



Paladin Pointers: New Purchase Order Features

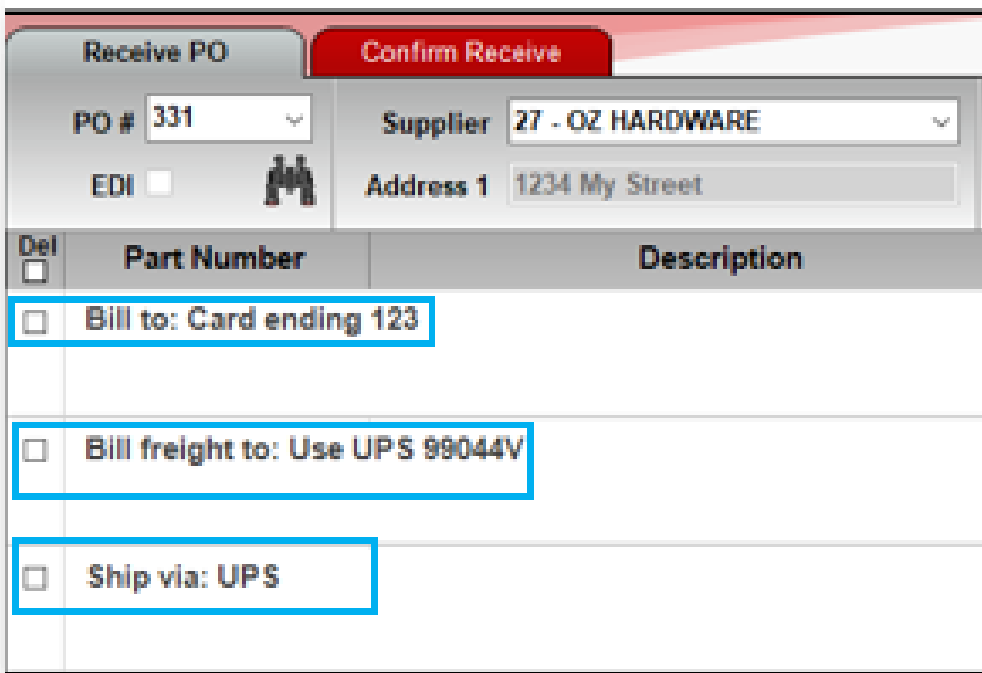
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Chief Experience Officer
February 22, 2022

WHAT YOU'LL LEARN

With these new PO features, you will discover how to:

- Add supplier instructions/terms
- Create PO reminder notes
- Create a PO email record
- Apply supplier-specific costs

Adding instructions to a PO



Del	Part Number	Description
<input type="checkbox"/>		Bill to: Card ending 123
<input type="checkbox"/>		Bill freight to: Use UPS 99044V
<input type="checkbox"/>		Ship via: UPS

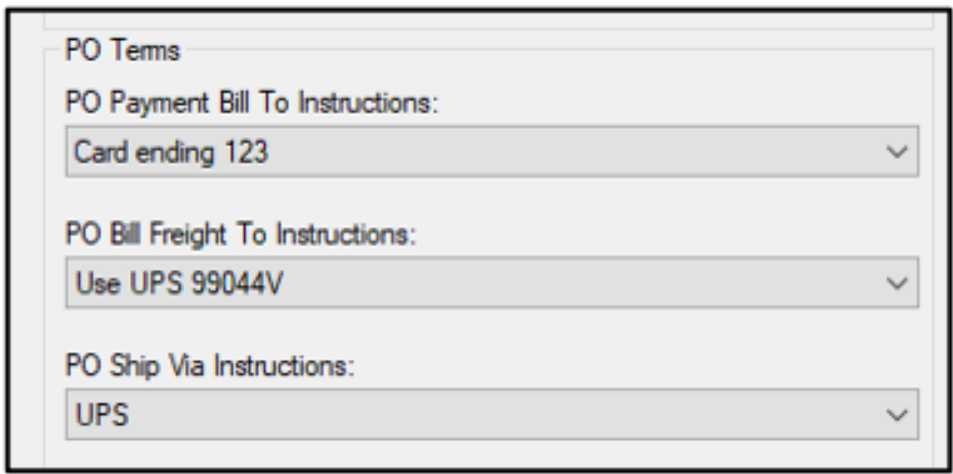
- By adding instructions to a purchase order, the supplier can view and print the instructions intended specifically for them.
- There are three simple steps for setting up instructions for a purchase order:
 1. Setup default purchase order supplier instructions
 2. Add PO instructions to the desired suppliers
 3. Apply supplier instructions to a purchase order

Step 1: Setup PO supplier instructions

Payment Bill to 1	Store
Payment Bill to 2	Owner
Payment Bill to 3	Card ending 123
Payment Bill to 4	Card ending 445
Bill Freight to 1	Prepay and Bill
Bill Freight to 2	Freight Collect
Bill Freight to 3	Use UPS 99044V
Bill Freight to 4	Free Freight
Ship Via 1	FedEx
Ship Via 2	USPS
Ship Via 3	UPS
Ship Via 4	Store Truck

- On the **File** menu, click **Setup**, click the **Company** tab, and scroll to the **Purchase Orders** pane. Enter instructions in each box.
 - Up to four drop-down PO supplier instructions can be added for:
 - Payment Bill To
 - Bill Freight To
 - Ship Via
- Note: If not all instructions are needed, any of the boxes can be left blank.
- After instructions have been set, scroll down and click **Save**. Then close and restart Paladin.

Step 2: Add PO instructions to Suppliers



The screenshot shows a dialog box titled "PO Terms". It contains three sections, each with a label and a drop-down menu:

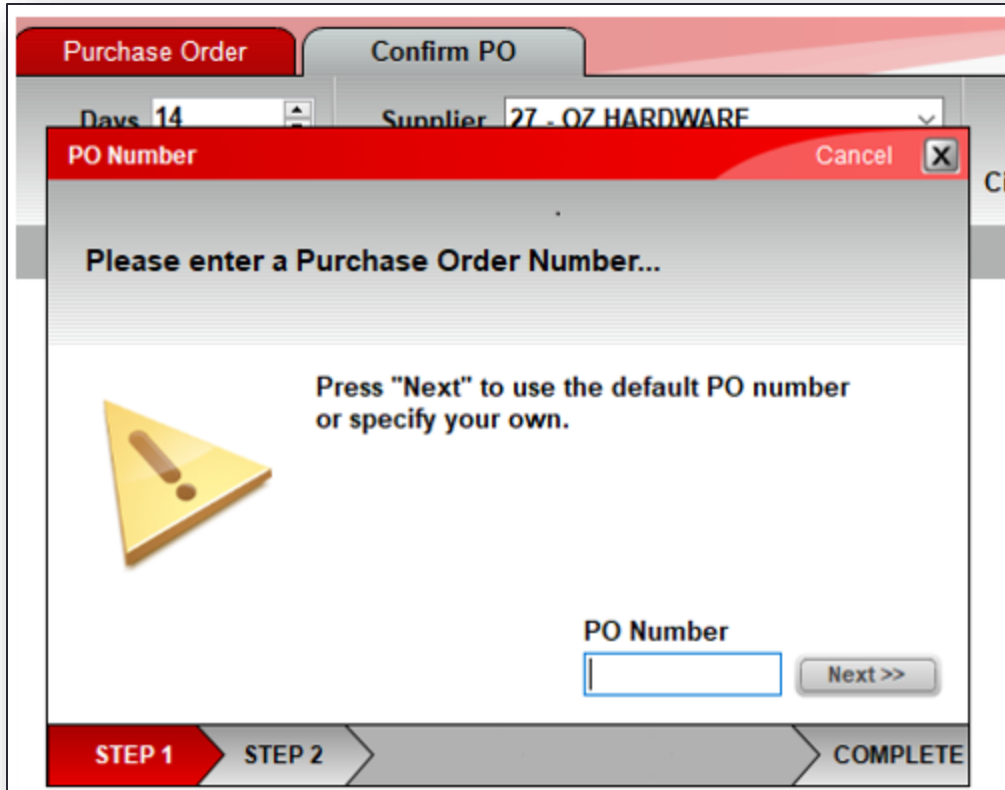
- PO Payment Bill To Instructions:** The drop-down menu shows "Card ending 123".
- PO Bill Freight To Instructions:** The drop-down menu shows "Use UPS 99044V".
- PO Ship Via Instructions:** The drop-down menu shows "UPS".

- The pre-set instructions in the **Company** tab are now available to assign to suppliers.
- Next you can assign customized instructions for each supplier.
- On the **File** menu, click **Setup**, and then click the **Supplier** tab.
- In the **Suppliers** pane, select a supplier from the list. Then, scroll to the bottom of the pane where the **PO Terms** (instructions) can be selected from the drop-down menu.

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

Step 3:

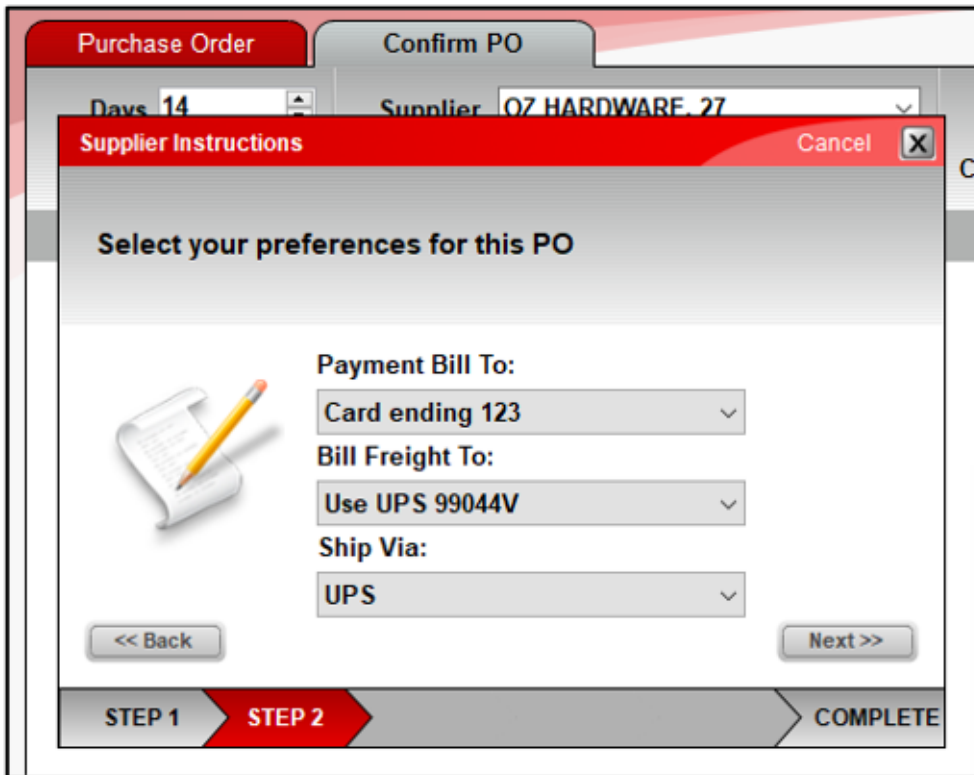
Apply supplier instructions to a PO



- In the **Purchase Order** module, either recall a stored PO or select a **Supplier** and create a new PO.
- If it's a new PO, add items to the PO.
- When the order is ready to send, click **Confirm PO** or press **F8**. Then click **Buy** or press **F1** to complete the purchase order.
- When the **PO Number** window opens, enter a **PO Number**, or Paladin will auto generate a unique PO number.
- Click **Next>>**.

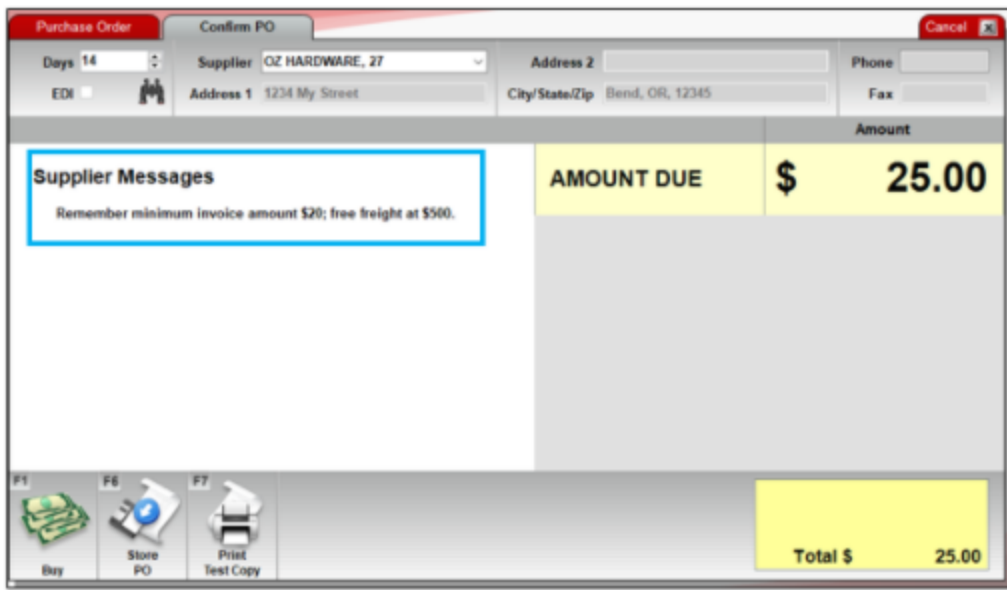
Step 3 – Continued: Apply supplier instructions to a PO

- If you set supplier specific instructions for this supplier, a **Supplier Instructions** window opens, and the default instructions will be displayed.
- These instructions may be altered, or if satisfied with the default instructions, click **Next>>**.
- The instructions are added to the purchase order before it is printed or sent to the supplier.
- When you recall the purchase order, the instructions will reappear as notes on the purchase order.




Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	Bill to: Card ending 123			NOTES		
<input type="checkbox"/>	Bill freight to: Use UPS 99044V			NOTES		
<input type="checkbox"/>	Ship via: UPS			NOTES		
<input type="checkbox"/>	PART1 4	HAMMER	EACH	5	\$ \$ 5.000	\$ 25.00
	PART1	Old Cost: \$5.000 Old Sell: \$42.00 Mar: 88% Ref Mar: 00% New Sell: \$42.00 Mar: 88%	0			

Optional PO reminder note



Purchase Order Confirm PO

Days 14 Supplier OZ HARDWARE, 27 Address 2 Phone
EDI Address 1 1234 My Street City/State/Zip Bend, OR, 12345 Fax

Supplier Messages
Remember minimum invoice amount \$20; free freight at \$500.

	Amount
AMOUNT DUE	\$ 25.00

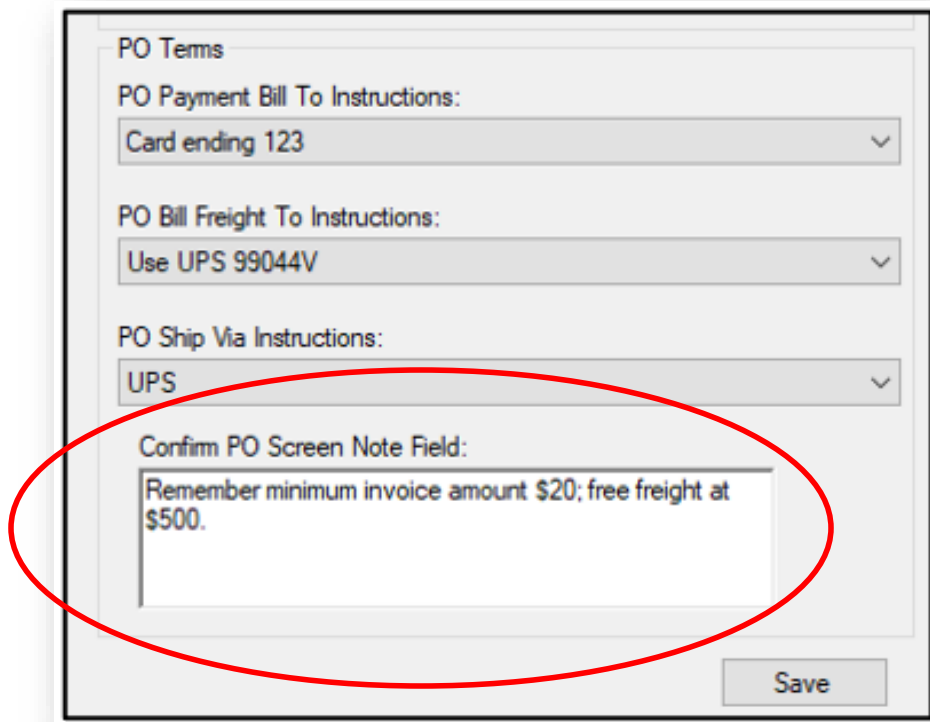
F1 Buy F6 Store PO F7 Print Test Copy

Total \$ 25.00

- A reminder note can be created to add instructions and information on the **Confirm PO** tab of the **PO** module before you send the purchase order to the supplier.

Note: This feature is similar to setting a **Checkout Screen Note** in the **Customers** module.

Creating a PO reminder note



PO Terms

PO Payment Bill To Instructions:
Card ending 123

PO Bill Freight To Instructions:
Use UPS 99044V

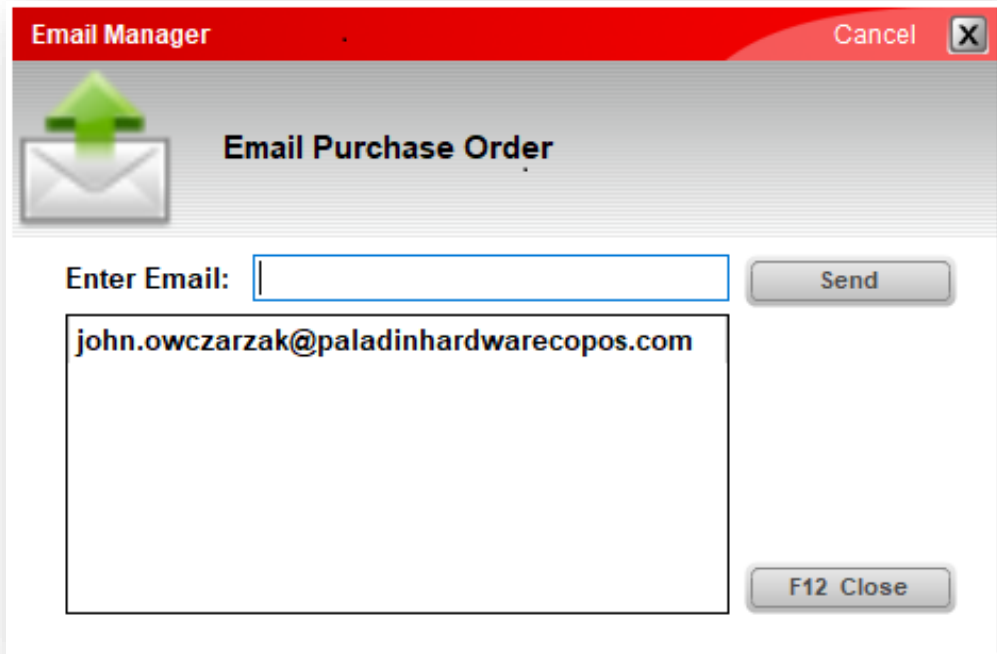
PO Ship Via Instructions:
UPS

Confirm PO Screen Note Field:
Remember minimum invoice amount \$20; free freight at \$500.

Save

- To create a purchase order reminder note, on the **File** menu, click **Setup**, and then click the **Supplier** tab.
- In the **Suppliers** pane, select a supplier from the list. Then, scroll to the bottom of the pane, and under **PO Terms**, type your note in the **Confirm PO Screen Note Field** box and click **Save**.
- Close and restart Paladin.

Sending a PO via email



Note: An email record note is not added if you resend the PO in the **Receive PO** mode using the **Reprint PO** [F6] feature.

- To send a purchase order as an email to a supplier, after you process the purchase order, in the **PO Complete** window, click **Email**.
- The **Email Manager** window opens, and you can send an email to the email address on file, or you can enter a new email address in the **Enter Email:** box.
- Click **Send** to email the purchase order. An **Email sent** message will appear at the bottom of the **Email Manager** window.

PO email record details

Receive PO

Confirm Receive

PO # 333

Supplier 27 - OZ HARDWARE

EDI ☐

Address 1 1234 My Street

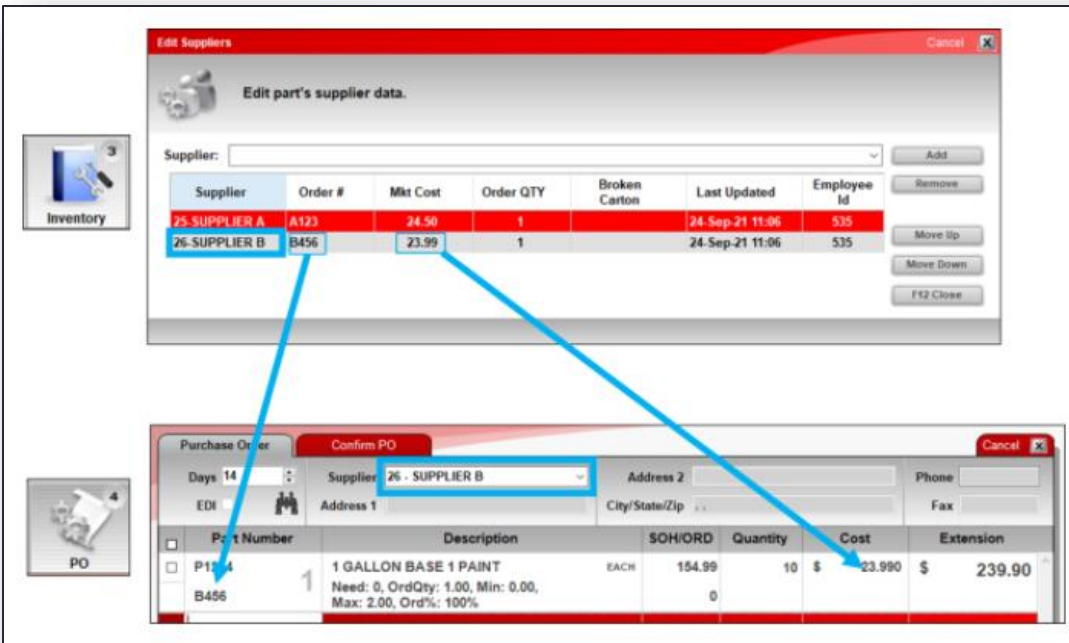
Cit

Del <input type="checkbox"/>	Part Number	Description
<input type="checkbox"/>	Bill freight to: Use UPS 99044V	
<input type="checkbox"/>	Ship via: UPS	
<input type="checkbox"/>	PART1 4	HAMMER
	PART1	Old Cost: \$5.000 Old Sell: \$42.00 Mar: 88% Ref Mar: 00% New Sell: \$42.00 Mar: 88%
<input type="checkbox"/>	04-Oct@12:55, 1-Paladin S, john.owczarzak@paladinhardwareco...	

- When a purchase order is emailed to a supplier, a note with the following email details is added to the purchase order as a note:
 - **Date** email was sent
 - **Time** email was sent
 - **Employee ID, first name & last name initial**
 - The **Email Address** that the email was sent to

Apply supplier-specific costs on purchase orders

- Market costs can be set for EDI and non-EDI suppliers alike and are automatically applied on POs, when available.
- There are three simple steps for activating and setting up supplier-specific market costs:
 1. Turn on the supplier-specific market cost feature
 2. Set market costs and other order data for suppliers
 3. Apply supplier costs during ordering



Edit Suppliers

Edit part's supplier data.

Supplier:

Buttons: Add, Remove, Move Up, Move Down, F12 Close

Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated	Employee Id
25-SUPPLIER A	A123	24.50	1		24-Sep-21 11:06	535
26-SUPPLIER B	B456	23.99	1		24-Sep-21 11:06	535

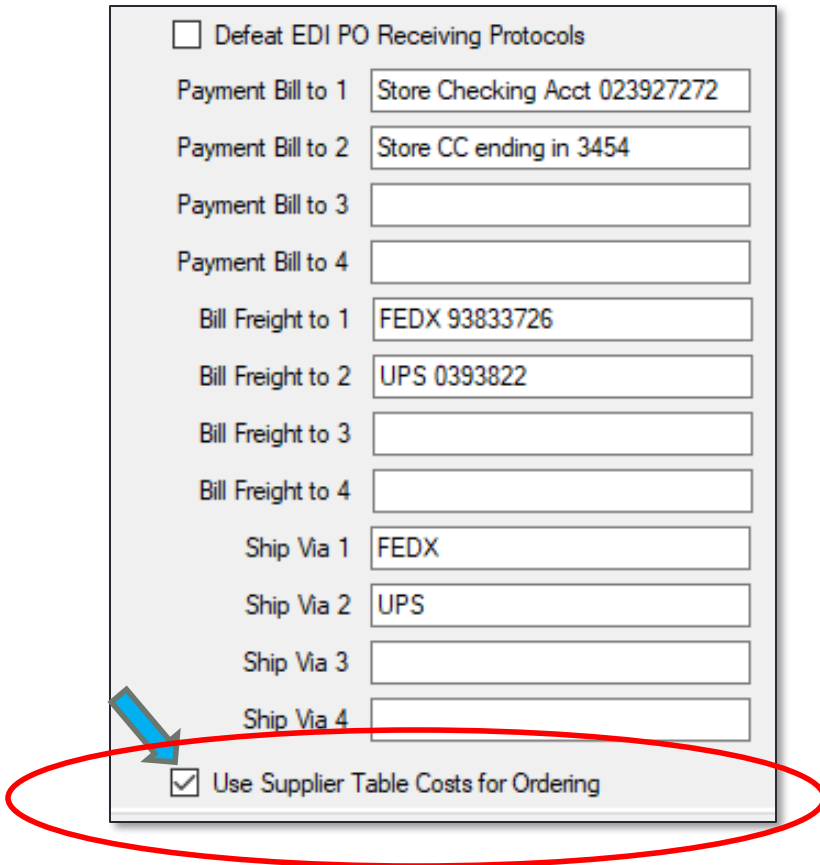
Purchase Order

Confirm PO

Days: 14, Supplier: 26-SUPPLIER B, Address 2, Phone, Address 1, City/State/Zip, Fax

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
P1234	1 GALLON BASE 1 PAINT	EACH 154.99	10	\$ 23.990	\$ 239.90
B456	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	0			

Step 1: Activating supplier-specific costs



☐ Defeat EDI PO Receiving Protocols

Payment Bill to 1

Payment Bill to 2

Payment Bill to 3

Payment Bill to 4

Bill Freight to 1

Bill Freight to 2

Bill Freight to 3

Bill Freight to 4

Ship Via 1

Ship Via 2

Ship Via 3

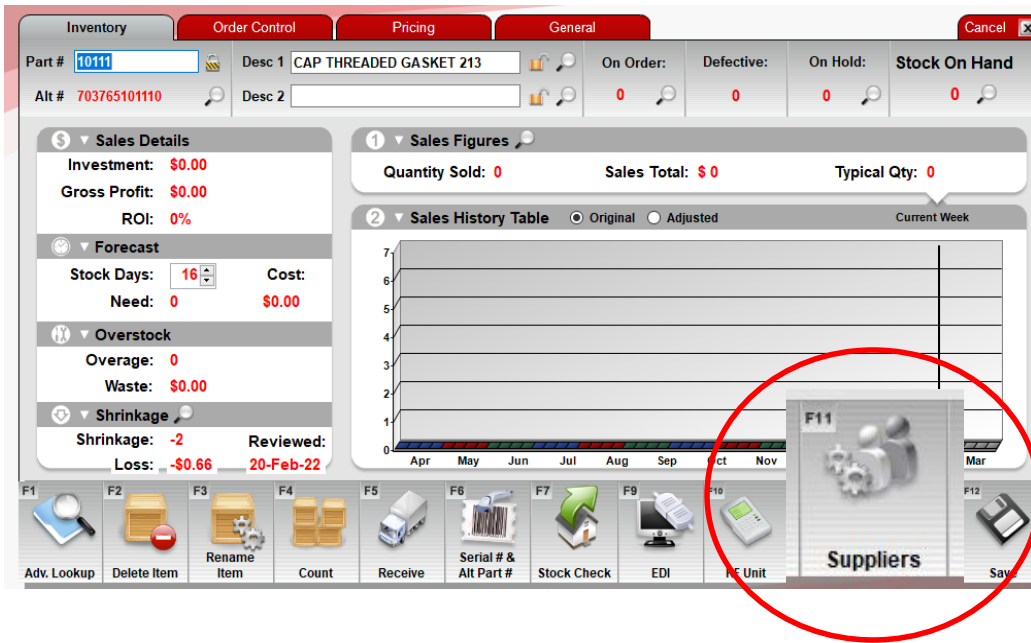
Ship Via 4

☒ Use Supplier Table Costs for Ordering

- To turn on the supplier-specific market cost feature, on the **File** menu, click **Setup**, click the **Company** tab, and scroll to the **Purchase Orders** pane.
- Select the **Use Supplier Table Costs for Ordering** checkbox and click **Save**.
- Then, close the window and restart Paladin.

Step 2:

Setting the market costs for different suppliers

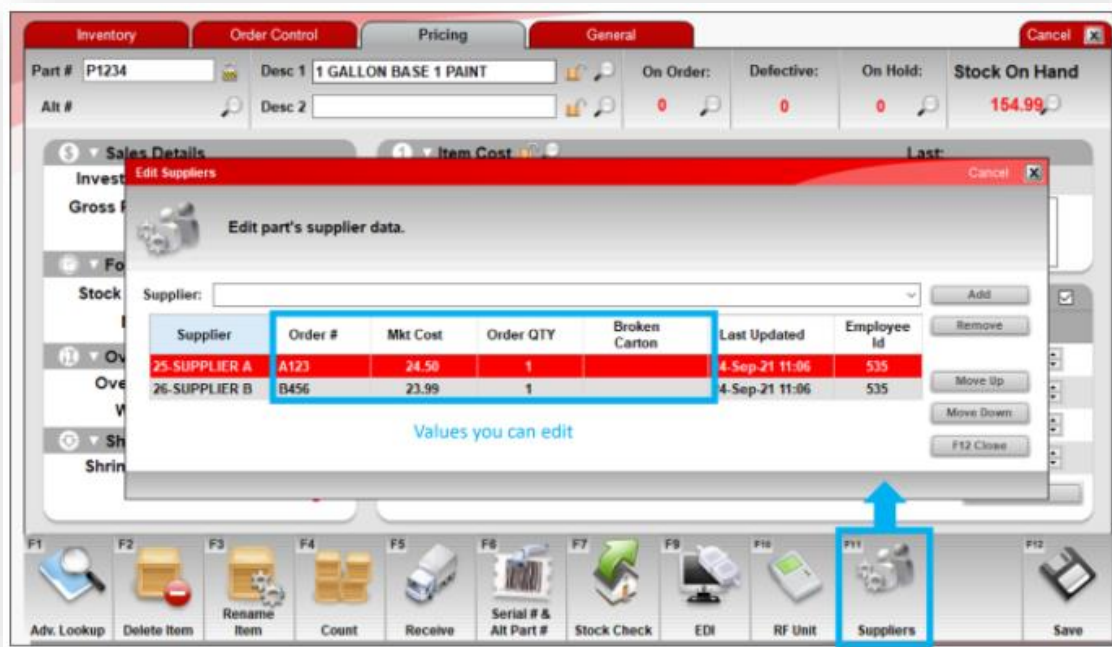


The screenshot displays the 'Inventory' module interface. At the top, there are tabs for 'Inventory', 'Order Control', 'Pricing', and 'General'. Below these, the 'Part #' is set to 10111, and the description is 'CAP THREADED GASKET 213'. The 'Alt #' is 703765101110. The 'On Order' field is 0, 'Defective' is 0, 'On Hold' is 0, and 'Stock On Hand' is 0. The 'Sales Details' section shows 'Investment: \$0.00', 'Gross Profit: \$0.00', and 'ROI: 0%'. The 'Forecast' section shows 'Stock Days: 16', 'Need: 0', and 'Cost: \$0.00'. The 'Overstock' section shows 'Overage: 0' and 'Waste: \$0.00'. The 'Shrinkage' section shows 'Shrinkage: -2' and 'Loss: -\$0.66'. The 'Sales Figures' section shows 'Quantity Sold: 0', 'Sales Total: \$0', and 'Typical Qty: 0'. The 'Sales History Table' is currently empty. At the bottom, there is a ribbon with buttons for 'Adv. Lookup', 'Delete Item', 'Rename Item', 'Count', 'Receive', 'Serial # & Alt Part #', 'Stock Check', 'EDI', 'F11 Unit', 'Suppliers', and 'Save'. The 'Suppliers' button is circled in red.

- The following values can be set for individual suppliers on an inventory item:
 - Order #
 - Mkt Cost
 - Order QTY
 - Broken Carton
- To set this order data, click the **Inventory module** and open the inventory item.
- Then, on the bottom, ribbon, click **Suppliers** or press F11.

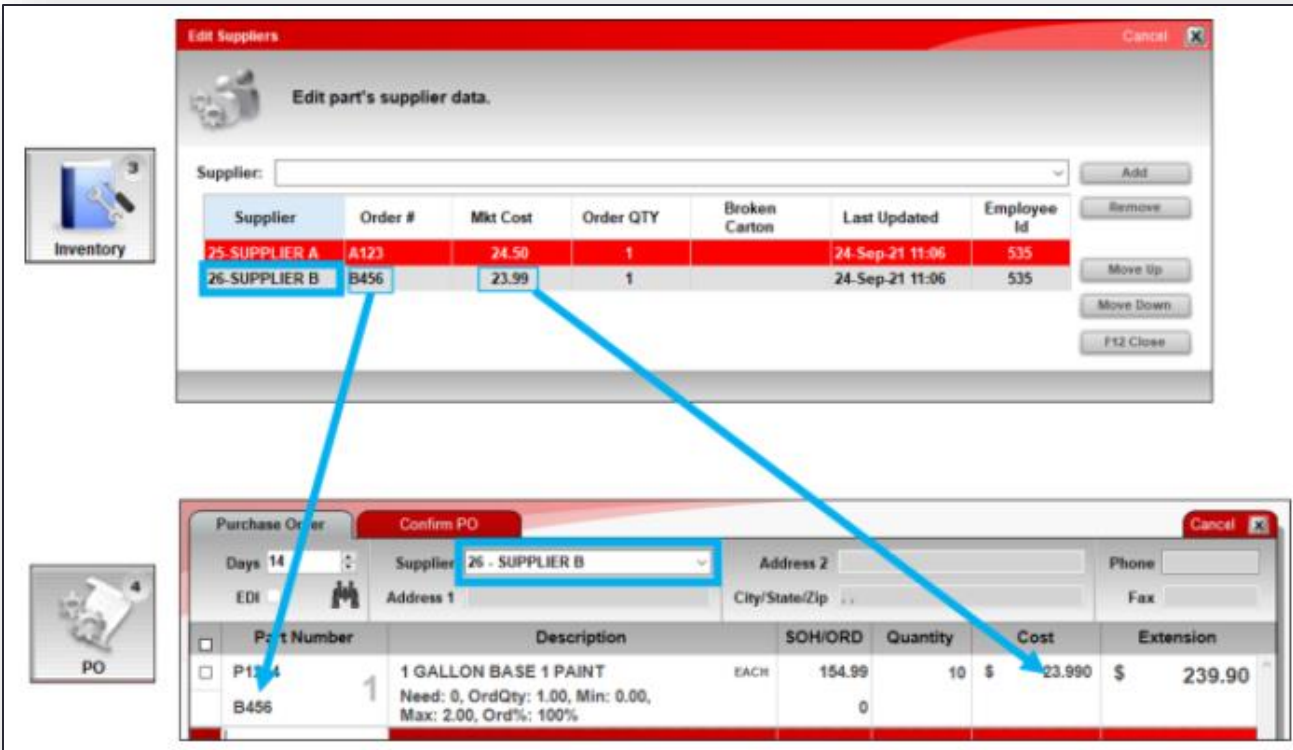
Step 2 continued: Setting the market cost and other order data for suppliers

- To edit a supplier's market cost, click its **Mkt Cost** value and enter a new cost. Do the same with other editable values.
- To add a new supplier to the list, in the **Supplier** list, select the supplier and click **Add**.
- When you are finished with your changes, click **Close** or press **F12**.



Step 3: Applying supplier costs during ordering

- If you set a supplier's market cost, this cost will be automatically used when you create a purchase for this supplier.
- If a supplier market cost is *not set* or *is zero*, the default cost is used.
- The default cost is the *first non-zero value* in this list from the **Pricing** tab:
 - Mkt cost
 - Last cost
 - Avg cost



The screenshot illustrates the process of applying supplier costs during ordering. It shows two windows: 'Edit Suppliers' and 'Purchase Order'.

Edit Suppliers Window:

Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated	Employee Id
25-SUPPLIER A	A123	24.50	1		24-Sep-21 11:06	535
26-SUPPLIER B	B456	23.99	1		24-Sep-21 11:06	535

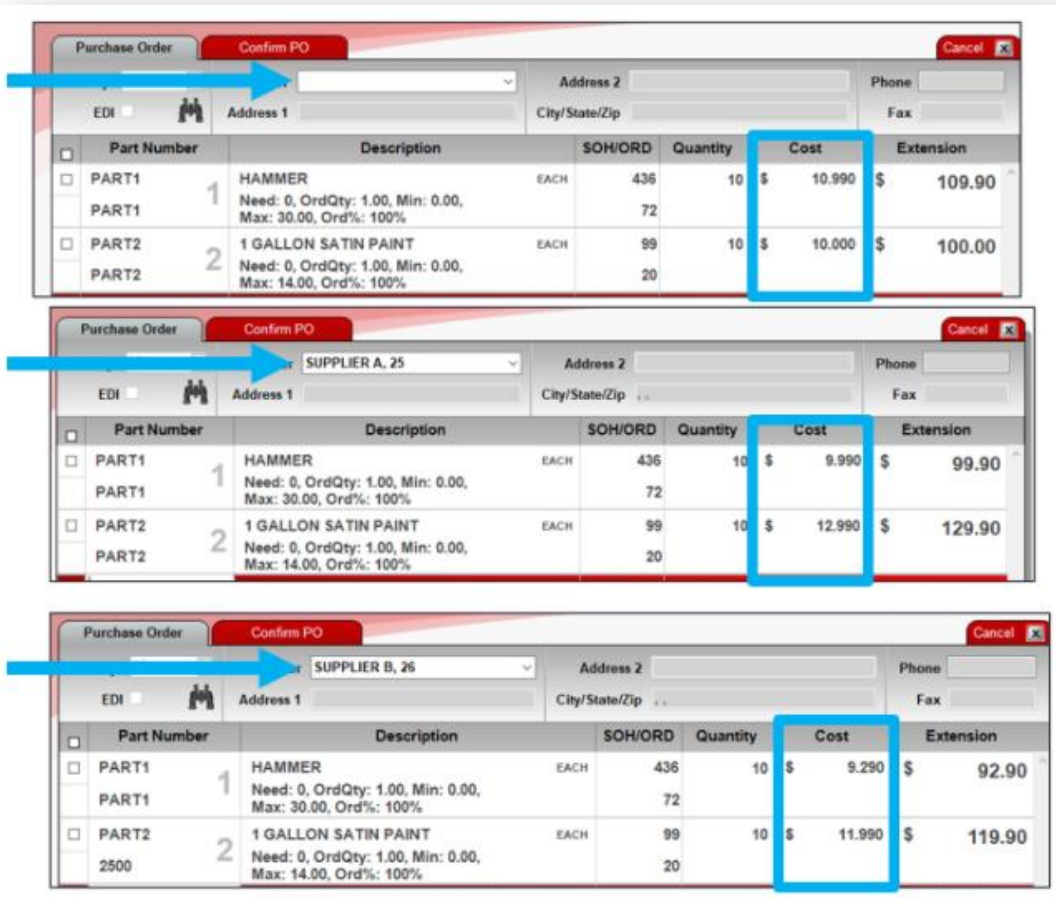
Purchase Order Window:

Supplier: 26 - SUPPLIER B

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
P1304 B456	1 GALLON BASE 1 PAINT Need: 0, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	EACH 154.99 0	10	\$ 23.990	\$ 239.90

Blue arrows indicate the flow of data: one arrow points from the 'Supplier' dropdown in the 'Purchase Order' window to '26-SUPPLIER B' in the 'Edit Suppliers' window, and another arrow points from the 'Mkt Cost' value '23.99' in the 'Edit Suppliers' window to the 'Cost' column in the 'Purchase Order' table.

Step 3 continued: Applying supplier costs during ordering



Purchase Order - Confirm PO

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1 1	HAMMER Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%	EACH 436	10	\$ 10.990	\$ 109.90
PART1 72					
PART2 2	1 GALLON SATIN PAINT Need: 0, OrdQty: 1.00, Min: 0.00, Max: 14.00, Ord%: 100%	EACH 99	10	\$ 10.000	\$ 100.00
PART2 20					

Purchase Order - Confirm PO

SUPPLIER A, 25

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1 1	HAMMER Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%	EACH 436	10	\$ 9.990	\$ 99.90
PART1 72					
PART2 2	1 GALLON SATIN PAINT Need: 0, OrdQty: 1.00, Min: 0.00, Max: 14.00, Ord%: 100%	EACH 99	10	\$ 12.990	\$ 129.90
PART2 20					

Purchase Order - Confirm PO

SUPPLIER B, 26

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1 1	HAMMER Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%	EACH 436	10	\$ 9.290	\$ 92.90
PART1 72					
PART2 2	1 GALLON SATIN PAINT Need: 0, OrdQty: 1.00, Min: 0.00, Max: 14.00, Ord%: 100%	EACH 99	10	\$ 11.990	\$ 119.90
PART2 20					

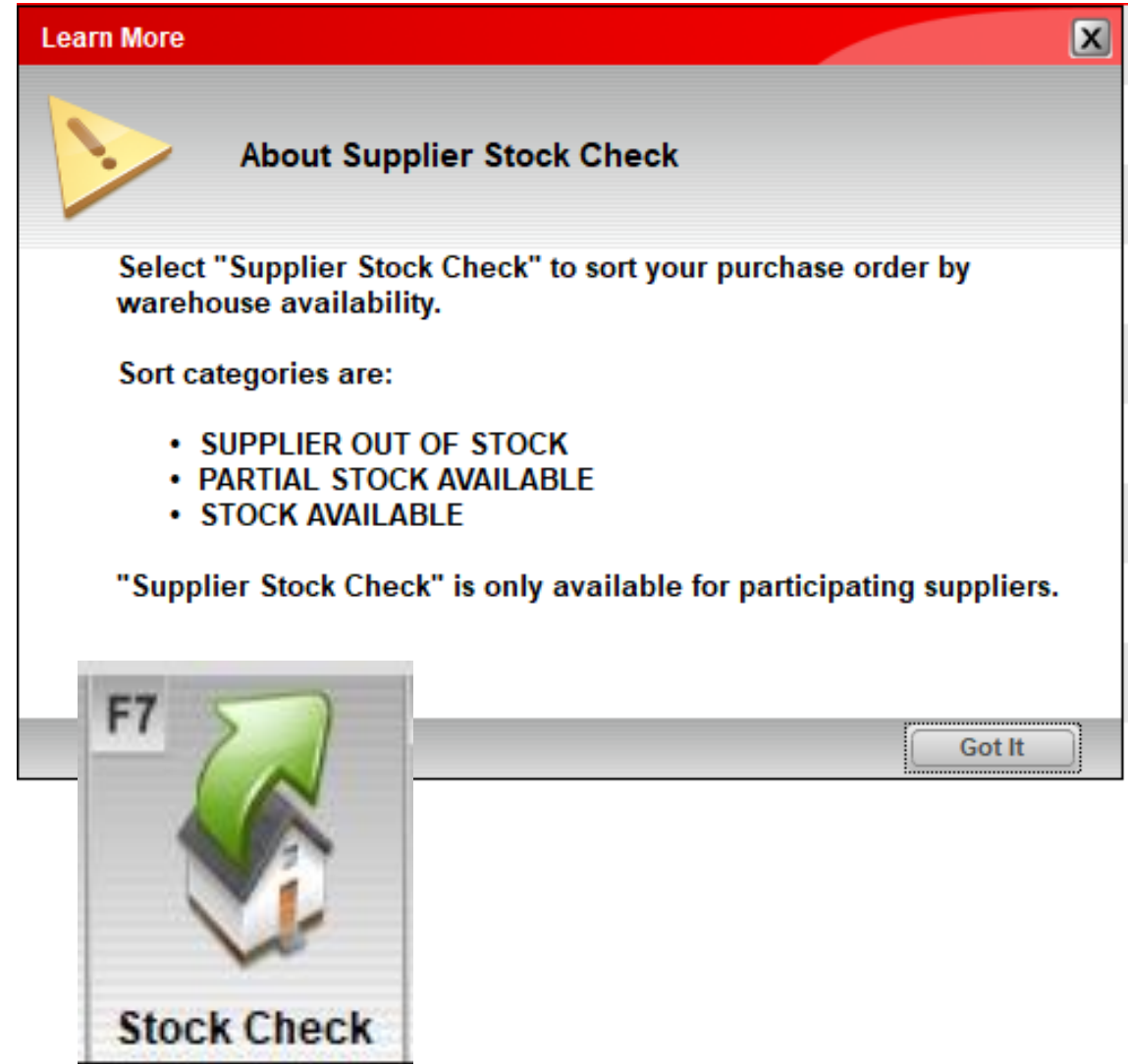
- When you select or change a supplier on a purchase order, item costs for that supplier (if set) are automatically applied to all items.

Note: Supplier costs are not refreshed when you store and recall a purchase order.

- When you “split” a Suggested Order into purchase orders for lowest cost suppliers, all supplier-specific costs set on an item will be compared.

Bonus Material

- The Remote Stock Check feature is currently available for Ace, True Value, Do It Best, & Orgill warehouses. More suppliers to be added as additional suppliers offer this functionality.
- Stock check feature (F7) can be accessed when in the Inventory, PO, & Invoice/Quote modules.
- PO's can be sorted by "Supplier Out of Stock", "Partial Stock Available" & "Stock Available", saving tons of time.



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