



Paladin Pointers: New Purchase Order Features

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Chief Experience Officer

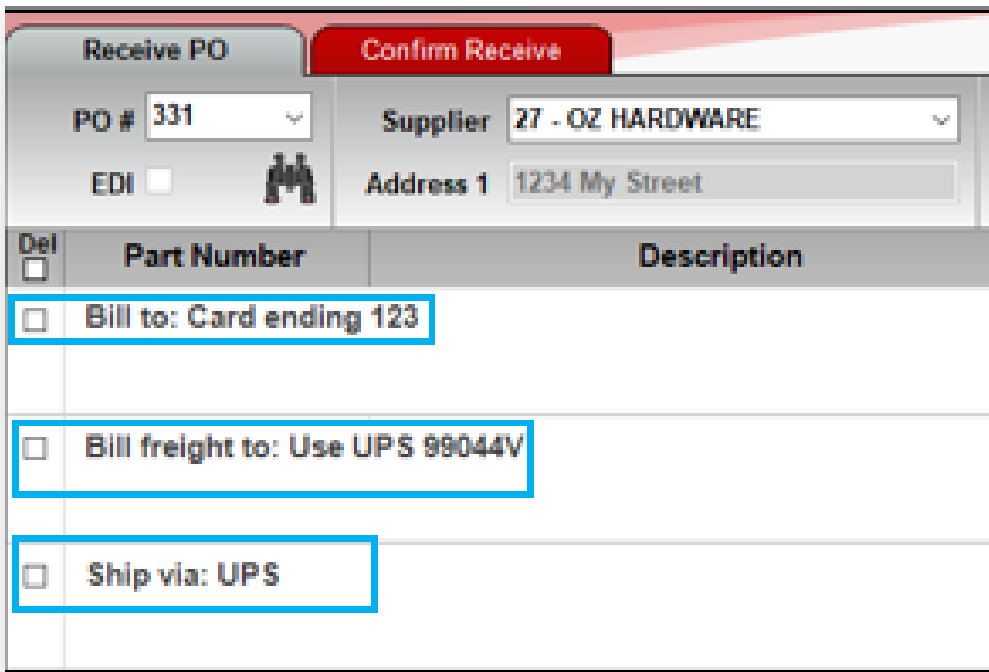
February 22, 2022

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

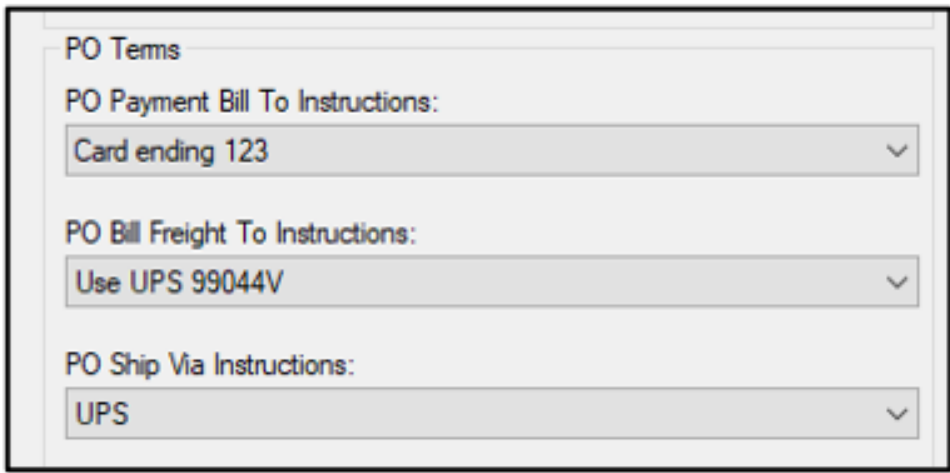
- By adding instructions to a purchase order, the supplier can view and print the instructions intended specifically for them.
- There are three simple steps for setting up instructions for a purchase order:
 1. Setup default purchase order supplier instructions
 2. Add PO instructions to the desired 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 window titled "PO Terms" with three sections, each containing a label and a drop-down menu:

- PO Payment Bill To Instructions:** Card ending 123
- PO Bill Freight To Instructions:** Use UPS 99044V
- PO Ship Via Instructions:** 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

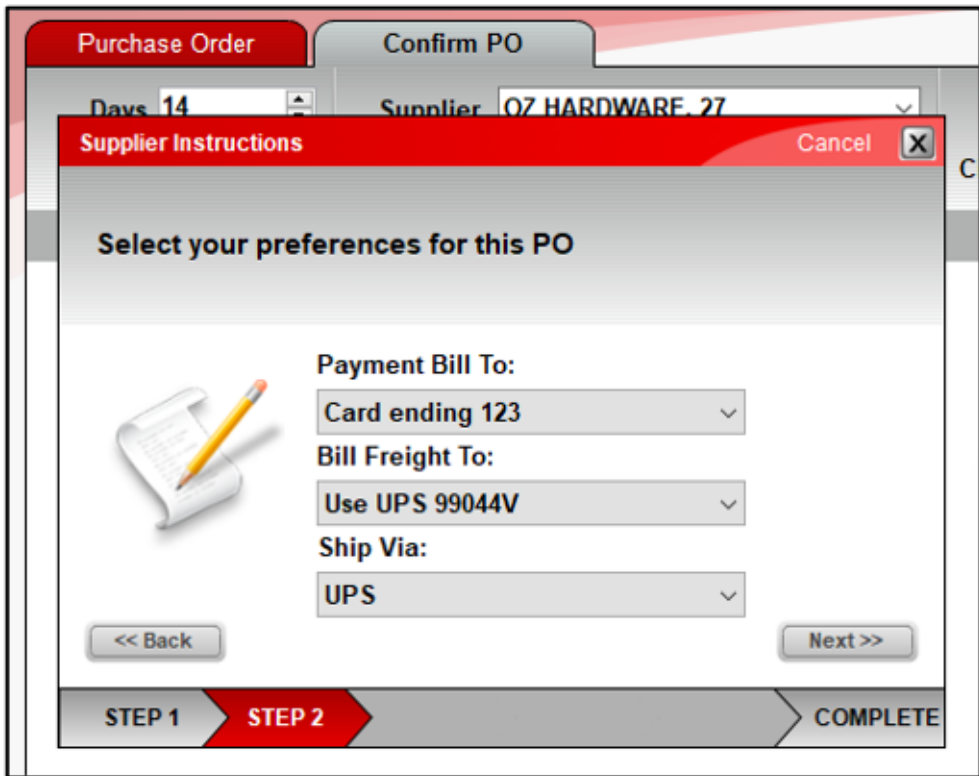


The screenshot shows the 'Purchase Order' module interface. The 'Confirm PO' tab is active. The 'Days' field is set to 14 and the 'Supplier' is 27 - OZ HARDWARE. A 'PO Number' dialog box is open, prompting the user to enter a PO number. The dialog box contains a yellow warning triangle icon and the text: 'Please enter a Purchase Order Number... Press "Next" to use the default PO number or specify your own.' Below this text is a text input field labeled 'PO Number' and a 'Next >>' button. At the bottom of the dialog box, there is a progress bar with three steps: 'STEP 1' (highlighted in red), 'STEP 2', and 'COMPLETE'.

- 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.



Purchase Order Confirm PO

Days 14 Supplier OZ HARDWARE, 27

Supplier Instructions Cancel X

Select your preferences for this PO

Payment Bill To:
Card ending 123

Bill Freight To:
Use UPS 99044V

Ship Via:
UPS

<< Back Next >>

STEP 1 STEP 2 COMPLETE



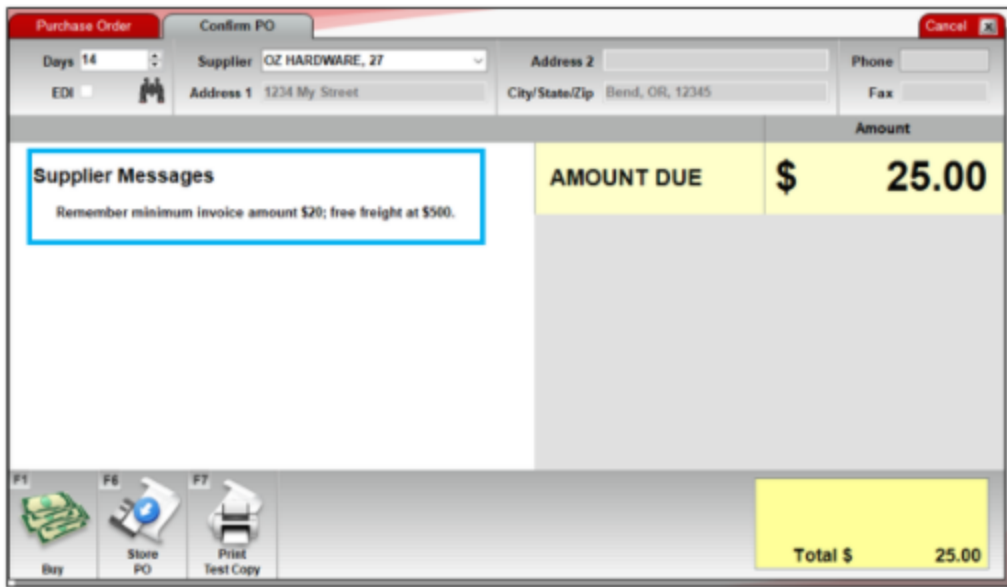
Receive PO Confirm Receive Cancel

PO # 332 Supplier 27 - OZ HARDWARE Address 2 Phone

EDI Address 1 1234 My Street City/State/Zip Bend, OR, 12345 Fax

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: 0% New Sell: \$42.00 Mar: 88%	0			

Optional PO reminder note



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

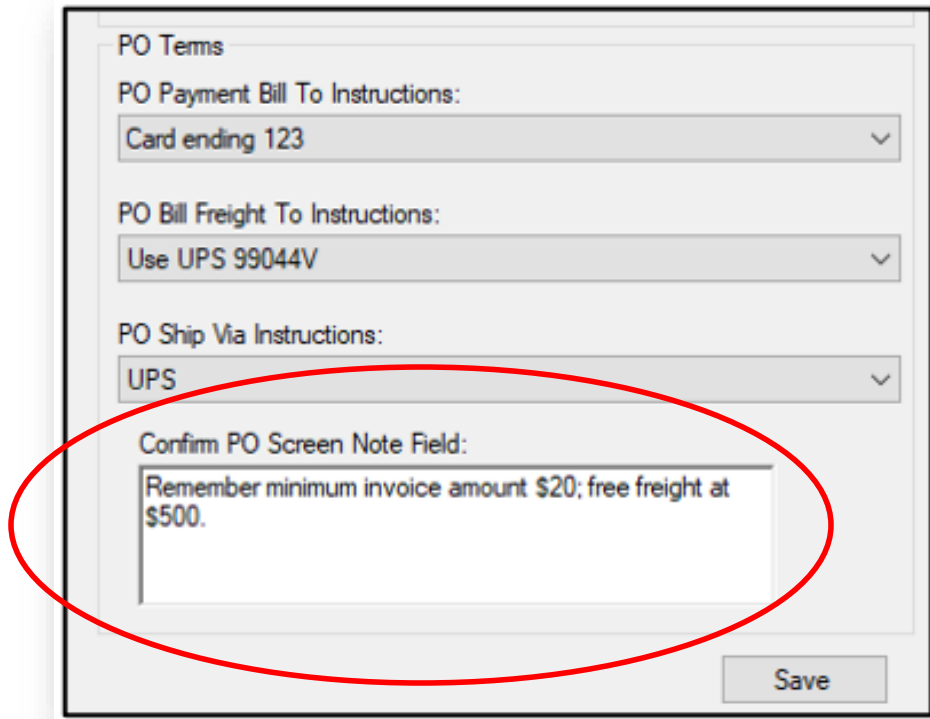
AMOUNT DUE	Amount
\$	25.00

Total \$	25.00
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- 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

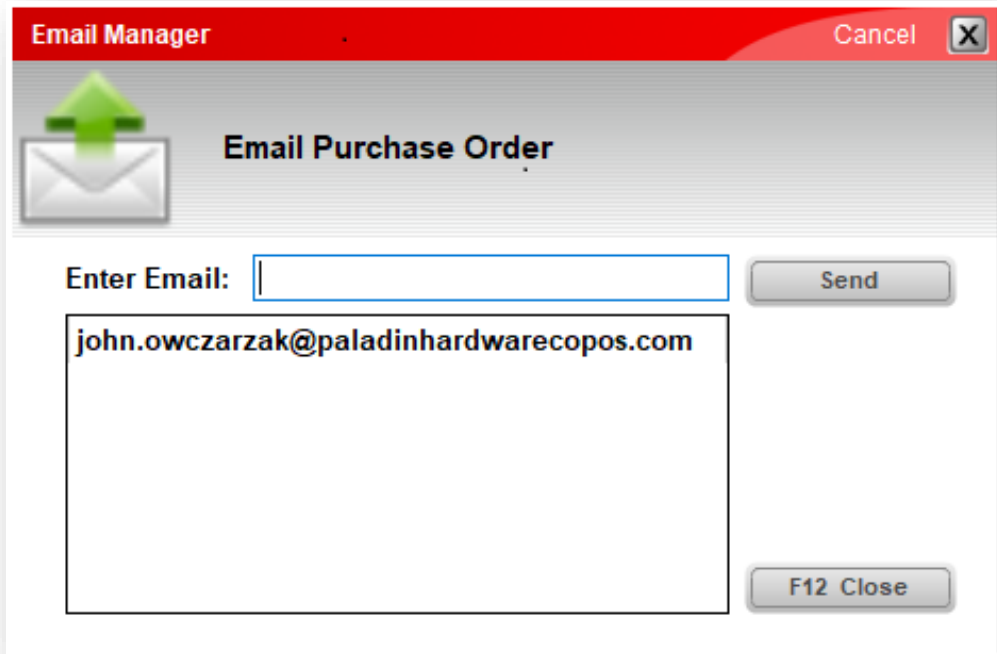
PO Ship Via Instructions:
UPS

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.

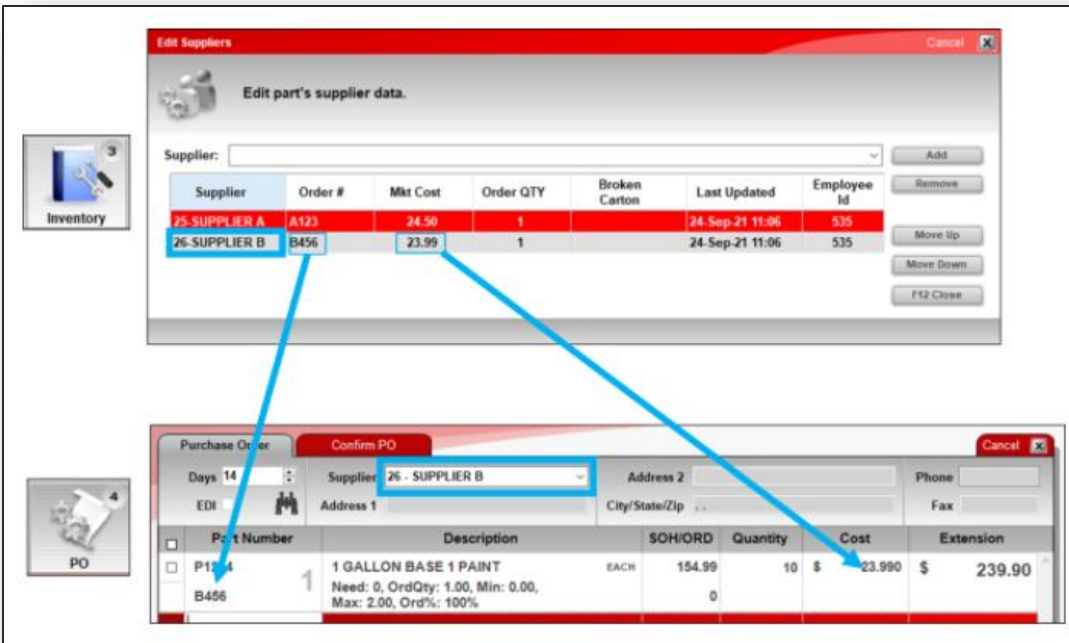
PO email record details

Receive PO		Confirm Receive	
PO #	333	Supplier	27 - OZ HARDWARE
EDI	<input type="checkbox"/>	Address 1	1234 My Street
Del	Part Number	Description	
<input type="checkbox"/>		Bill freight to: Use UPS 99044V	
<input type="checkbox"/>		Ship via: UPS	
<input type="checkbox"/>	PART1	HAMMER	
	4	Old Cost: \$5.000 Old Sell: \$42.00 Mar: 88%	
	PART1	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: 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

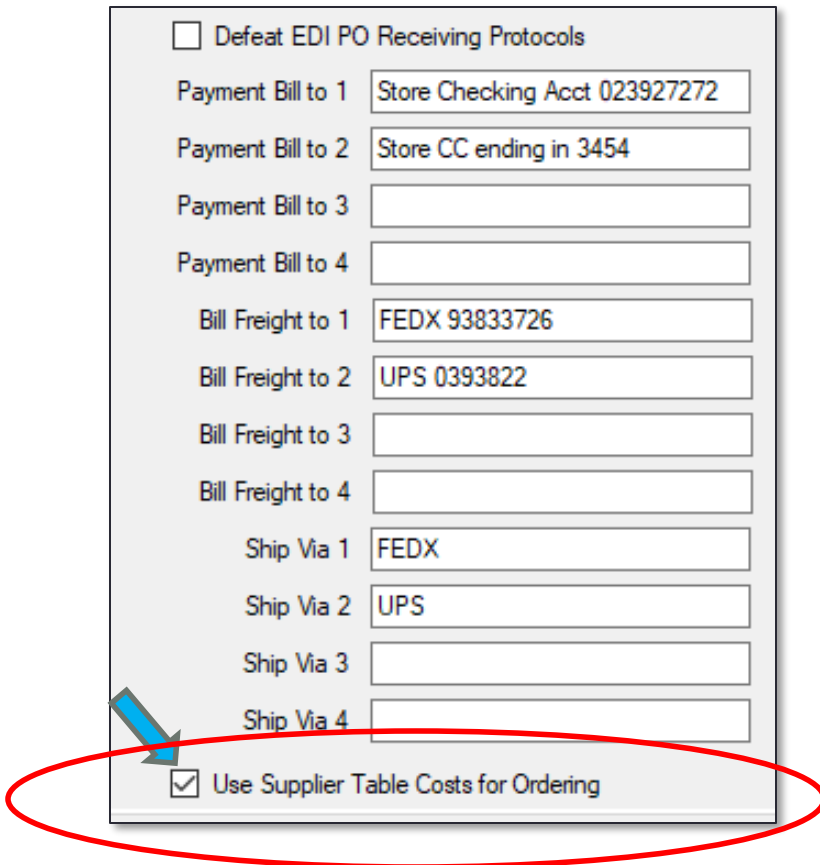
Confirm PO

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

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
P114	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.

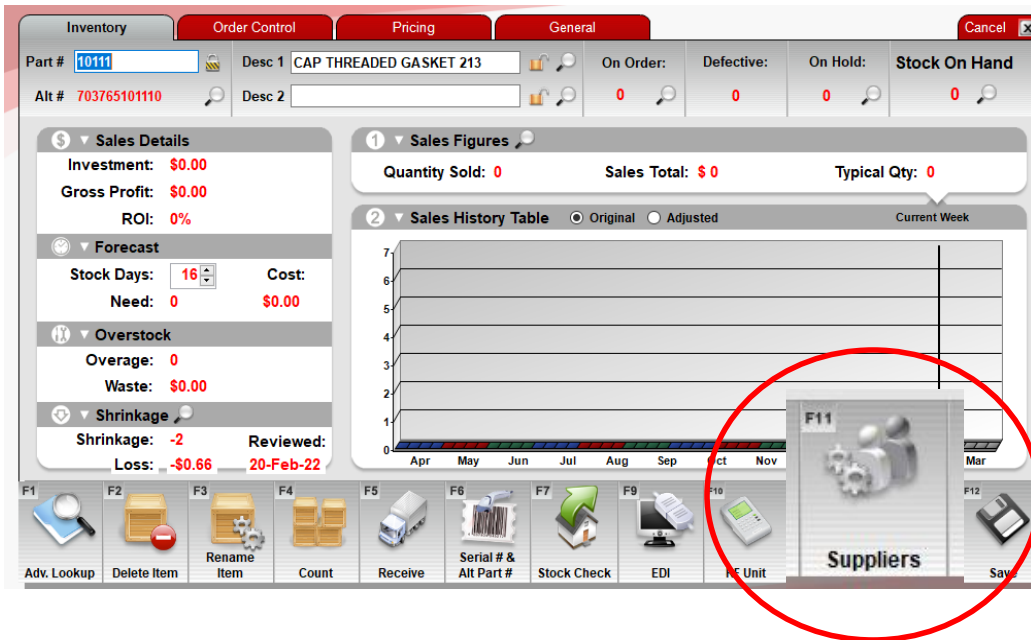
Step 2: Setting the market costs for different suppliers

- The following values can be set for individual suppliers on an inventory item:

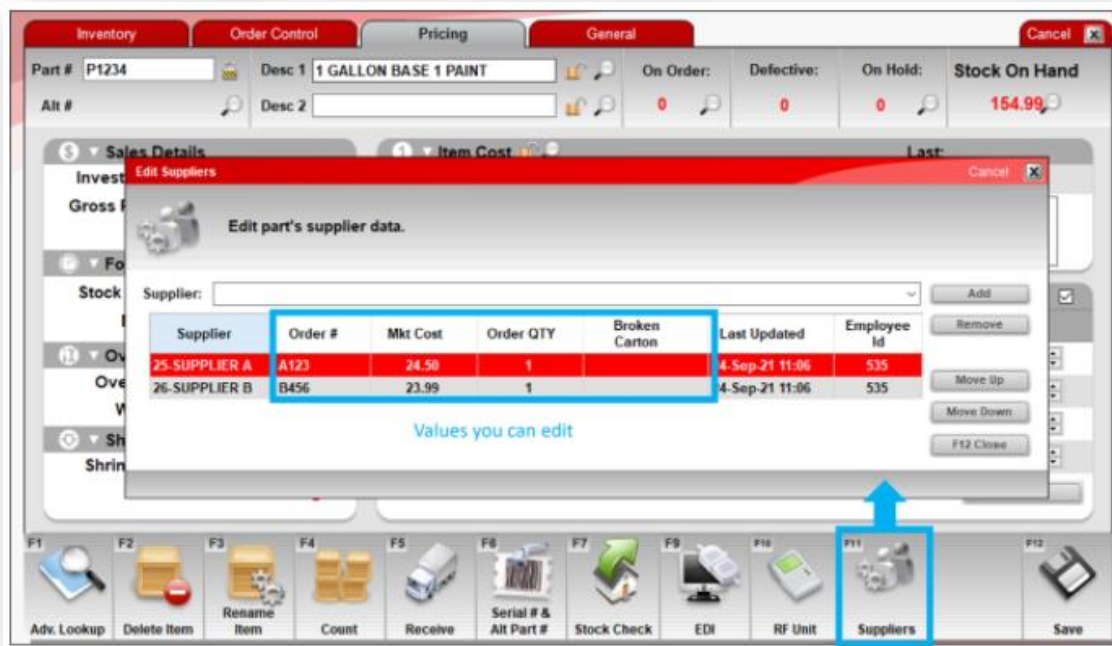
- Order #
- Mkt Cost
- Order QTY
- Broken Carton

- To set this order data, click the **Inventory module** and open the inventory item.

- Then, on the bottom, ribbon, click **Suppliers** or press F11.



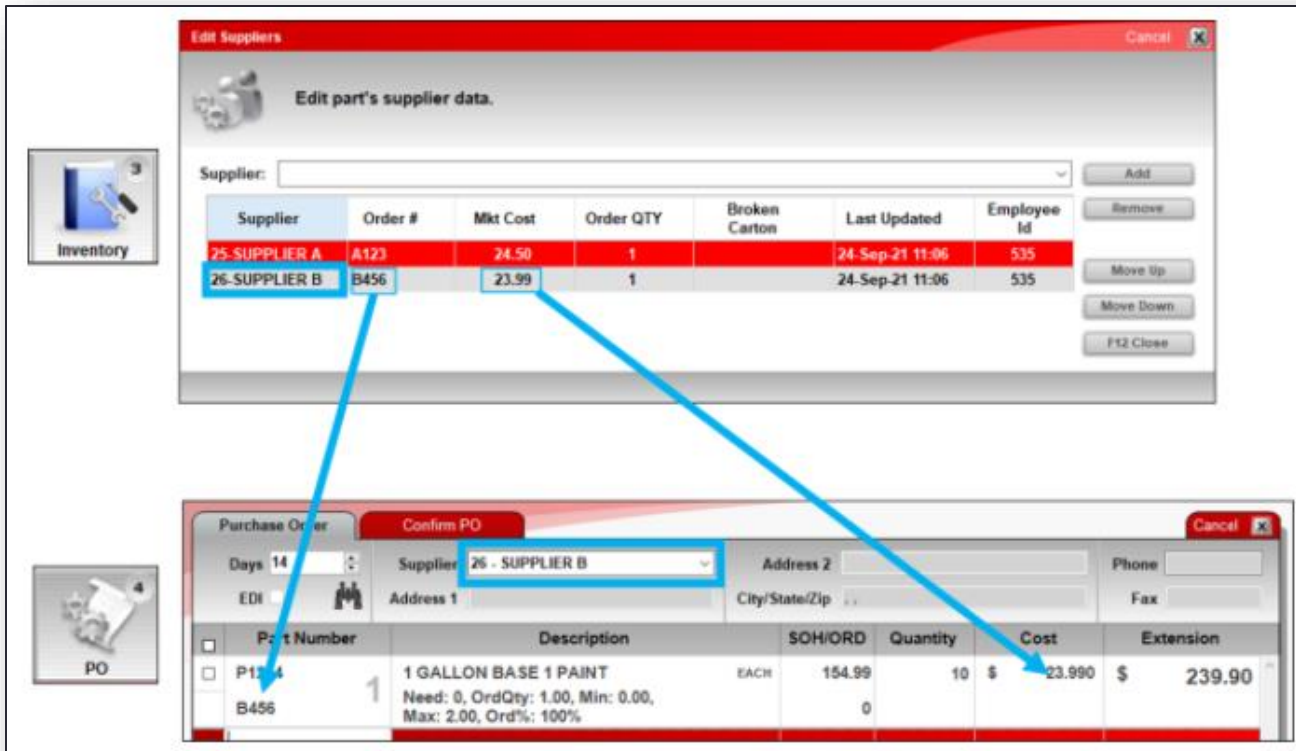
Step 2 continued: Setting the market cost and other order data for suppliers



- 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



Edit Suppliers

Supplier:

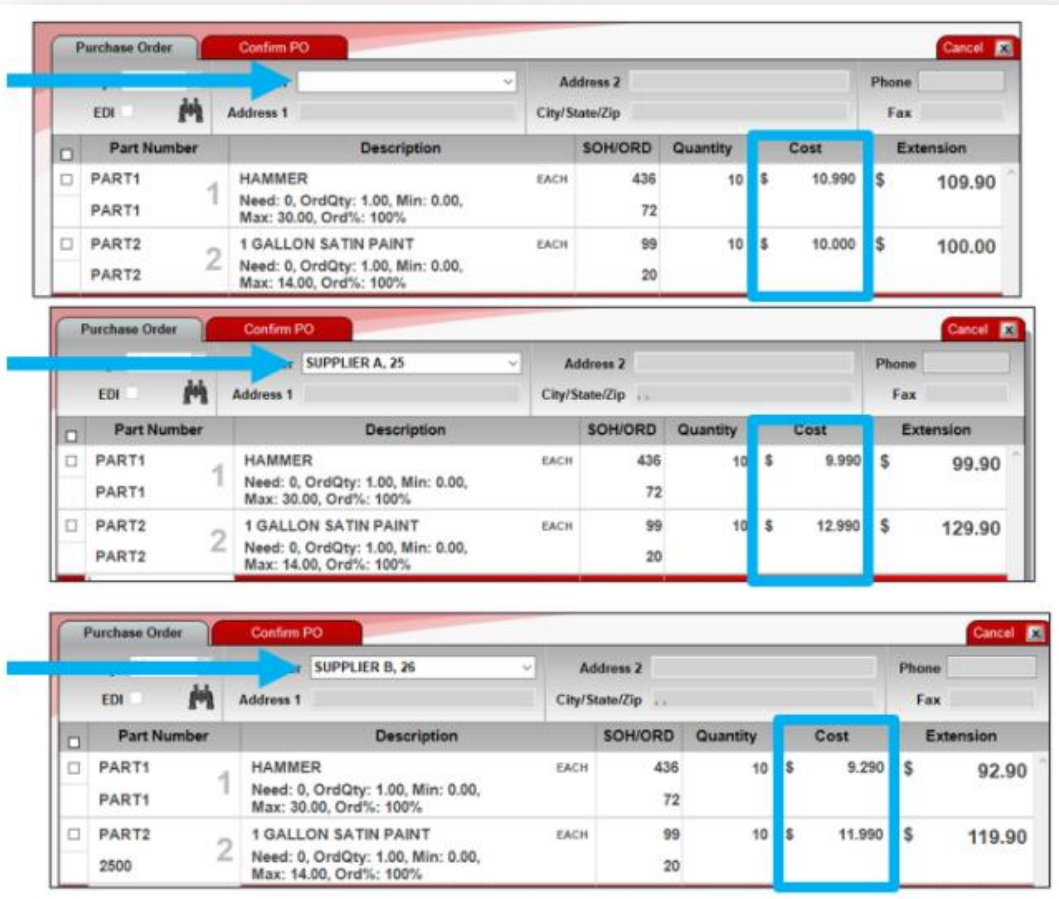
Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated	Employee Id
25-SUPPLIER A	A123	24.50	1		24-Sep-21 11:06	535
26-SUPPLIER B	B456	23.99	1		24-Sep-21 11:06	535

Purchase Order

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

Step 3 continued: Applying supplier costs during ordering



The image shows three sequential screenshots of a 'Confirm PO' dialog box. Each screenshot has a blue arrow pointing to the 'Supplier' dropdown menu. The 'Cost' column in the item list is highlighted with a blue box in each screenshot.

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

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

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1	HAMMER	EACH	436	\$ 9.290	\$ 92.90
PART1	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%		72		
PART2	1 GALLON SATIN PAINT	EACH	99	\$ 11.990	\$ 119.90
2500	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 14.00, Ord%: 100%		20		

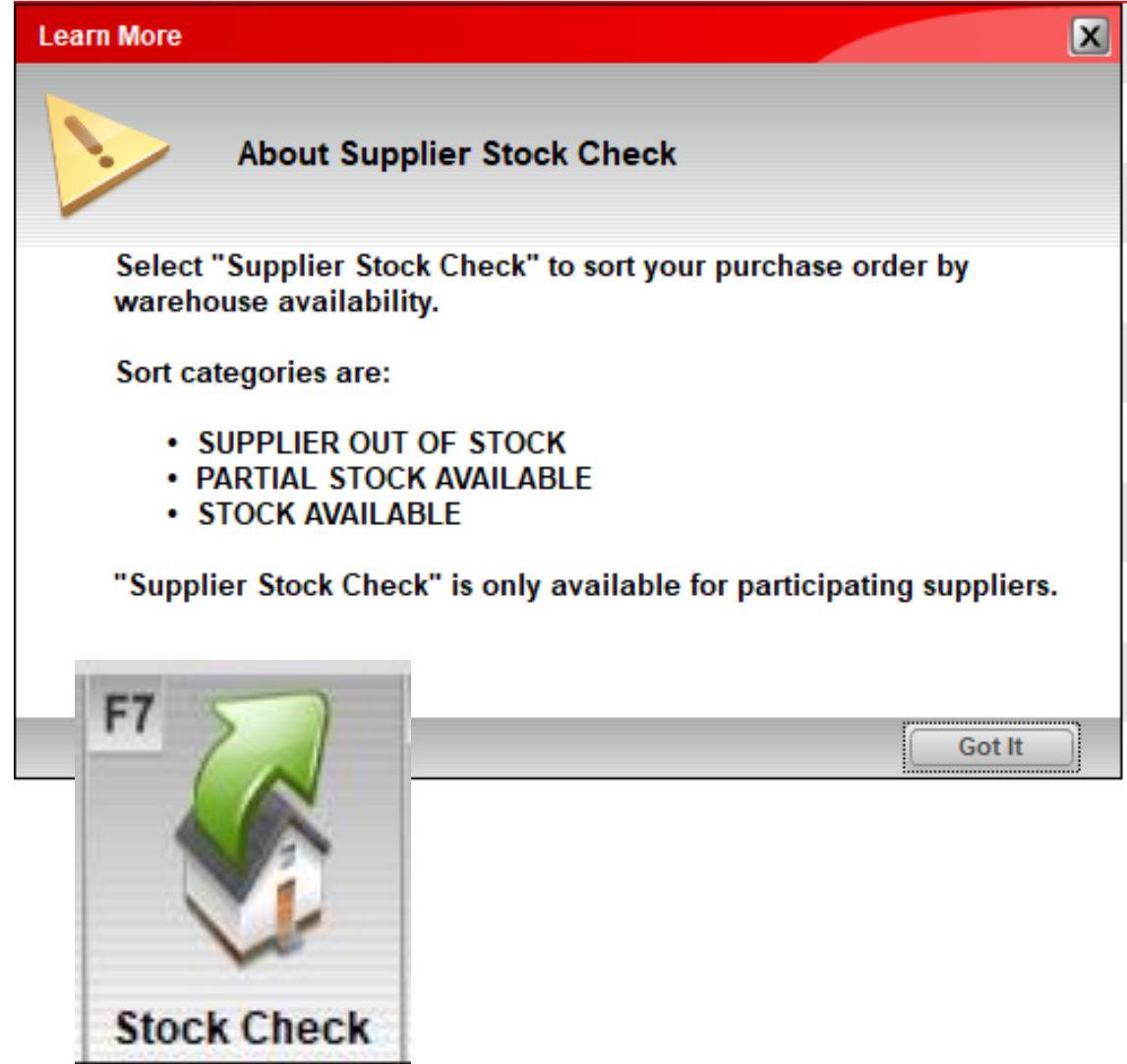
- When you select or change a supplier on a purchase order, item costs for that supplier (if set) are automatically applied to all items.

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.



Learn More ✕

 **About Supplier Stock Check**


Select "Supplier Stock Check" to sort your purchase order by warehouse availability.

Sort categories are:

- SUPPLIER OUT OF STOCK
- PARTIAL STOCK AVAILABLE
- STOCK AVAILABLE

"Supplier Stock Check" is only available for participating suppliers.

Got It

F7  **Stock Check**

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**Paladin Pointers:
Optimizing our Invoice Tab**

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