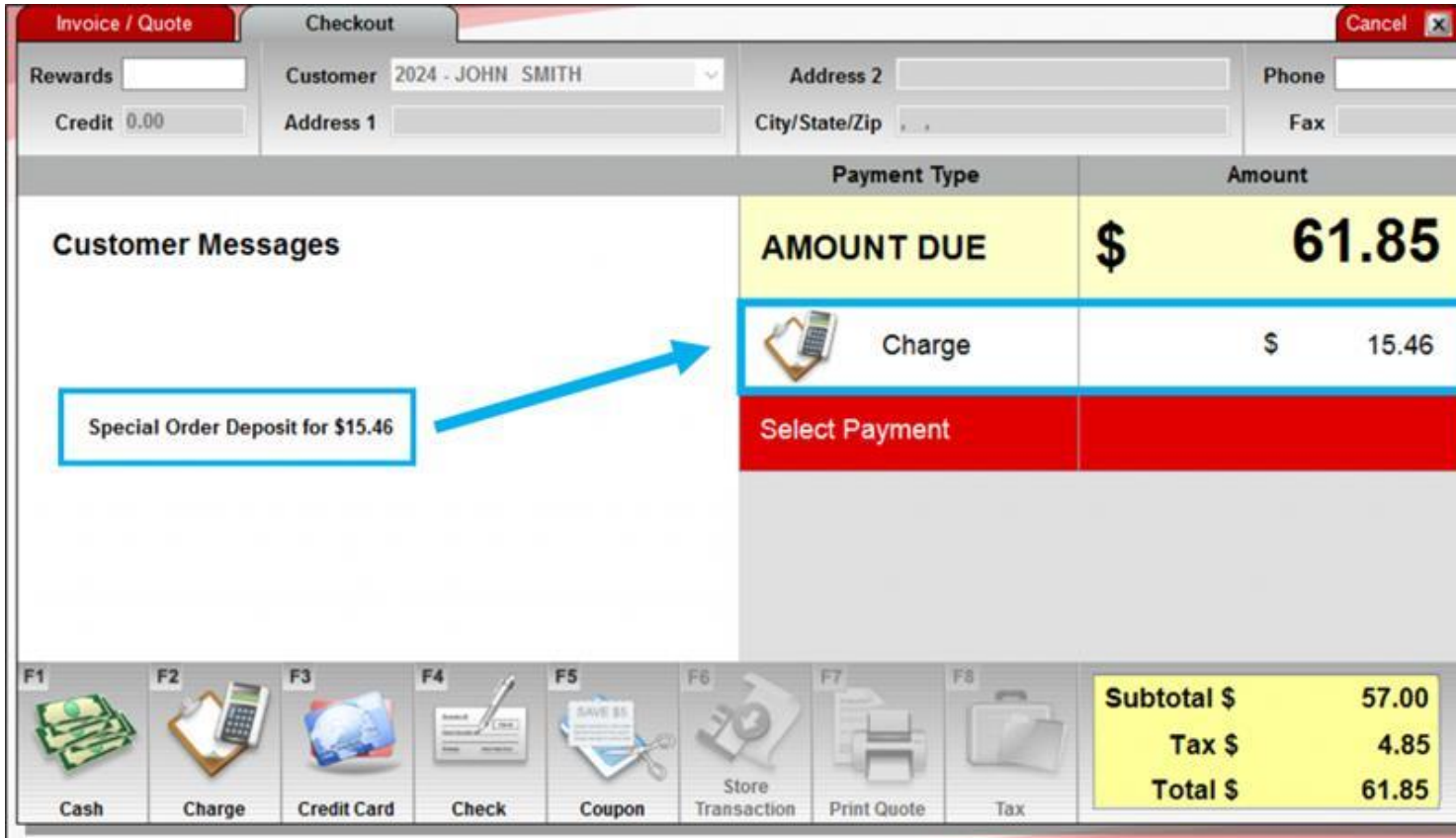
1. Open the **PO** module.
2. Click **Find PO** and open the purchase order that contains the special order items.
3. Verify that the received item quantities and costs on the purchase order are correct.
4. On the **Receive PO** tab, click **Process** or press F8.
5. In the **Confirm Receive** tab, click **Process** or press F1.

Applying Freight Costs to a Special Order




1. In the **PO Freight Cost** window, enter the **Freight Cost**, and then click **OK** or press F8.
2. In the **Special Order** window:
 - Click **Yes** to apply the freight cost to your special order. This adds the freight cost as a line item on the special order invoice and is paid by the customer.
 - Click **No**, if the store will be incurring the freight charge. This will add the cost to the purchase order.

Completing a Special Order



The screenshot shows the 'Invoice / Quote' module in a 'Checkout' state. The 'Customer' field is set to '2024 - JOHN SMITH'. The 'Amount DUE' is \$61.85. A 'Special Order Deposit for \$15.46' is highlighted with a blue box and an arrow pointing to the 'Charge' row in the payment table. 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 Subtotal (\$57.00), Tax (\$4.85), and Total (\$61.85).

Payment Type	Amount
AMOUNT DUE	\$ 61.85
 Charge	\$ 15.46
Select Payment	

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

1. Open the **Invoice/Quote** module.
2. Select the **Customer**.
3. Click **Recall Transaction** or press **F6**.
4. In the **Recall Transaction** window, select **Special Order**.
5. Highlight the special order, and then click **F12 Recall** to open the special order invoice.

(The deposit amount will automatically be credited on the invoice and processed as a charge)

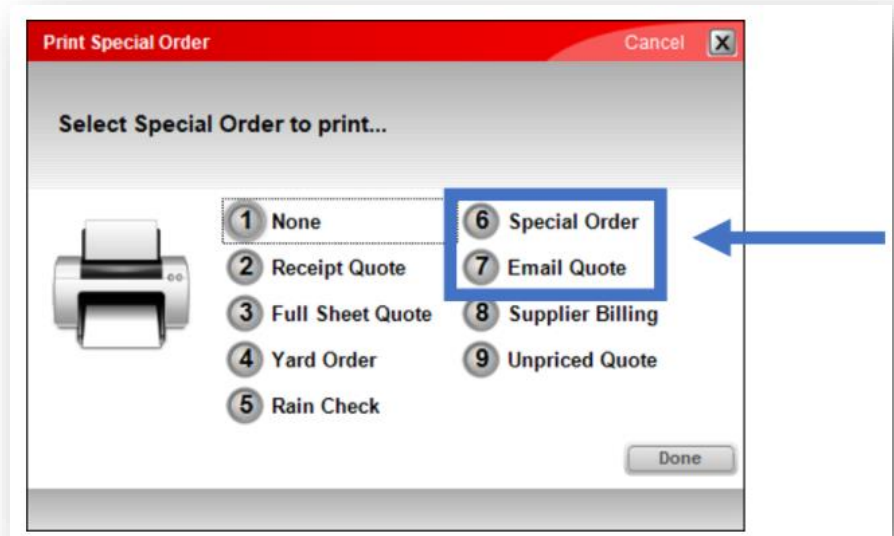
6. Optional: Edit, add, or delete items in the invoice.
7. Complete the checkout process.

Allowing Changes to Special Orders

1. On the **File** menu, click **Setup**.
2. Click the **Company** tab.
3. In the **Special Orders** pane, select the **Allow Special Orders to Be Edited** checkbox.
4. Click **Save**, and then click **Close**.

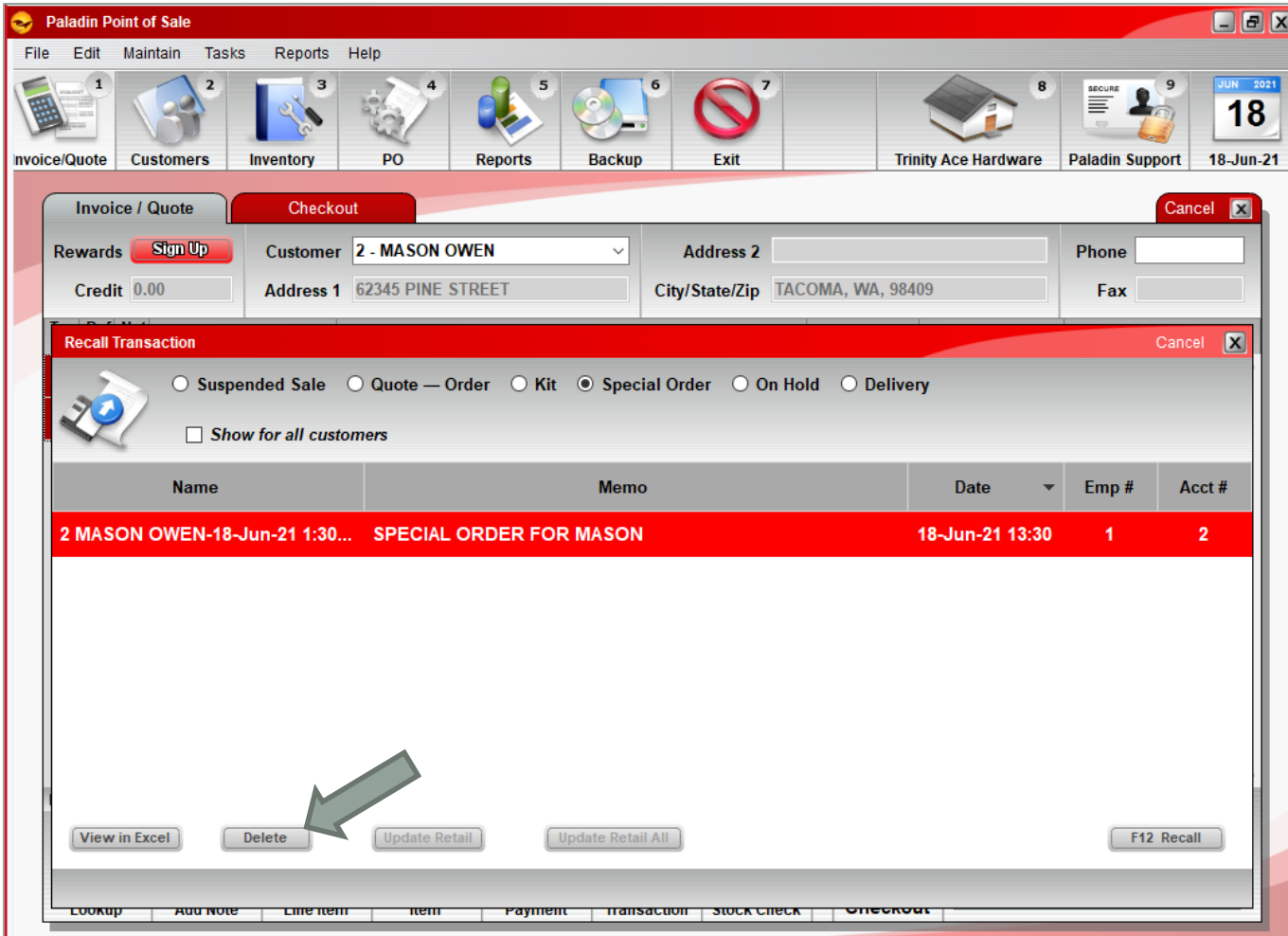
Important: Before editing a special order, be aware:

- Modified special orders, will no longer match the customer's original copy and the associated purchase order will not be updated.
- Increasing an item quantity, may require a separate purchase order for the additional items.
- Reducing item quantities may require you 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. You can do this from the **Print Special Order** window that appears when you save your changes.

Deleting a Special Order



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Trinity Ace Hardware 9 Paladin Support 18-Jun-21

Invoice / Quote Checkout Cancel

Rewards Sign Up Credit 0.00 Customer 2 - MASON OWEN Address 2 Address 1 62345 PINE STREET City/State/Zip TACOMA, WA, 98409 Phone Fax

Recall Transaction Cancel

☐ Suspended Sale ☐ Quote — Order ☐ Kit ☒ Special Order ☐ On Hold ☐ Delivery

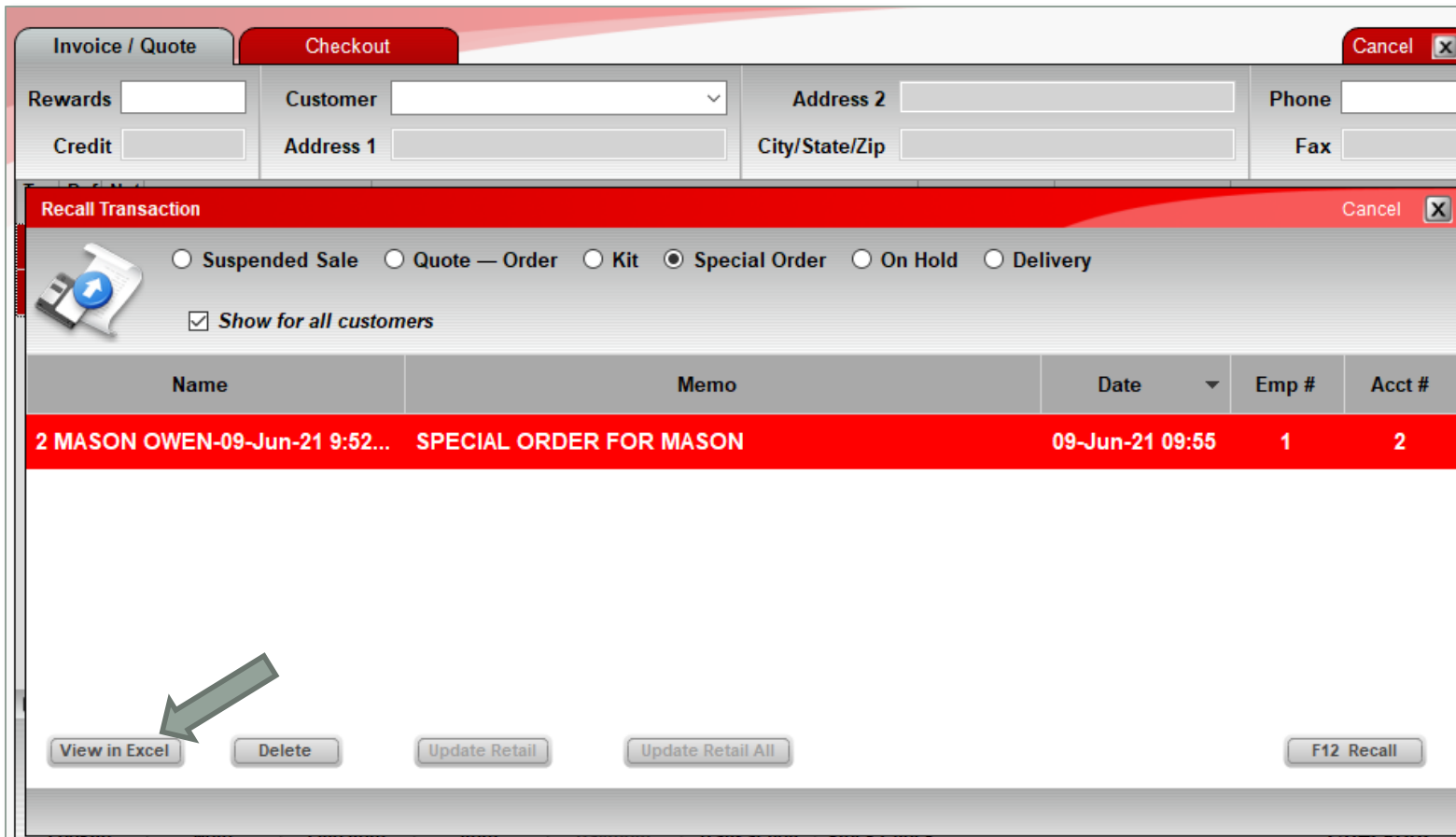
☐ Show for all customers

Name	Memo	Date	Emp #	Acct #
2 MASON OWEN-18-Jun-21 1:30...	SPECIAL ORDER FOR MASON	18-Jun-21 13:30	1	2

View in Excel Delete Update Retail Update Retail All F12 Recall

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.


Special Order Reporting



Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone
Credit Address 1 City/State/Zip Fax

Recall Transaction Cancel

 ☐ Suspended Sale ☐ Quote — Order ☐ Kit ☒ Special Order ☐ On Hold ☐ Delivery

☒ Show for all customers

Name	Memo	Date	Emp #	Acct #
2 MASON OWEN-09-Jun-21 9:52...	SPECIAL ORDER FOR MASON	09-Jun-21 09:55	1	2

View in Excel Delete Update Retail Update Retail All F12 Recall

1. Open **Invoice/Quote** module.
2. Click **Recall Transaction** or press F6.
3. Select **Special Order** option.
4. Click **View in Excel**.

Special Order Setup Options

Special Orders

- ☒ 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

1. Contact Paladin Support to enable Special Orders.
2. On the **File** menu, click **Setup**.
3. Click the **Company** tab.
4. Scroll down to the **Special Orders** pane.
5. Make your desired selections and click **Save**.

Learn more

- Paladin Help Portal (<http://portal.paladinpos.com>)
 - [Options: Special Orders](#)
 - [Best Practices: Special Orders](#)
 - [How to create a special order](#)
 - [How to complete a special order](#)
 - [How to delete a stored special order](#)
 - [How to manually receive a purchase order for a special order](#)
 - [How to print all invoice, quotes and special orders for a specific customer on the large form](#)
 - [How to set a special order deposit amount](#)
 - [How to allow changes to a special order](#)

Q+A

Next Webinar:

*Clearing Up the Clouds: How Paladin
Works in the Cloud*

July 13 @ 9am PT

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