



Purchase Orders Potpourri: Everything You Need to Know About the Paladin Purchase Order Module and Features – Part 1

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January 30, 2024

WHAT YOU'LL LEARN

- Advantages of using PO's in Paladin.
- The various methods of creating PO's.
- Creating, confirming, & sending PO's.
- Recalling and sending a stored PO.
- Receiving a manual PO.
- Receiving an EDI PO.
- Resending an open PO to suppliers.
- Merge stored PO's.

Advantages of using PO's in Paladin



- Logical, **practical**, easy and best method for receiving and managing inventory.
- Most **effective** method for tracking purchases and managing stock on hand (SOH).
- 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.

The various methods of creating PO's

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 Supplier).

PURCHASE ORDER

Hanyman Hardware
123 Main Street
Paris, IN 46580
456-123-1234

PO #	376
ACCOUNT #	643
SUPPLIER #	643
DATE	22-Jan-24
TIME	05:38
EMPLOYEE	1 - Paladin S.
TERMINAL	12
PAGE #	1

ORDERED FROM: OWENS

SHIP TO:
P: 456-123-1234
Hanyman Hardware
1403 N Detroit St
Warsaw, IN 46580

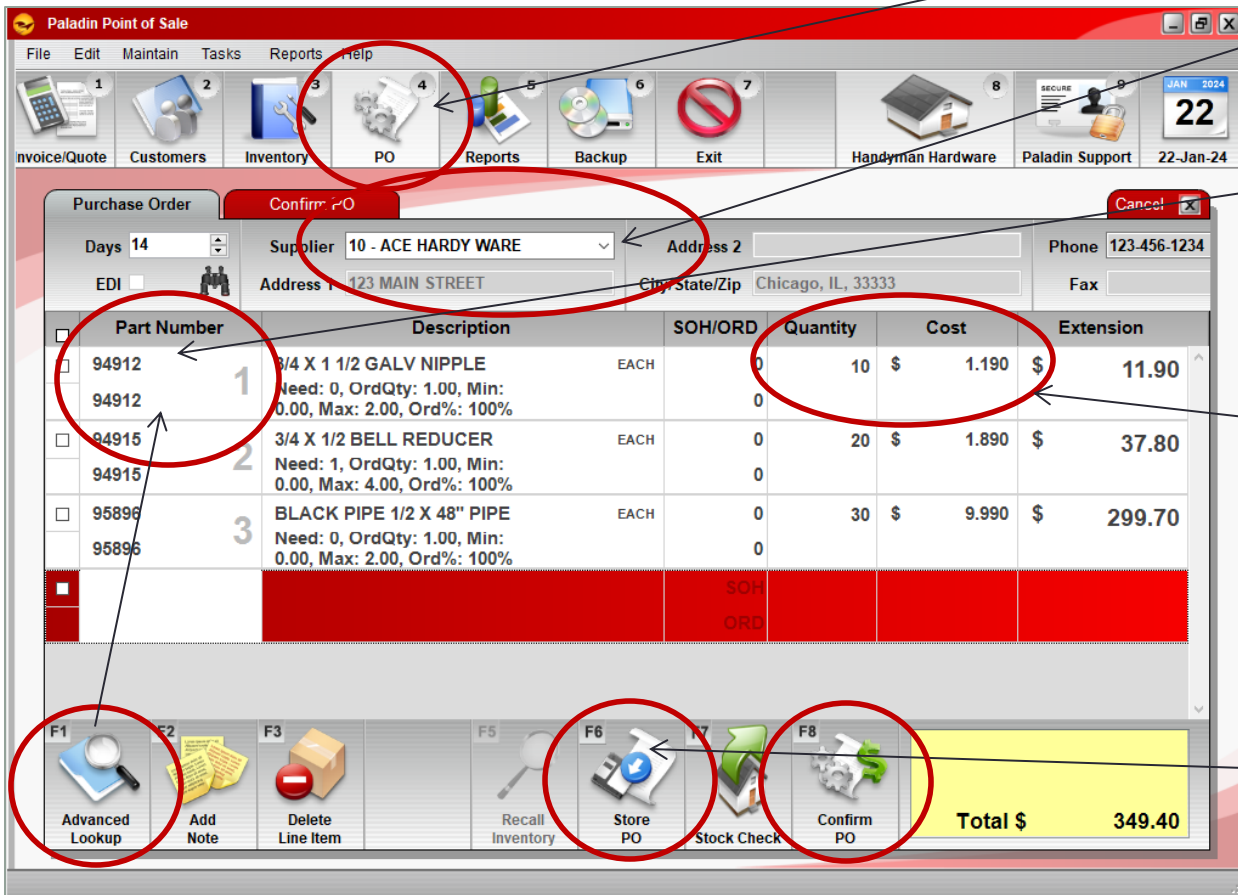
ITEM	DESCRIPTION	QTY	COST	U/M	EXT
11-119	MASONRY GUIDE SLIDE	2	17.800	EACH	35.60
0032-08-05	SCAFFOLD RIGID LEVELING JACK	2	31.500	EACH	63.00
11-476	JOINTER V BAR 12	2	4.980	EACH	9.96
11-258	CAULK TROWEL 1" 11-258	5	11.060	EACH	55.30
1184	HW 12" LINE BLOCK	20	1.750	EACH	35.00
005-LG	TAPERED WOOD SHIMS	30	1.850	EACH	55.50

I AGREE TO PAY THE ABOVE TOTAL ACCORDING TO THE POSTED TERMS AND CONDITIONS

SIGNATURE _____

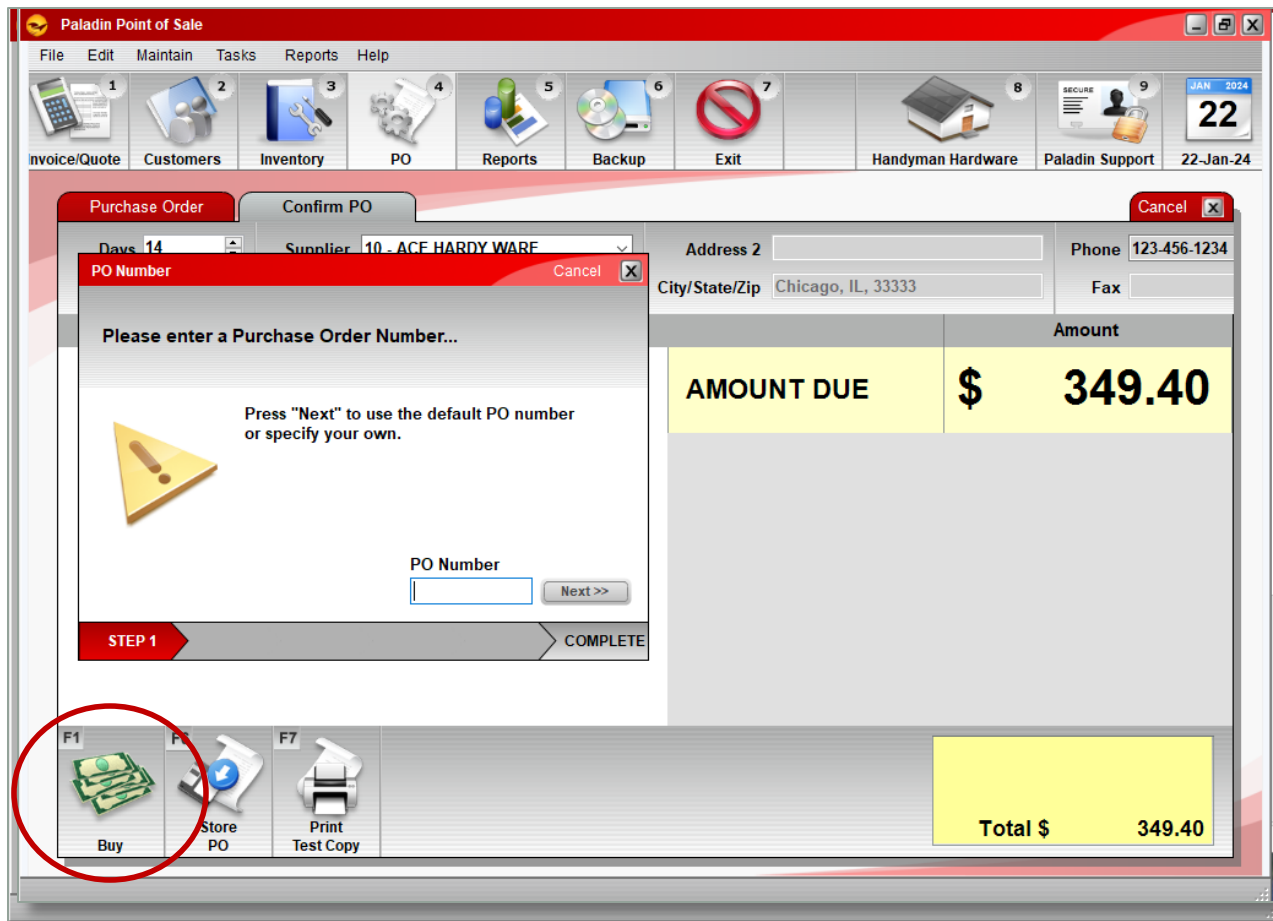
TOTAL \$ 254.36

Creating a manual PO



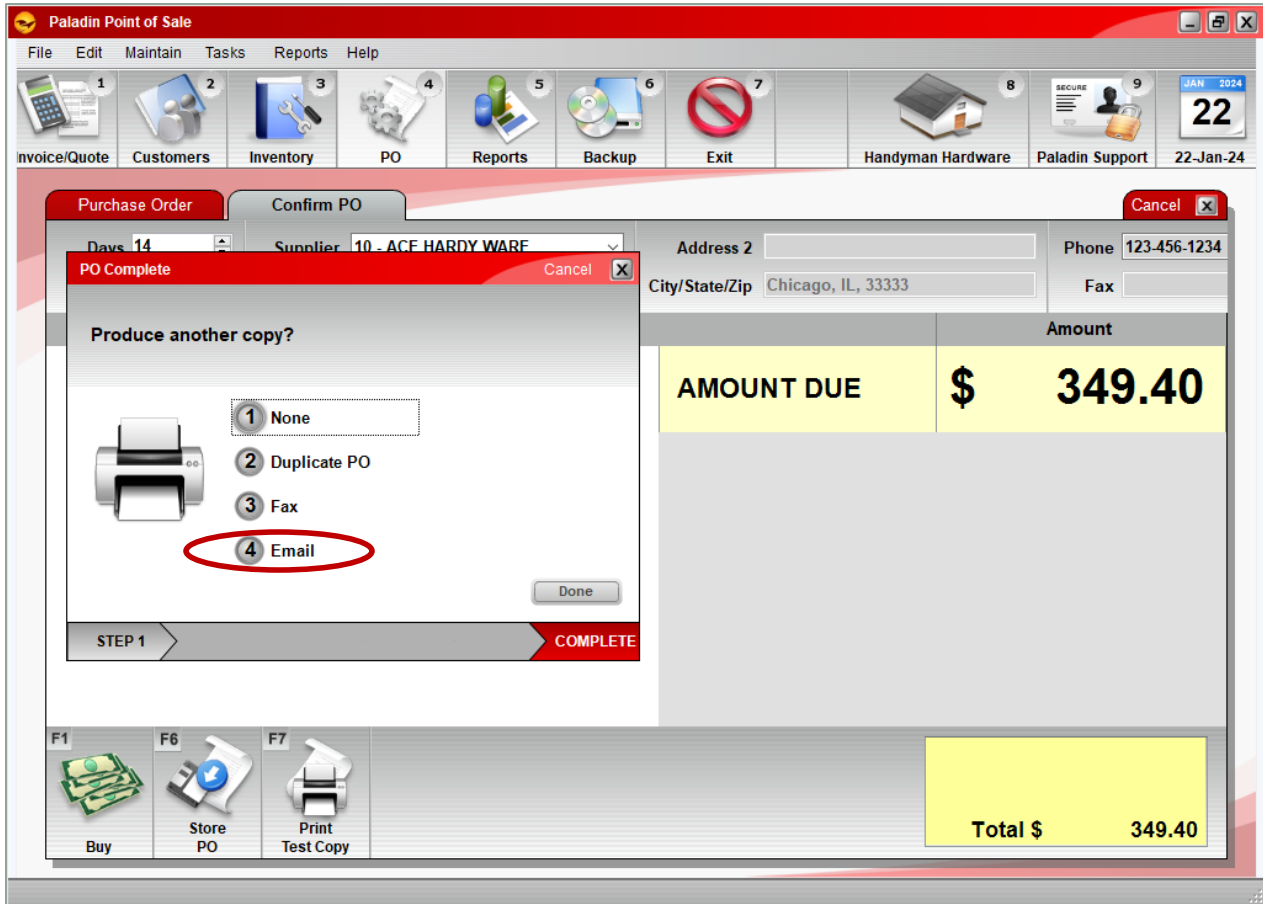
1. Select the **PO** module.
2. Enter or select a supplier from the **Supplier** list.
3. In the **Part Number** box, enter a part number or to search for a part, click **F1 Advanced Lookup**.
4. Select a single or multiple items and adjust the **Quantity** or **Cost** as desired, press **Enter**.
5.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

Confirming a manual PO



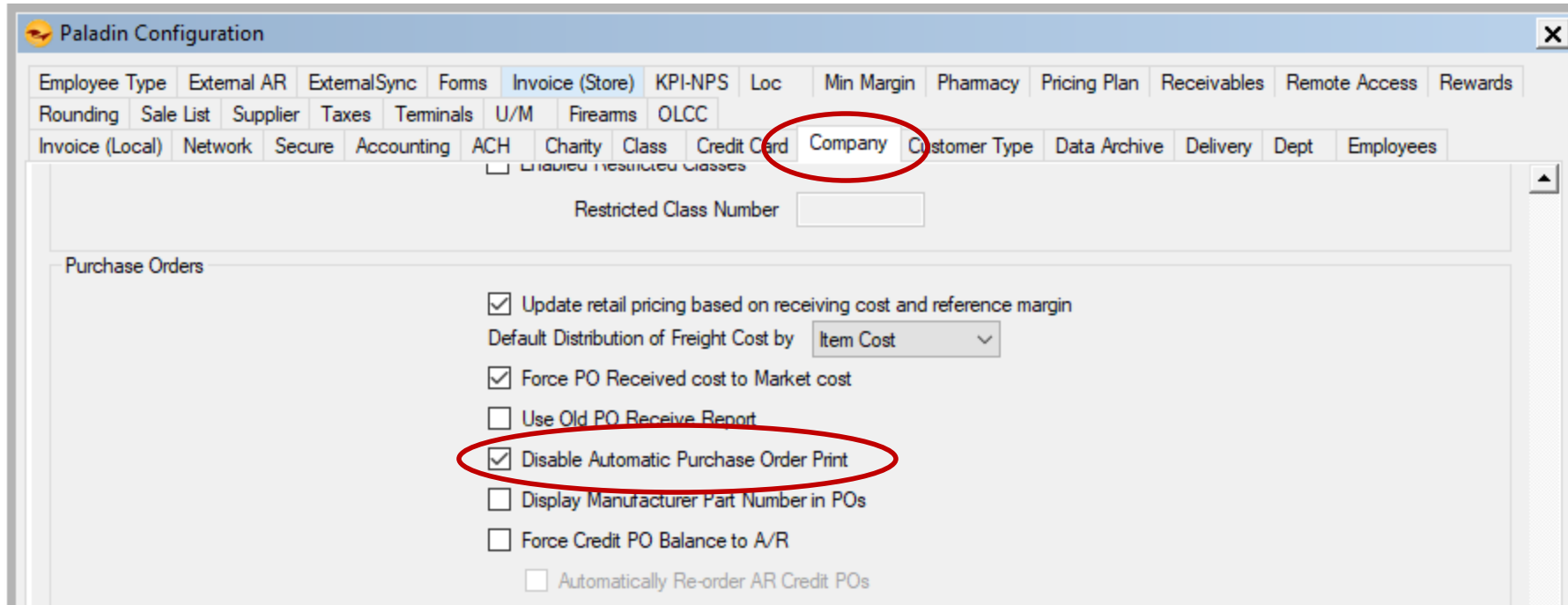
7. After pressing **F8 Confirm PO**, click **F1 Buy**.
8. In the **PO Number** window, enter a P.O. number, or click Next and a sequential P.O. number will be generated and assigned automatically.
9. Your order has been completed.

Sending a manual PO



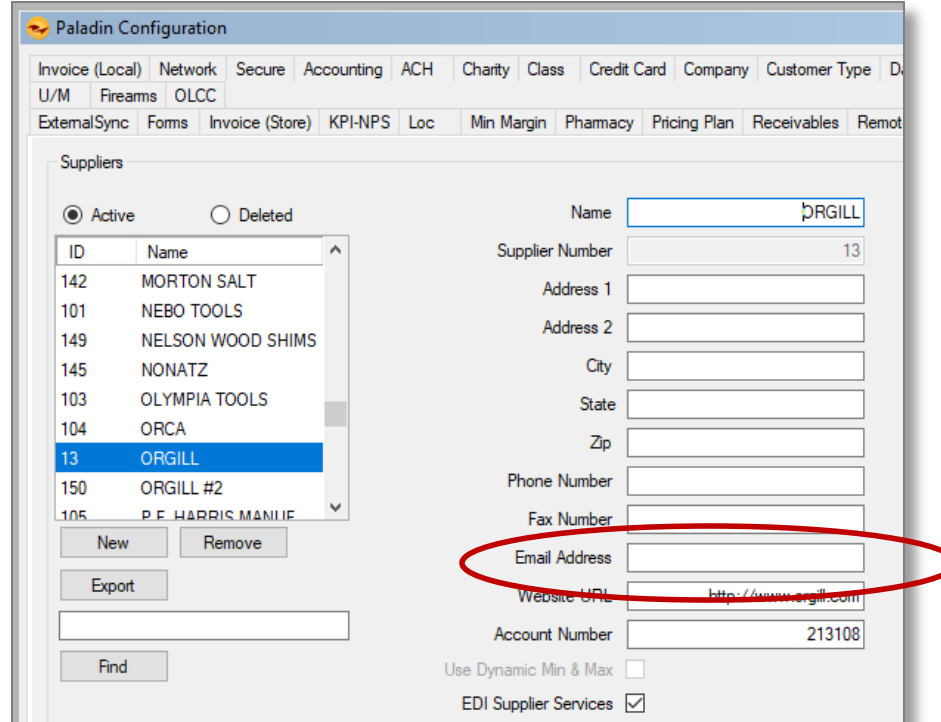
10. In the **PO Complete** window, select from the four options of producing a copy of the PO.
 1. None
 2. Duplicate PO
 3. Fax
 4. **Email (on demand)**
11. Click **Done**.
12. Your purchase order has been created, confirmed and printed and/or sent. These products are now on-order and displayed in the inventory as **On Order**.

To turn off automatic printing of PO's



- Go to **File->Setup->Company** tab.
- Under Purchase Orders select: **Disable Automatic Purchase Order Print**.

Setting up PO's to be sent to an email address



Paladin Configuration

Invoice (Local) Network Secure Accounting ACH Charity Class Credit Card Company Customer Type D
U/M Firearms OLCC
ExternalSync Foms Invoice (Store) KPI-NPS Loc Min Margin Pharmacy Pricing Plan Receivables Remot

Suppliers

Active Deleted

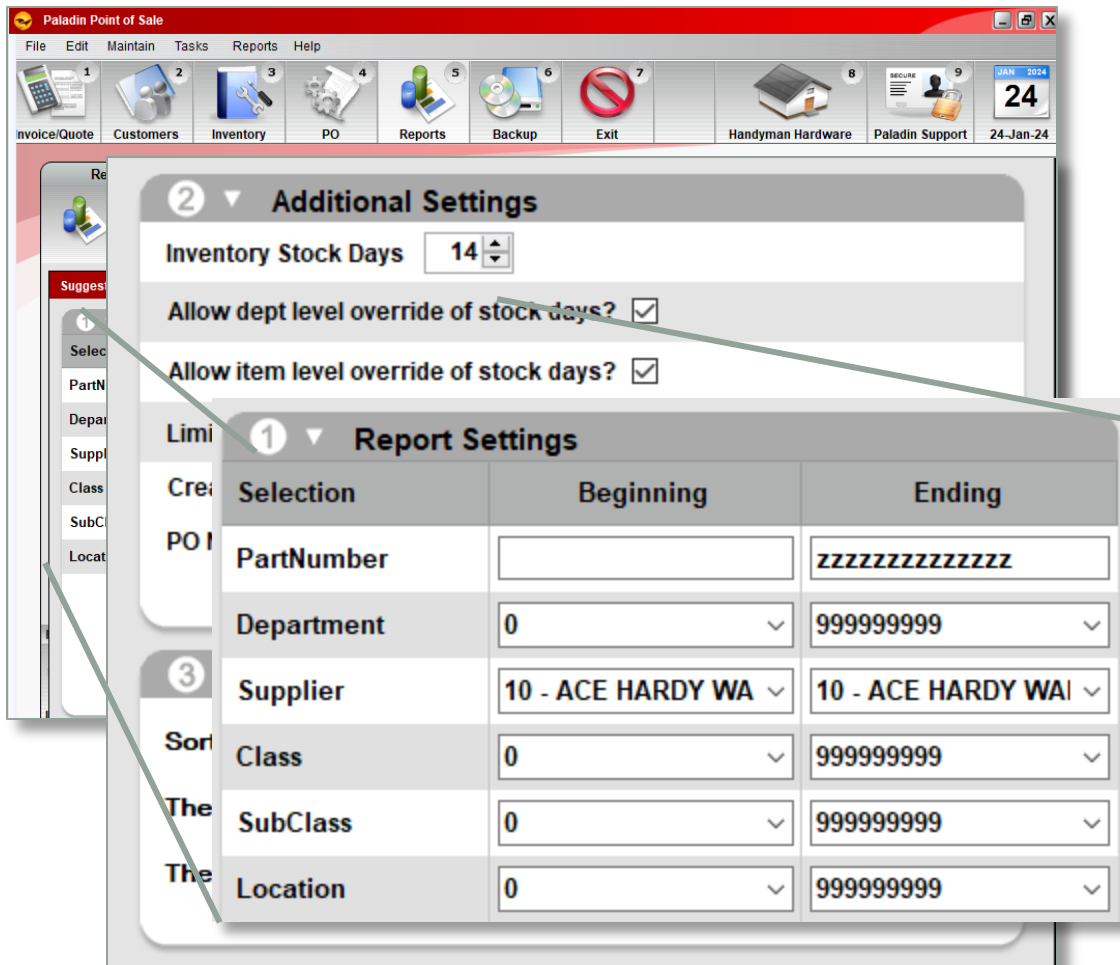
ID	Name
142	MORTON SALT
101	NEBO TOOLS
149	NELSON WOOD SHIMS
145	NONATZ
103	OLYMPIA TOOLS
104	ORCA
13	ORGILL
150	ORGILL #2
105	P. F. HARRIS MANLIE

New Remove
Export
Find

Name
Supplier Number
Address 1
Address 2
City
State
Zip
Phone Number
Fax Number
Email Address
Website URL
Account Number
Use Dynamic Min & Max
EDI Supplier Services

- Go to **File->Setup->Supplier** tab.
- Enter Email Address

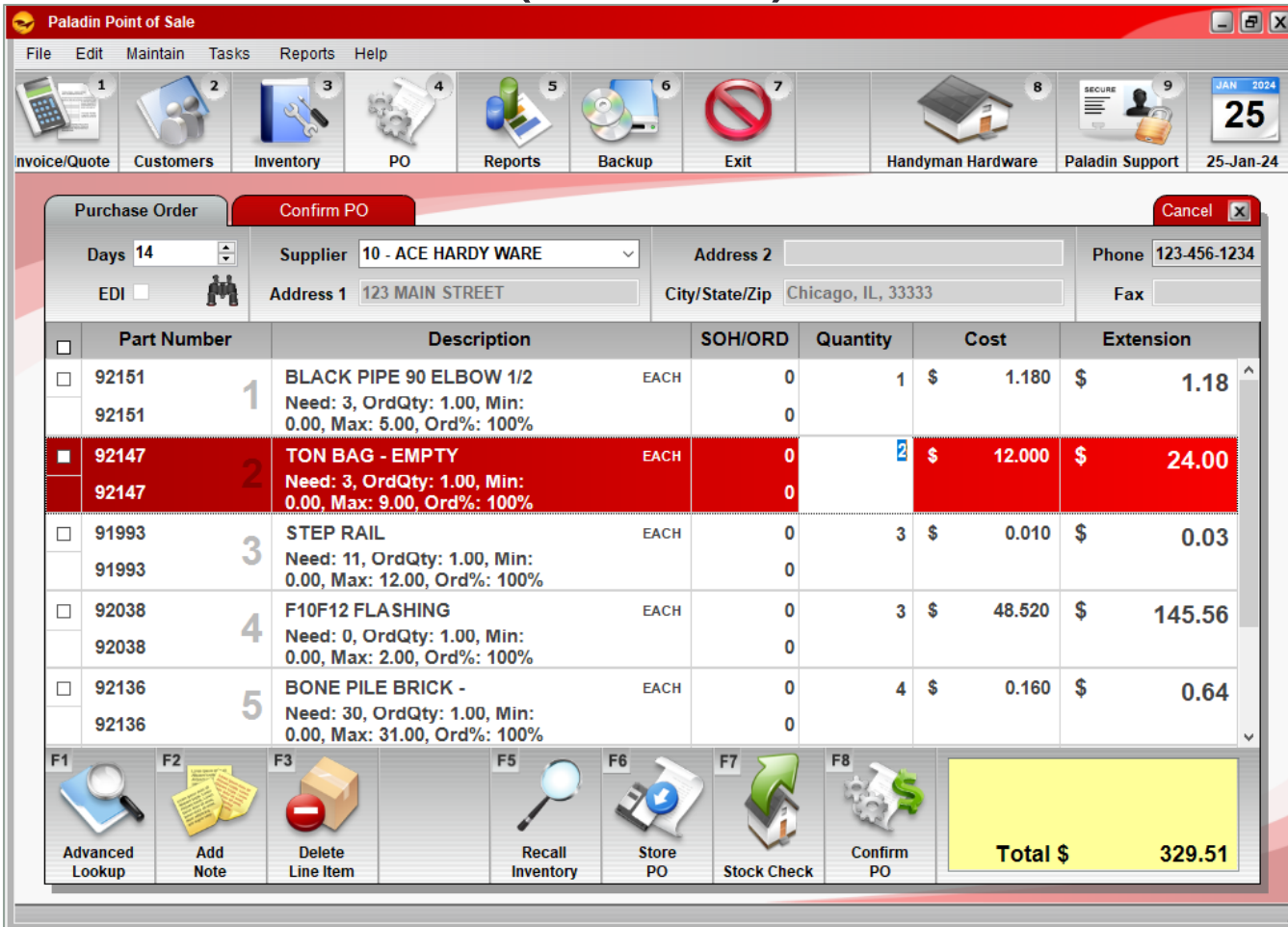
Creating an automated PO



How to create a PO using the Suggested Order Report.

1. In Paladin, top ribbon, 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.
7. Select a sort order of choice in the **Sorting Options** pane. I recommend **Extended Cost** in Descending order to push high-dollar items to the top.

Creating an automated PO (cont'd)



Purchase Order **Confirm PO** Cancel

Days: 14 | Supplier: 10 - ACE HARDY WARE | Address 2: | Phone: 123-456-1234
 EDI: | Address 1: 123 MAIN STREET | City/State/Zip: Chicago, IL, 33333 | Fax: |

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
92151	BLACK PIPE 90 ELBOW 1/2 Need: 3, OrdQty: 1.00, Min: 0.00, Max: 5.00, Ord%: 100%	0	1	\$ 1.180	\$ 1.18
92147	TON BAG - EMPTY Need: 3, OrdQty: 1.00, Min: 0.00, Max: 9.00, Ord%: 100%	0	2	\$ 12.000	\$ 24.00
91993	STEP RAIL Need: 11, OrdQty: 1.00, Min: 0.00, Max: 12.00, Ord%: 100%	0	3	\$ 0.010	\$ 0.03
92038	F10F12 FLASHING Need: 0, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	0	3	\$ 48.520	\$ 145.56
92136	BONE PILE BRICK - Need: 30, OrdQty: 1.00, Min: 0.00, Max: 31.00, Ord%: 100%	0	4	\$ 0.160	\$ 0.64
Total \$					329.51

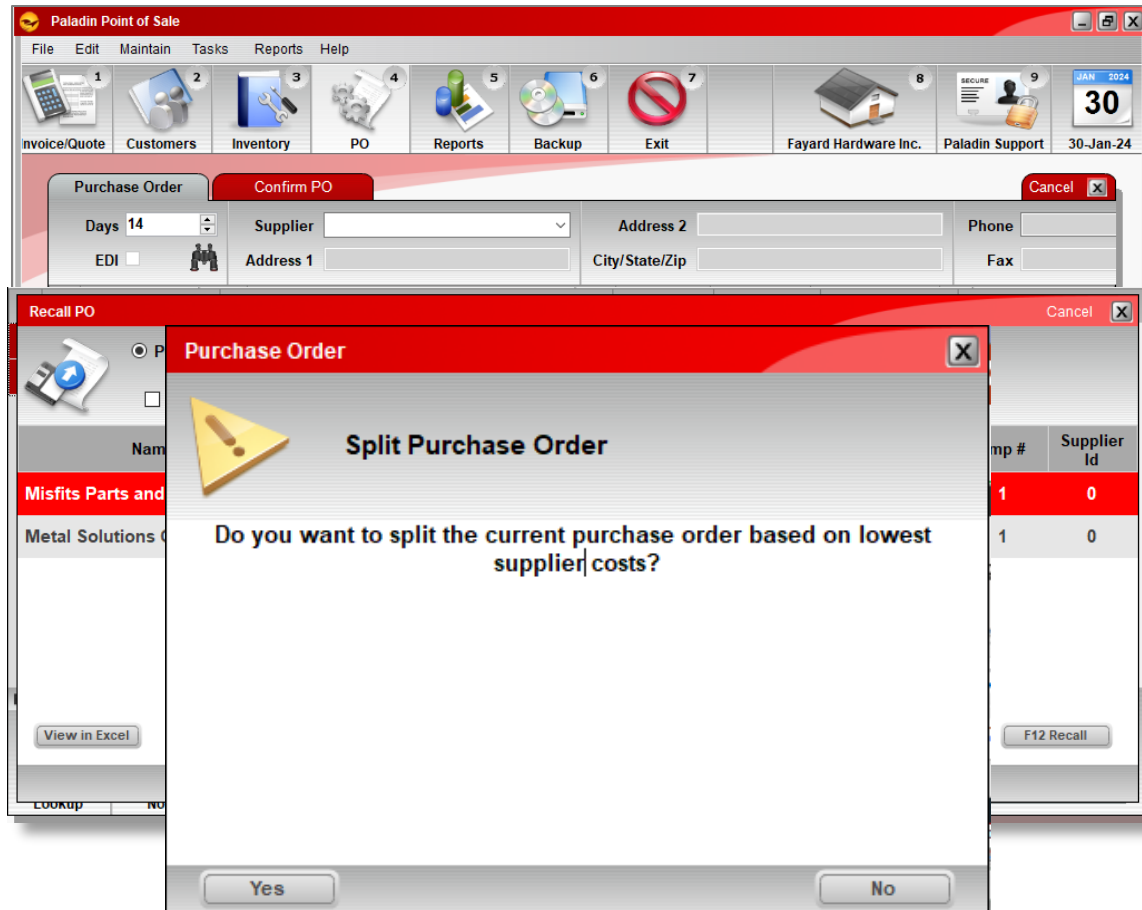
F1 Advanced Lookup | F2 Add Note | F3 Delete Line Item | F5 Recall Inventory | F6 Store PO | F7 Stock Check | F8 Confirm PO

How to create a PO using the **Suggested Order Report**.

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 P.O.

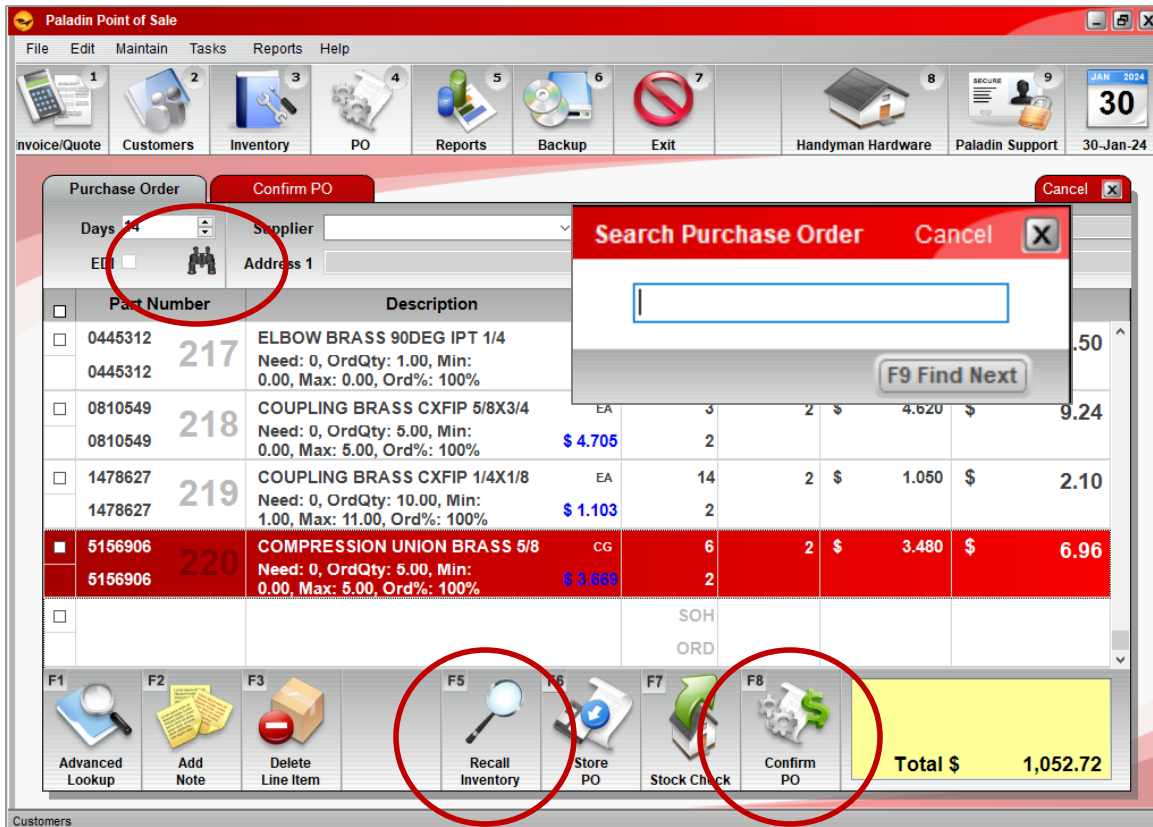
Note: Most EDI suppliers PO's will be sorted based on availability of product in the warehouse.

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 (cont.'d)



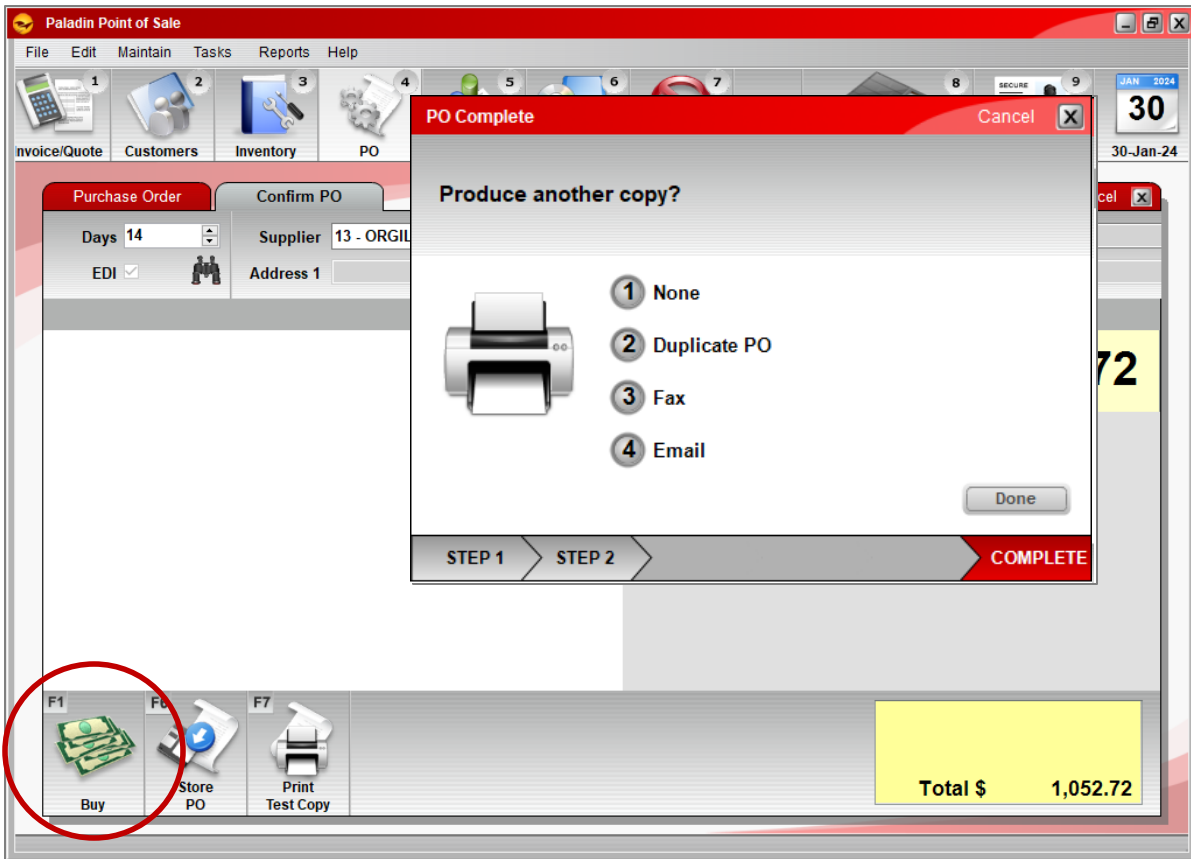
The screenshot shows the 'Paladin Point of Sale' software interface. A 'Purchase Order' window is open, displaying a table of items. A search dialog box is overlaid on the table, and a 'Confirm PO' button is highlighted in the bottom toolbar. Red circles highlight the binoculars icon in the top toolbar, the search dialog, the 'Recall Inventory' button (F5), and the 'Confirm PO' button (F8).

Part Number	Description	EA	SOH	ORD	Unit Price	Total Price
0445312 217	ELBOW BRASS 90DEG IPT 1/4				0.50	
0810549 218	COUPLING BRASS CXFIP 5/8X3/4	EA	3	2	\$ 4.620	\$ 9.24
1478627 219	COUPLING BRASS CXFIP 1/4X1/8	EA	14	2	\$ 1.050	\$ 2.10
5156906 220	COMPRESSION UNION BRASS 5/8	CG	6	2	\$ 3.480	\$ 6.96

Total \$ 1,052.72

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

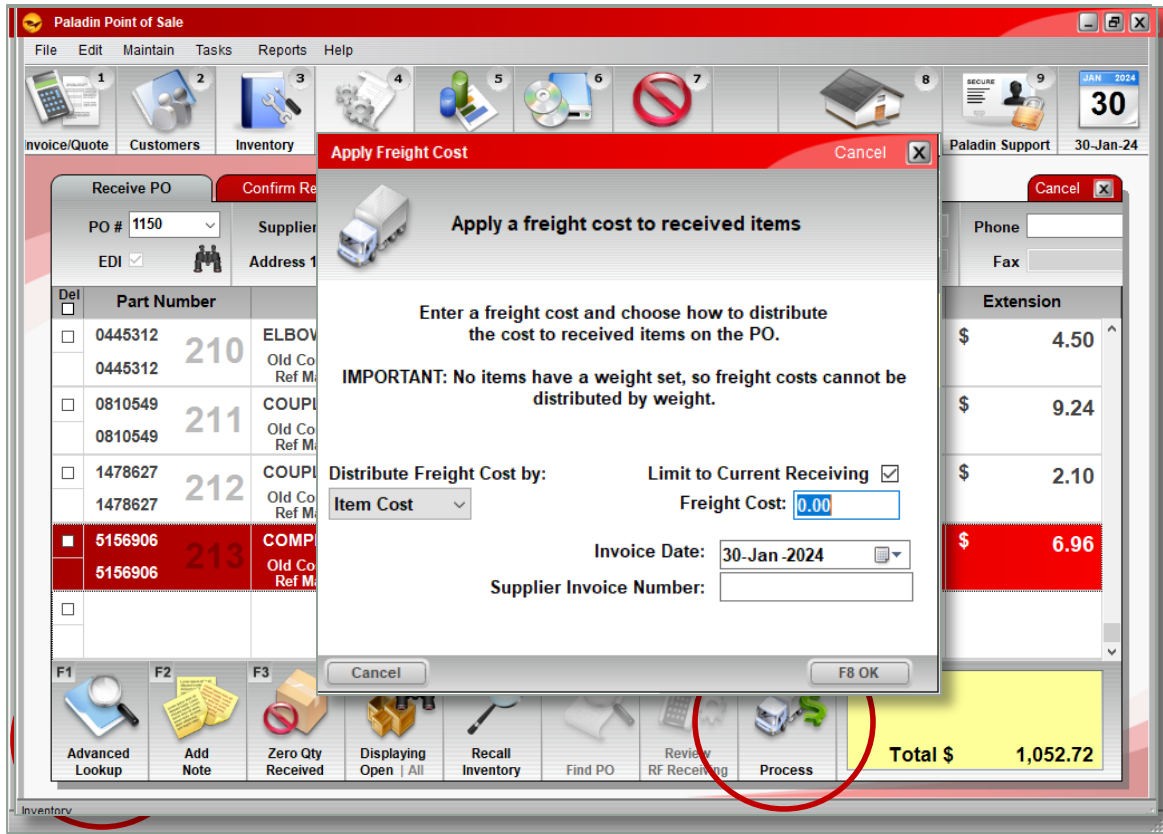
Recalling and sending a stored PO (cont.'d)



11. Click **F1 Buy**.
 12. Optionally you may enter a numeric PO number or let the system assign one.
 13. If this is an order for your EDI supplier, you will receive a confirmation that the order has been sent.
 14. If not an EDI order, select the desired method for sending the order, i.e. Print, Fax, Email.
- Done.

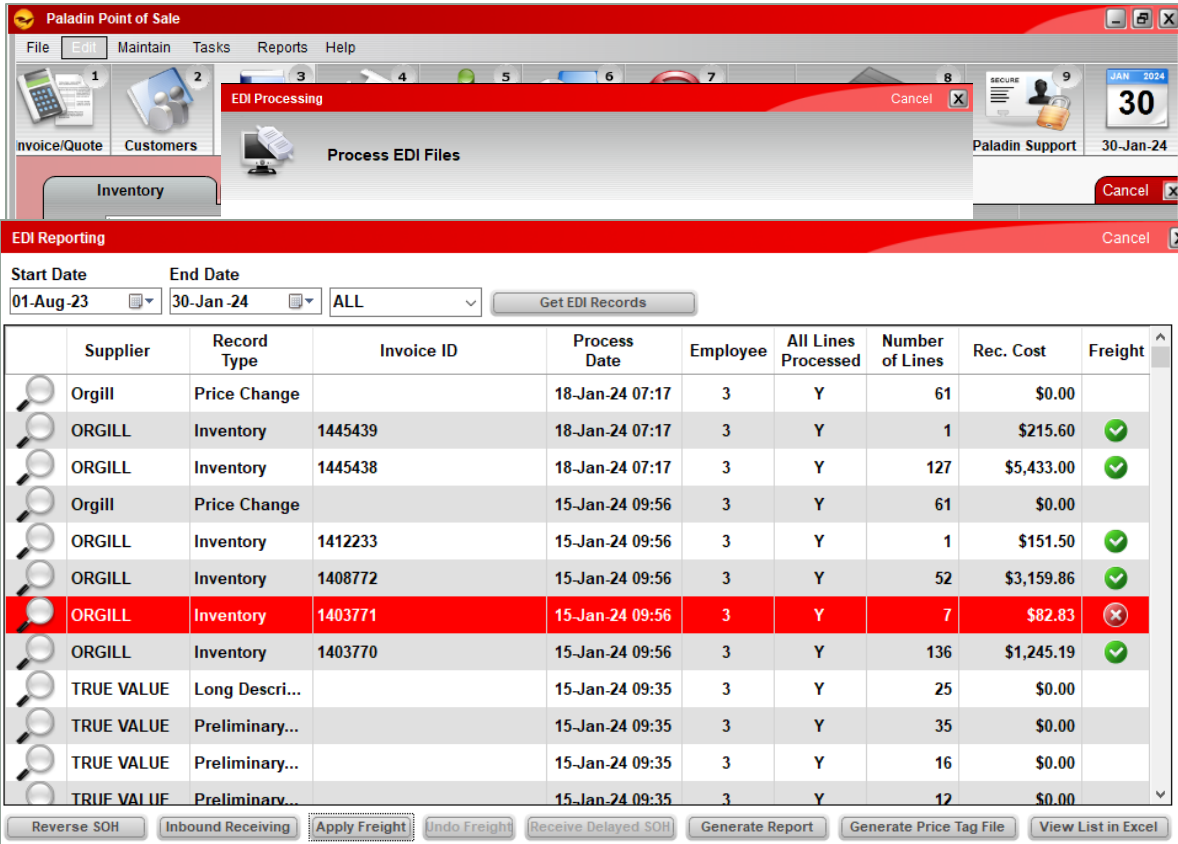
Receiving a manual PO

1. Select the **PO** module.
2. Select **F5 Receive PO Mode**.
3. Select **F6 Find PO**.
4. Select the desired Open PO and press **F12 Open**.
5. Edit the Quantity and Cost as received on your invoice then press **F8 Process**.
6. On the Confirm Receive and Total window, press **F1 Process**.
7. Enter **Freight Cost** if any and press enter.
8. 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.



Paladyn Point of Sale

File Edit Maintain Tasks Reports Help

EDI Processing Cancel X

Process EDI Files

Paladin Support 30-Jan-24

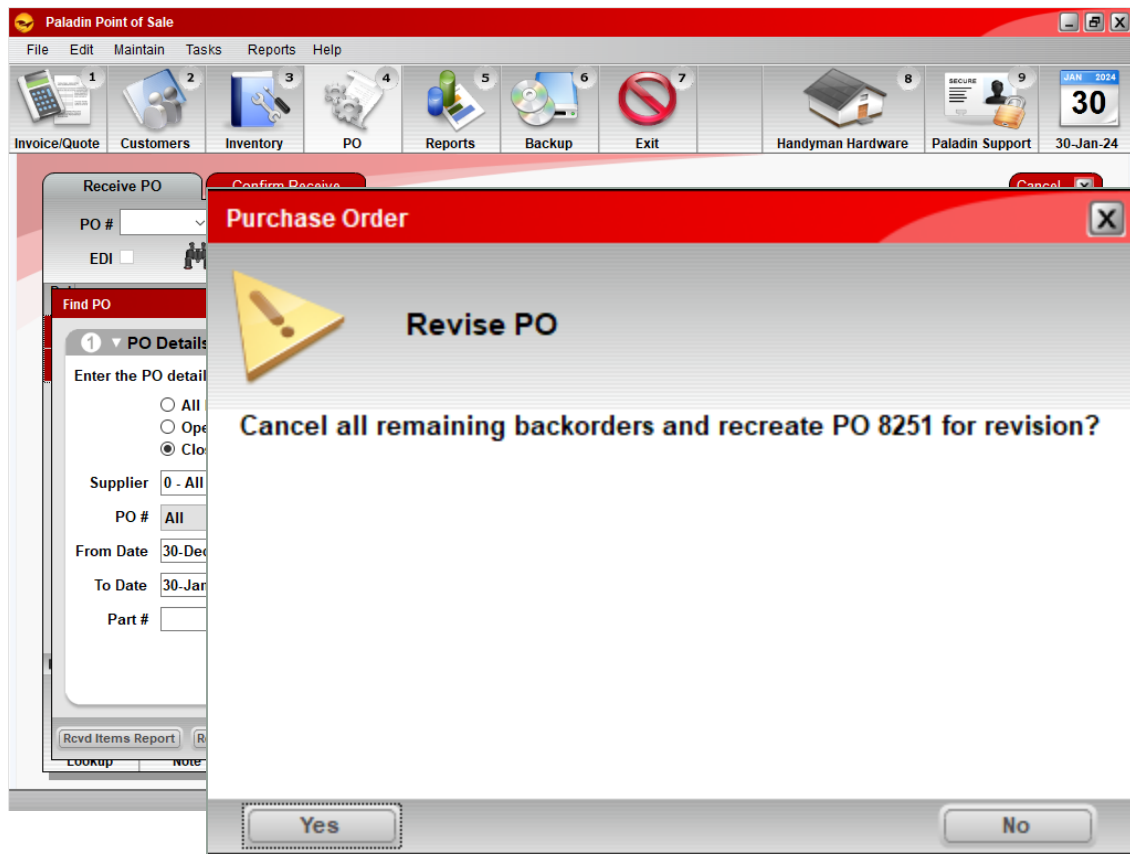
EDI Reporting Cancel X

Start Date: 01-Aug-23 End Date: 30-Jan-24 ALL Get EDI Records

	Supplier	Record Type	Invoice ID	Process Date	Employee	All Lines Processed	Number of Lines	Rec. Cost	Freight
	Orgill	Price Change		18-Jan-24 07:17	3	Y	61	\$0.00	
	ORGILL	Inventory	1445439	18-Jan-24 07:17	3	Y	1	\$215.60	✓
	ORGILL	Inventory	1445438	18-Jan-24 07:17	3	Y	127	\$5,433.00	✓
	Orgill	Price Change		15-Jan-24 09:56	3	Y	61	\$0.00	
	ORGILL	Inventory	1412233	15-Jan-24 09:56	3	Y	1	\$151.50	✓
	ORGILL	Inventory	1408772	15-Jan-24 09:56	3	Y	52	\$3,159.86	✓
	ORGILL	Inventory	1403771	15-Jan-24 09:56	3	Y	7	\$82.83	✗
	ORGILL	Inventory	1403770	15-Jan-24 09:56	3	Y	136	\$1,245.19	✓
	TRUE VALUE	Long Descri...		15-Jan-24 09:35	3	Y	25	\$0.00	
	TRUE VALUE	Preliminary...		15-Jan-24 09:35	3	Y	35	\$0.00	
	TRUE VALUE	Preliminary...		15-Jan-24 09:35	3	Y	16	\$0.00	
	TRUE VALUE	Preliminary...		15-Jan-24 09:35	3	Y	12	\$0.00	

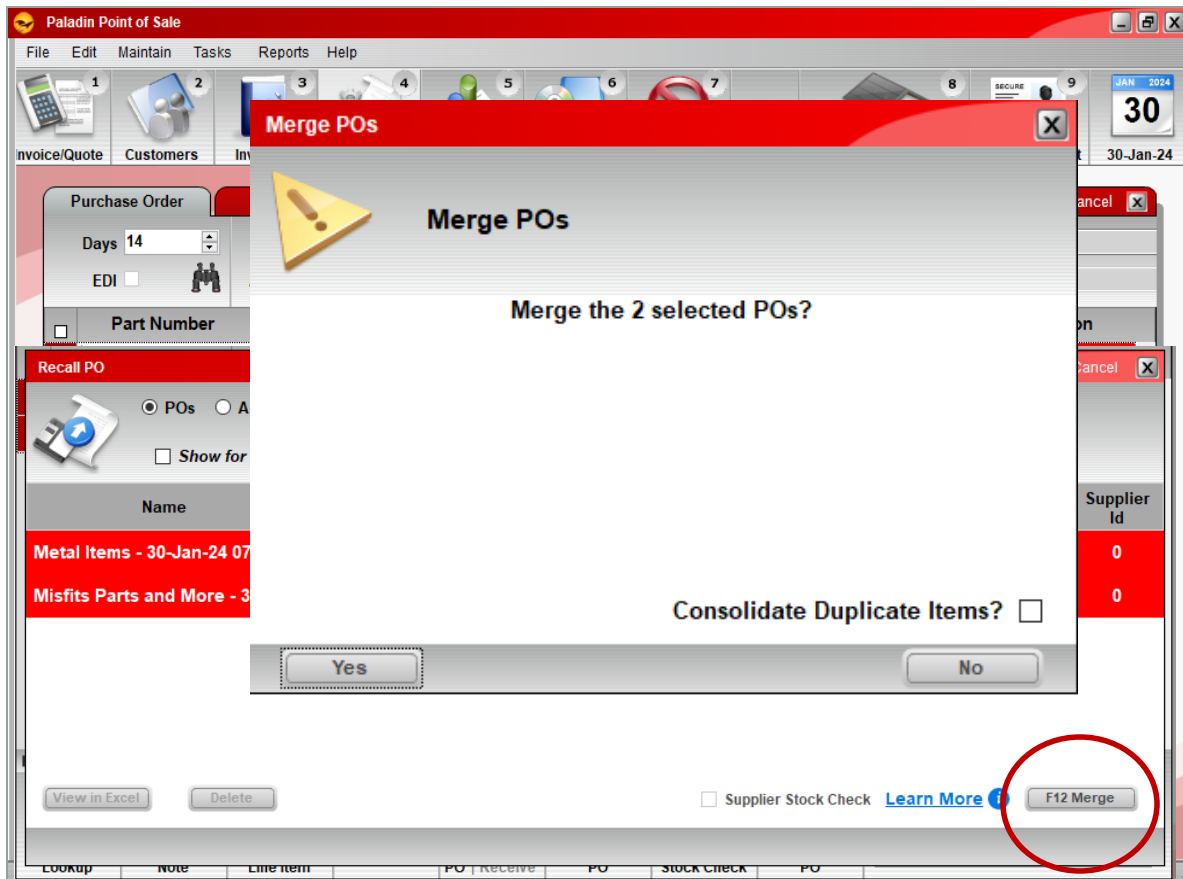
Reverse SOH Inbound Receiving Apply Freight Undo Freight Receive Delayed SOH Generate Report Generate Price Tag File View List in Excel

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.

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:

Purchase Orders Potpourri:
Everything You Need to Know About the Paladin
Purchase Order Module and Features – Part 2

February 20

9am PT

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