



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

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## **WHAT YOU'LL LEARN**

- Review from POs – Part 1.
  - Setup options in PO configuration.
  - Applying freight to PO invoices during receiving.
  - Applying freight to received EDI invoices.
  - Adding instructions to a PO.
  - How instructions are displayed on the PO invoice.
- 
- Confirm PO Screen Note Field.
  - Set up individual supplier costs for items on Pos.
  - Update supplier market cost upon EDI receiving event.
  - Update supplier market cost upon PO invoice receiving event.
  - Purchase Order Importer.

## Review from POs – Part 1

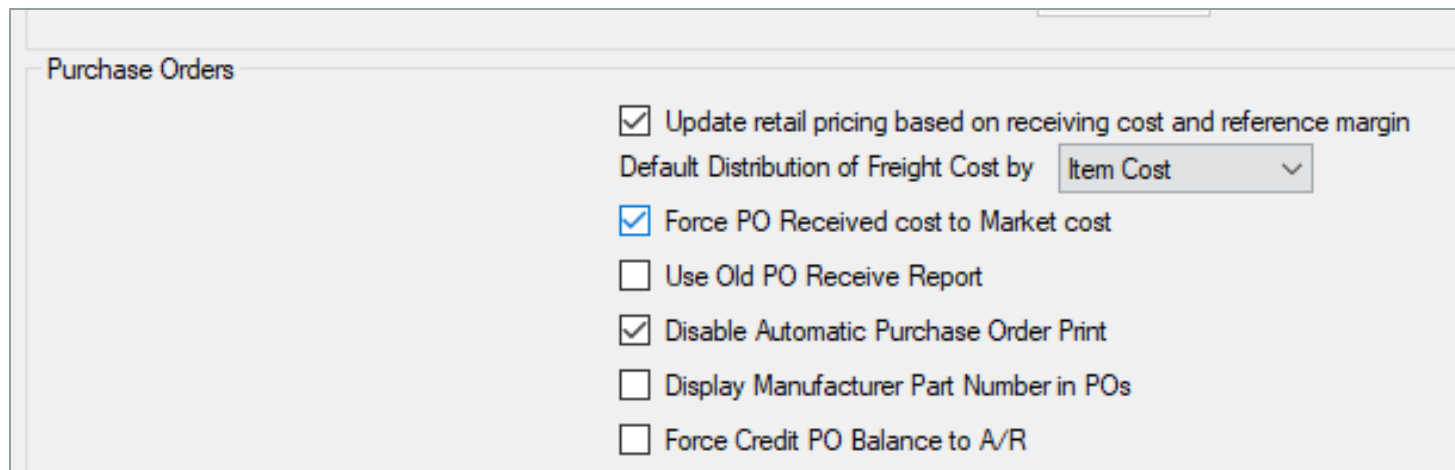


- Advantages of using POs in Paladin.
- The various methods of creating POs.
- Creating, confirming and sending POs.
- Recalling and sending a stored PO.
- Receiving a manual PO.
- Receiving an EDI PO.
- Resending an Open PO to suppliers.
- Merge stored POs.

## Setup options in PO configuration

In Paladin, from the main menu, select **File -> Setup -> Company** tab – **Purchase Orders**

- **Fixed margin pricing** option when receiving PO (via manual or EDI PO)
- Distribute freight costs by **item cost** or **weight**.
- Force PO **received cost** to **market cost**.
- **Disable automatic printing** of PO's.
- Display **manufacturer part numbers** on PO's. (Warning - Not feasible with Dual EDI)
- Force credit balance **PO balance to A/R**. Can automatically create statements for credits



Purchase Orders

- Update retail pricing based on receiving cost and reference margin
- Default Distribution of Freight Cost by
- Force PO Received cost to Market cost
- Use Old PO Receive Report
- Disable Automatic Purchase Order Print
- Display Manufacturer Part Number in POs
- Force Credit PO Balance to A/R

# Applying freight to PO invoices during receiving

Receive PO **Confirm Receive** Cancel

PO #  Supplier  Address 2  Phone   
EDI  Address 1  City/State/Zip  Fax

**Find PO** Cancel

1 PO Details  
Enter the PO details below:  
 All POs  
 Open POs  
 Closed POs  
Supplier   
PO #   
From Date   
To Date   
Part #

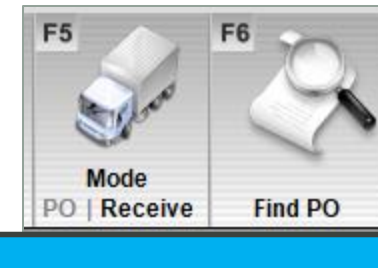
2 Matching Purchase Orders

PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
285	DEALER'S CHOICE	19-Feb-24	5	\$267.50	\$0.00	<input type="checkbox"/>

Rcvd Items Report Recvd PO Reports Print Item Tags Create Item Tag File Copy PO Cancel B/O Revise PO **F12 Open**

Lookup Note Received Open | All PO | Receive Find PO RF Receiving Process

1. In Paladin, go to the (Alt+4) **PO Module**.
2. Select **F5 PO Receive Mode**
3. Select **F6 Find PO**.
4. Select an Open PO and press **F12 Open**.



# Applying freight to PO invoices during receiving (cont'd)

Receive PO **Confirm Receive** Cancel

PO # 3003 Supplier 39 - THE GORILLA GLUE COMP/ Address 2 Phone 800-966-3458  
 EDI Address 1 2125 E. Kemper Road City/State/Zip Cincinnati, OH, 45241 Fax 800-522-7553

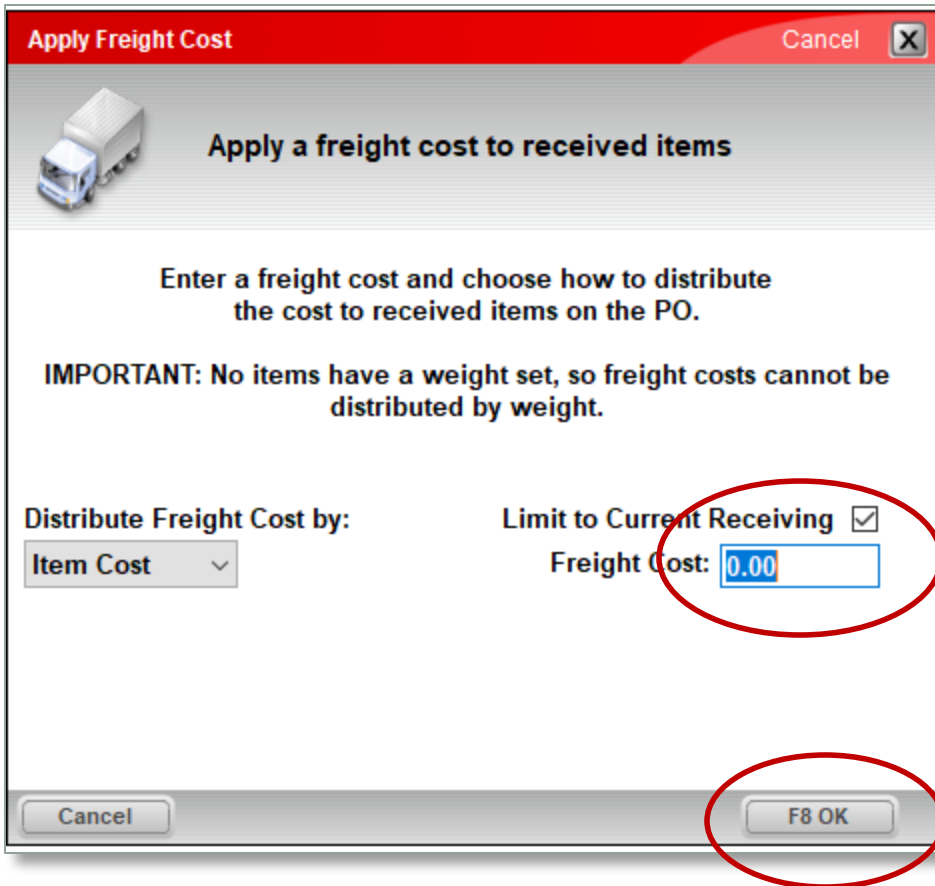
Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	1590611	GORILLA SUPERGLUE 15GM EACH	1	1	\$ 3.510	\$ 3.51
	1590611	4 Old Cost: \$3.510 Old Sell: \$8.59 Mar: 59% Ref Mar: 00% New Sell: \$8.59 Mar: 59%	0			
<input type="checkbox"/>	1590587	GORILLA GLUE ORGNL 2OZ EACH	1	1	\$ 4.210	\$ 4.21
	1590587	5 Old Cost: \$4.210 Old Sell: \$8.59 Mar: 51% Ref Mar: 00% New Sell: \$8.59 Mar: 51%	0			
<input type="checkbox"/>	1590496	GORILLA GLUE ORGNL 4OZ EACH	1	1	\$ 6.080	\$ 6.08
	1590496	6 Old Cost: \$6.080 Old Sell: \$11.99 Mar: 49% Ref Mar: 00% New Sell: \$11.99 Mar: 49%	0			
<input type="checkbox"/>	1590470	GORILLA SUPERGLUE GEL15G EACH	1	1	\$ 3.510	\$ 3.51
	1590470	7 Old Cost: \$3.510 Old Sell: \$8.59 Mar: 59% Ref Mar: 00% New Sell: \$8.59 Mar: 59%	0			
			ORD			
			REC			
Total \$						17.31

F1 Process  
 F2   
 F3 Zero Qty Received  
 F4 Displaying Open | All  
 F5 Recall Inventory  
 F6 Find PO  
 F7 Review RF Receiving  
 F8 Process


5. After selecting and opening the PO, select **F8 Process**.

6. Then select **F1 Process**.

## Applying freight to PO invoices during receiving (cont'd)



**Apply Freight Cost** Cancel X

 **Apply a freight cost to received items**

Enter a freight cost and choose how to distribute the cost to received items on the PO.

**IMPORTANT:** No items have a weight set, so freight costs cannot be distributed by weight.

Distribute Freight Cost by:

Limit to Current Receiving

Freight Cost:

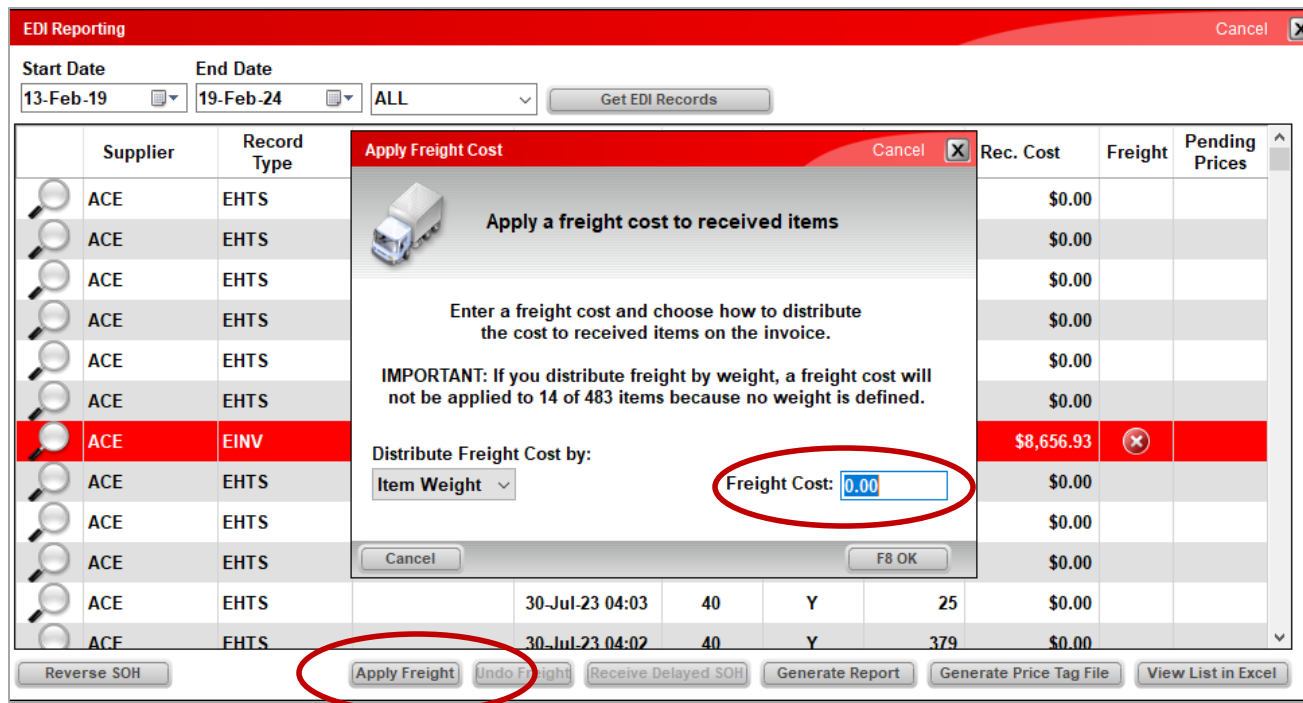
Cancel

7. The **Apply Freight Cost** window appears.
8. Enter the **Freight Cost**.
9. Click **F8 OK**.
10. Freight costs have been applied to cost of goods sold (COGS) based on item costs.

# Applying freight to received EDI invoices

To apply a freight cost after an EDI invoice is processed:

1. In Paladin, on the top ribbon, select the (Alt+3) **Inventory** module.
2. On the bottom ribbon of the module, click **F9 EDI**.
3. In the EDI Processing window, click **Reporting**.
4. In the EDI Reporting window, invoices that are eligible for a freight cost have a red X icon in the Freight column. Highlight an invoice with a red X and click **Apply Freight**.



**EDI Reporting**

Start Date: 13-Feb-19 | End Date: 19-Feb-24 | Filter: ALL | Get EDI Records

Supplier	Record Type	Rec. Cost	Freight	Pending Prices
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	<b>EINV</b>	<b>\$8,656.93</b>	<b>X</b>	
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACE	EHTS	\$0.00		
ACF	EHTS	\$0.00		

**Apply Freight Cost** dialog box:

Apply a freight cost to received items

Enter a freight cost and choose how to distribute the cost to received items on the invoice.

IMPORTANT: If you distribute freight by weight, a freight cost will not be applied to 14 of 483 items because no weight is defined.

Distribute Freight Cost by: Item Weight

Freight Cost: 0.00

Buttons: Cancel, F8 OK, Apply Freight, Undo Freight, Receive Delayed SOH, Generate Report, Generate Price Tag File, View List in Excel



## Adding instructions to a PO



There are three steps to setting up and applying PO instructions:

1. Creating the various instructions.
2. Applying instructions to specific suppliers.
3. Adding instructions to the purchase order.

## Creating the various instructions

Payment Bill to 1	<input type="text" value="Handyman Hardware-123 Main St.,"/>
Payment Bill to 2	<input type="text"/>
Payment Bill to 3	<input type="text"/>
Payment Bill to 4	<input type="text"/>
Bill Freight to 1	<input type="text" value="Hardware For Life-4567 B St., Bend"/>
Bill Freight to 2	<input type="text"/>
Bill Freight to 3	<input type="text"/>
Bill Freight to 4	<input type="text"/>
Ship Via 1	<input type="text" value="UPS #282726222"/>
Ship Via 2	<input type="text" value="FEDX #9754-348337"/>
Ship Via 3	<input type="text"/>
Ship Via 4	<input type="text"/>

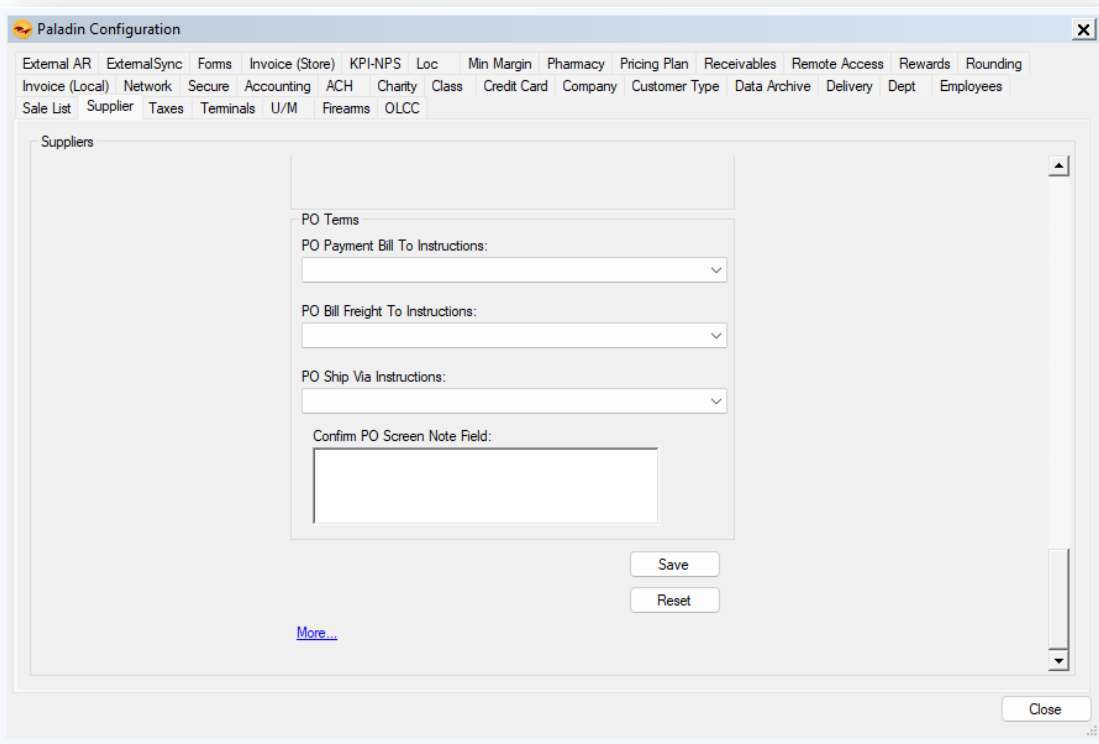
Purchase order supplier instructions can be added for: **Payment Bill To**, **Bill Freight To**, and **Ship Via**. Four per category are allowed.

To create the instructions:

1. From the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. In the **Purchase Orders** pane, enter instructions in each associated box.
4. Click **Save**, then click **Close**.
5. Close and restart Paladin.

Note: If not all instructions are needed, any of the boxes can be left blank.

## Applying instructions to specific suppliers



The screenshot shows the 'Paladin Configuration' window with the 'Supplier' tab selected. The 'Suppliers' pane is active, displaying the 'PO Terms' section. This section includes three dropdown menus for 'PO Payment Bill To Instructions', 'PO Bill Freight To Instructions', and 'PO Ship Via Instructions', each with a downward arrow. Below these is a text input field for 'Confirm PO Screen Note Field'. At the bottom of the pane are 'Save' and 'Reset' buttons, and a 'More...' link. The window title bar shows 'Paladin Configuration' and a 'Close' button. The menu bar includes: External AR, ExternalSync, Foms, Invoice (Store), KPI-NPS, Loc, Min Margin, Pharmacy, Pricing Plan, Receivables, Remote Access, Rewards, Rounding, Invoice (Local), Network, Secure, Accounting, ACH, Charity, Class, Credit Card, Company, Customer Type, Data Archive, Delivery, Dept, Employees, Sale List, Supplier, Taxes, Terminals, U/M, Firearms, OLCC.

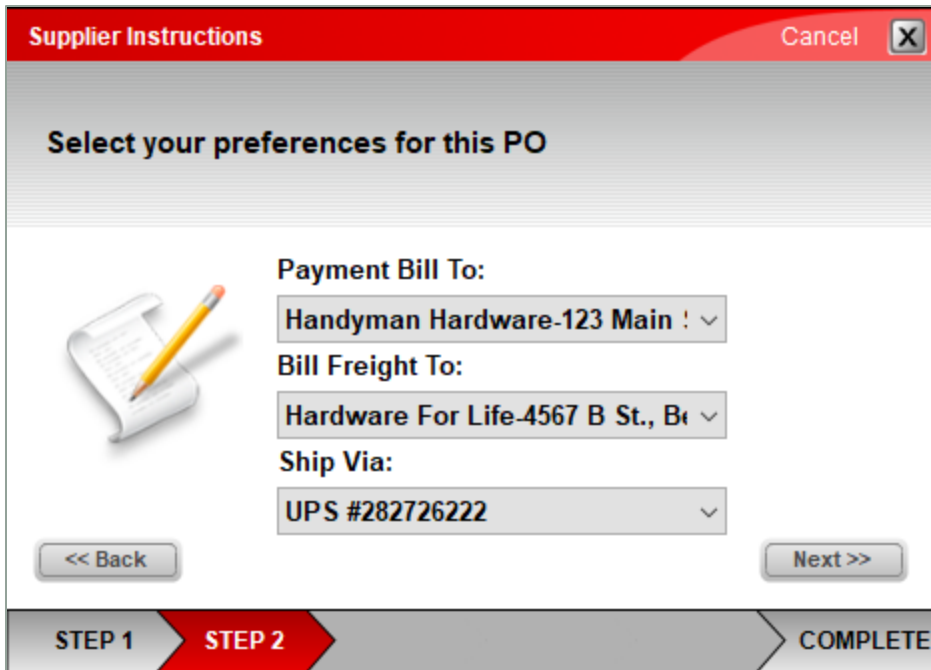
To assign specific instructions to a supplier's vendor profile:

1. From the main menu, select **File > Setup**.
2. Select the **Supplier** tab.
3. In the **PO Terms** pane, purchase order instructions that were set in the **Company** tab can now be selected from the lists:
  - **PO Payment Bill To Instructions:**
  - **PO Bill Freight To Instructions:**
  - **PO Ship Via Instructions:**

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


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

## Adding instructions to the purchase order



Supplier Instructions Cancel X

Select your preferences for this PO



Payment Bill To:  
Handyman Hardware-123 Main !

Bill Freight To:  
Hardware For Life-4567 B St., B

Ship Via:  
UPS #282726222

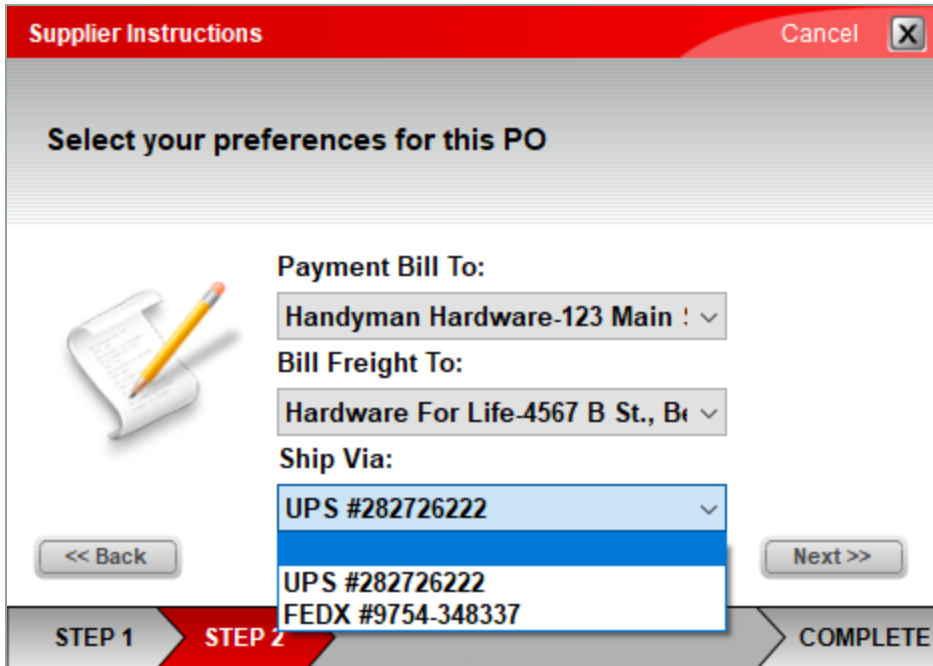
<< Back Next >>

STEP 1 **STEP 2** COMPLETE

To add instructions in a purchase order:

1. On the top ribbon, select the **PO** module.
2. Enter or select a supplier from the **Supplier** list.
3. Add items to the purchase order, then click **F8 Confirm PO**.
4. Click **F1 Buy**.
5. Optionally, in the **PO Number** window, enter a **PO Number** or leave blank.
6. Default instructions will be auto-filled in.


## How to change supplier instructions in a PO



The screenshot shows a software window titled "Supplier Instructions" with a red header bar. The window contains a form for selecting preferences for a purchase order. The form has three main sections: "Payment Bill To:", "Bill Freight To:", and "Ship Via:". Each section has a dropdown menu. The "Payment Bill To:" dropdown is set to "Handyman Hardware-123 Main". The "Bill Freight To:" dropdown is set to "Hardware For Life-4567 B St., Bt". The "Ship Via:" dropdown is open, showing three options: "UPS #282726222" (highlighted in blue), "UPS #282726222", and "FEDX #9754-348337". There are "Back" and "Next" buttons on the left and right sides of the form. At the bottom, there is a progress bar with three steps: "STEP 1", "STEP 2" (highlighted in red), and "COMPLETE".

Supplier Instructions Cancel X

Select your preferences for this PO

 Payment Bill To:  
Handyman Hardware-123 Main ! ▾

Bill Freight To:  
Hardware For Life-4567 B St., Bt ▾

Ship Via:  
UPS #282726222 ▾  
UPS #282726222  
FEDX #9754-348337

<< Back Next >>

STEP 1 **STEP 2** COMPLETE

To change purchase order instructions in a purchase order:

1. In the **Supplier Instructions** window, use the dropdown buttons to select a different **Payment Bill To, Bill Freight To, or Ship Via** instruction.

# How the instructions are displayed on the purchase order

Receive PO
Confirm Receive
Cancel

PO #

Supplier

Address 2

Phone


EDI


Address 1


City/State/Zip


Fax


Del <input type="checkbox"/>	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>		Bill to: Handyman Hardware-123 Main St., Bend, OR			NOTES	
<input type="checkbox"/>		Bill freight to: Hardware For Life-4567 B St., Bend, OR			NOTES	
<input type="checkbox"/>		Ship via: FEDX #9754-348337			NOTES	
<input type="checkbox"/>	10836	GLUE DUCO 5MIN 1OZ EACH	1	1	\$ 1.390	\$ 1.39
	10836	4 Old Cost: \$1.390 Old Sell: \$4.59 Mar: 70% Ref Mar: 00% New Sell: \$4.59 Mar: 70%	0			
<input type="checkbox"/>	1005552	GLUE LIQ NAIL CLR 4 OZ EACH	1	1	\$ 1.584	\$ 1.58
	1005552	5 Old Cost: \$1.584 Old Sell: \$4.19 Mar: 62% Ref Mar: 00% New Sell: \$4.19 Mar: 62%	0			


  
 F1  
 Advanced  
 Lookup


  
 F2  
 Add  
 Note


  
 F3  
 Zero Qty  
 Received

  
 F4  
 Displaying  
 Open | All

  
 F5  
 Recall  
 Inventory

  
 F6  
 Find PO

  
 F7  
 Review  
 RF Receiving

  
 F8  
 Process

**Total \$ 11.71**

# Confirm PO Screen Note Field

Purchase Order Confirm PO Cancel X

Days 14 Supplier 39 - THE GORILLA GLUE COMP/ Address 2 Phone 800-966-3458  
EDI  Address 1 2125 E. Kemper Road City/State/Zip Cincinnati, OH, 45241 Fax 800-522-7553

**Supplier Messages**  
Minimum order is \$1,200 or service charges of \$300 apply.

**AMOUNT DUE**

Suppliers

PO Terms  
PO Payment Bill To Instructions:  
Handyman Hardware-123 Main St., Bend, OR

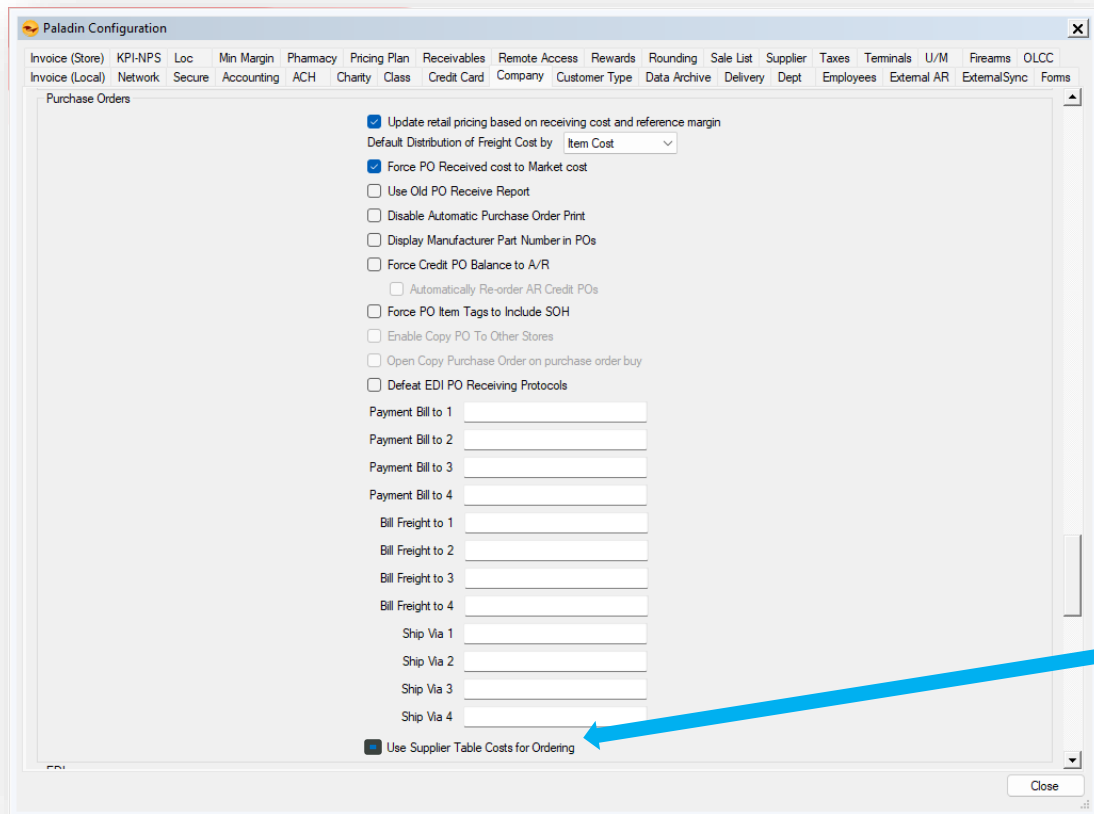
PO Bill Freight To Instructions:  
Hardware For Life-4567 B St., Bend, OR

PO Ship Via Instructions:  
UPS #282726222

Confirm PO Screen Note Field:  
Minimum order is \$1,200 or service charges of \$300 apply.

Buy Store PO Print Test Copy Save Reset

# Set up individual supplier costs for items on POs



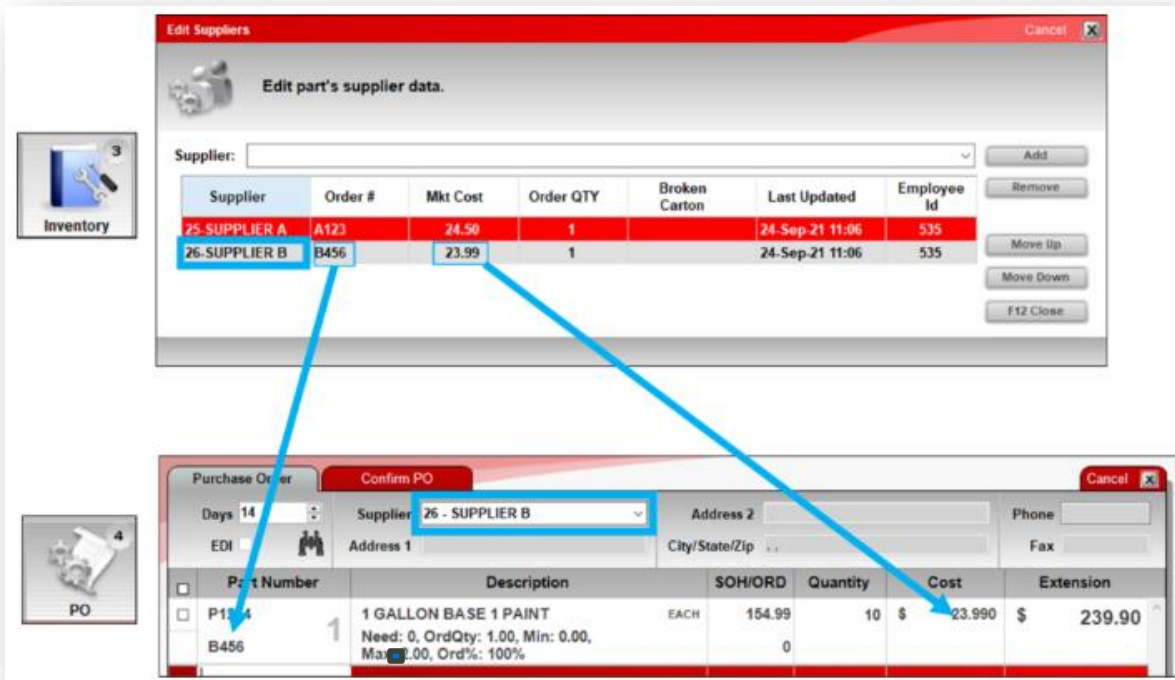
- When this feature is turned on, these supplier costs are used for purchase orders instead of the default market cost.

How to turn on the supplier cost feature:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Company** tab.
3. On the bottom of the **Purchase Orders** pane, check **Use Supplier Table Costs for Ordering**.
4. Click **Save**, then click **Close**.



## Apply supplier costs during ordering



The screenshot displays two windows from a software application. The top window, titled "Edit Suppliers", contains a table with the following data:

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

The bottom window, titled "Purchase Order", shows a table with the following data:

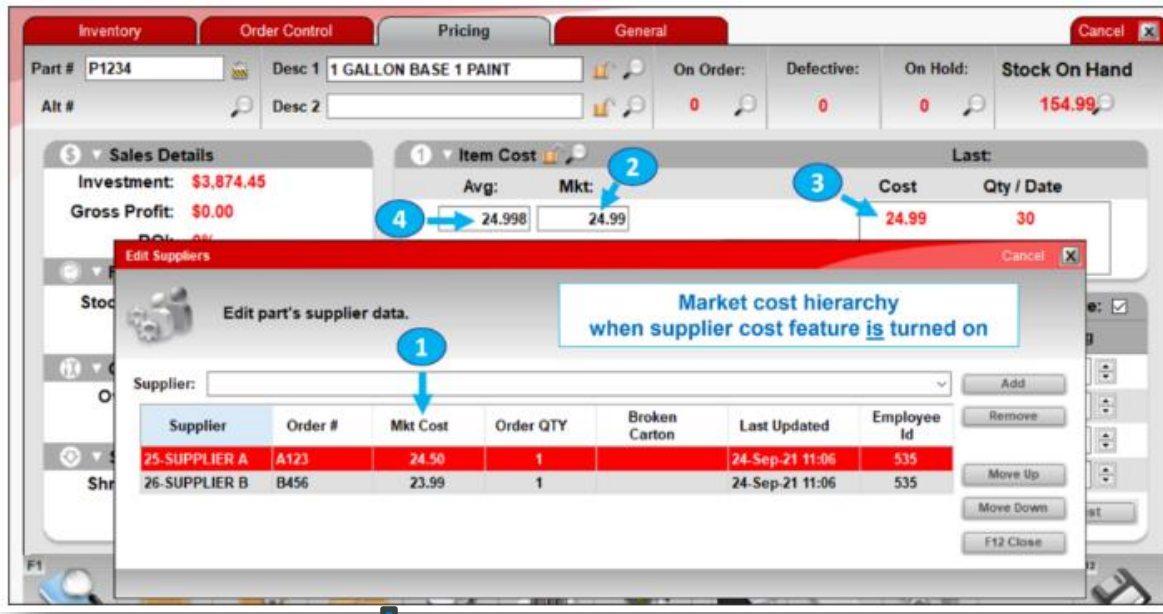
Part Number	Description	SOH/ORD	Quantity	Cost	Extension
P114	1 GALLON BASE 1 PAINT	EACH 154.99	10	\$ 23.990	\$ 239.90
B456	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 2.00, Ord%: 100%	0			

Blue arrows indicate the flow of data: one arrow points from the "Supplier" column in the "Edit Suppliers" table to the "Supplier" dropdown menu in the "Purchase Order" window, and another arrow points from the "Mkt Cost" column in the "Edit Suppliers" table to the "Cost" column in the "Purchase Order" table.

1. In Paladin, on the top ribbon, select the **PO** module.
2. Enter or select the supplier from the **Supplier** list.
3. Add an item to the purchase order.

If a supplier cost is a defined cost for this supplier, it will be used as the item cost.

## Apply supplier costs during ordering (cont'd)



The screenshot shows the 'Pricing' tab for item P1234 (1 GALLON BASE 1 PAINT). The 'Item Cost' pane displays the following values:

Item Cost	Value
Avg	24.998
Mkt	24.99
Cost	24.99
Qty / Date	30

The 'Edit Suppliers' dialog box is open, showing a table of suppliers:

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

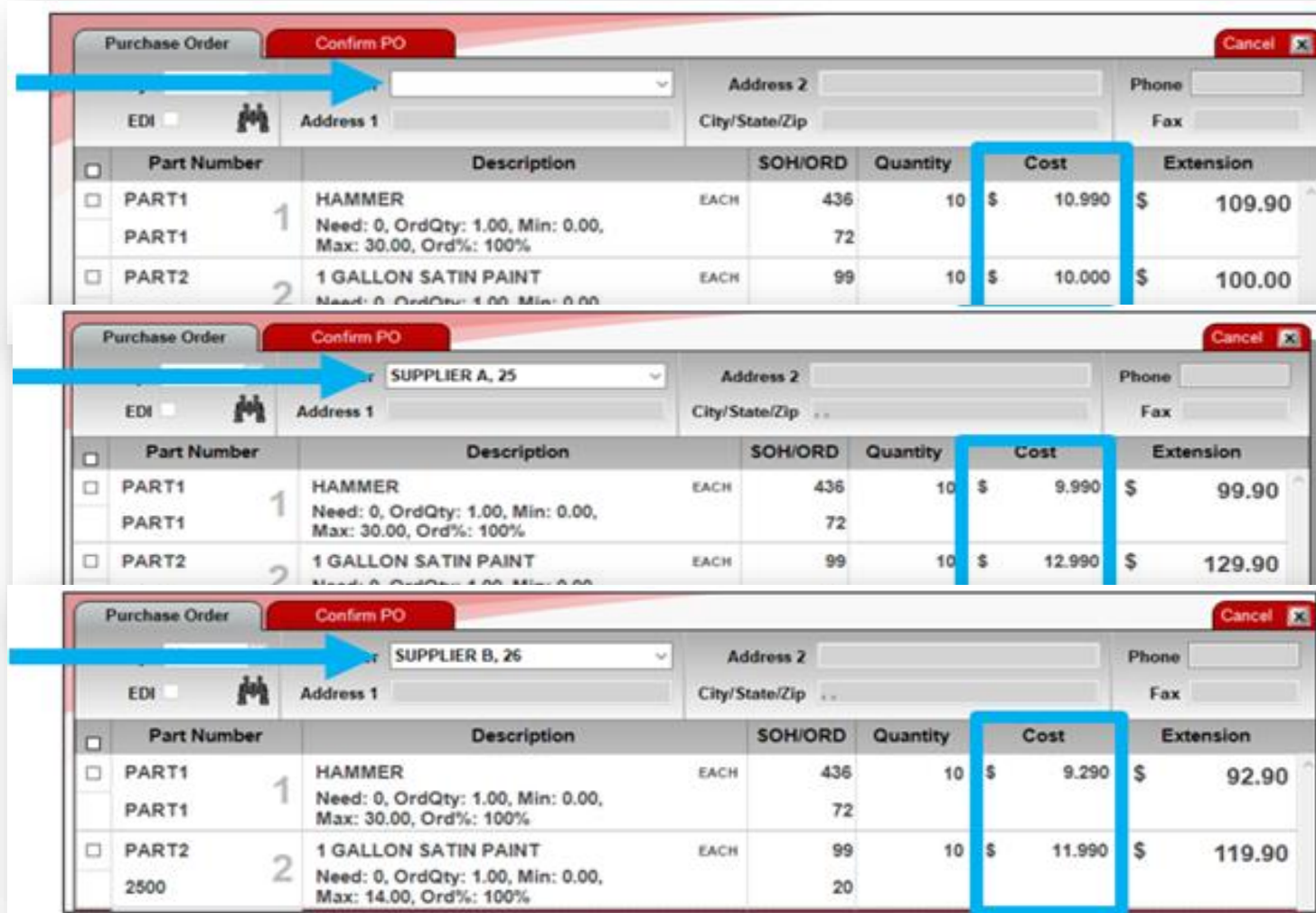
A callout box indicates: "Market cost hierarchy when supplier cost feature is turned on".

If a **Supplier Market Cost (1)** is not defined or is zero, the default cost is used. The default cost is set to the first non-zero value in this list of values on the **Pricing** tab in the **Item Cost** pane:

**Mkt cost (2) – Last Cost (3) – Avg cost (4)**

4. Click **F1 Process**, then click **F1 Buy** to complete the purchase order.

**Note:** If you change suppliers after you've added items to the purchase order, costs will adjust to the current supplier.



**Scenario 1: Supplier A**

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1	HAMMER	EACH 436	10	\$ 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	\$ 10.000	\$ 100.00
PART2	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%				

**Scenario 2: Supplier B**

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1	HAMMER	EACH 436	10	\$ 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	10	\$ 12.990	\$ 129.90
PART2	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 30.00, Ord%: 100%				

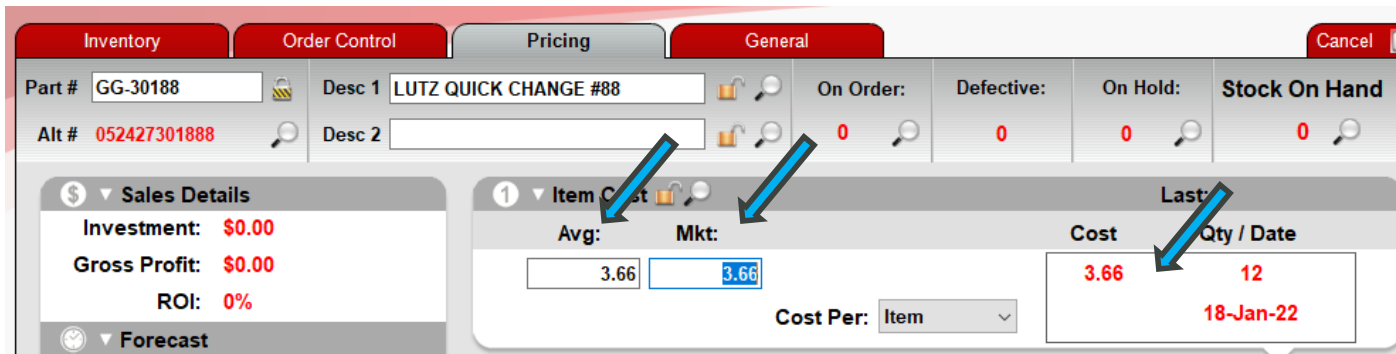
**Scenario 3: Supplier C**

Part Number	Description	SOH/ORD	Quantity	Cost	Extension
PART1	HAMMER	EACH 436	10	\$ 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	10	\$ 11.990	\$ 119.90
2500	Need: 0, OrdQty: 1.00, Min: 0.00, Max: 14.00, Ord%: 100%	20			

## Apply supplier costs during ordering (cont'd)

- Note:** If the cost of an item changes after you have stored the PO, the original costs are retained in the purchase order.

# Update supplier market cost upon EDI receiving event



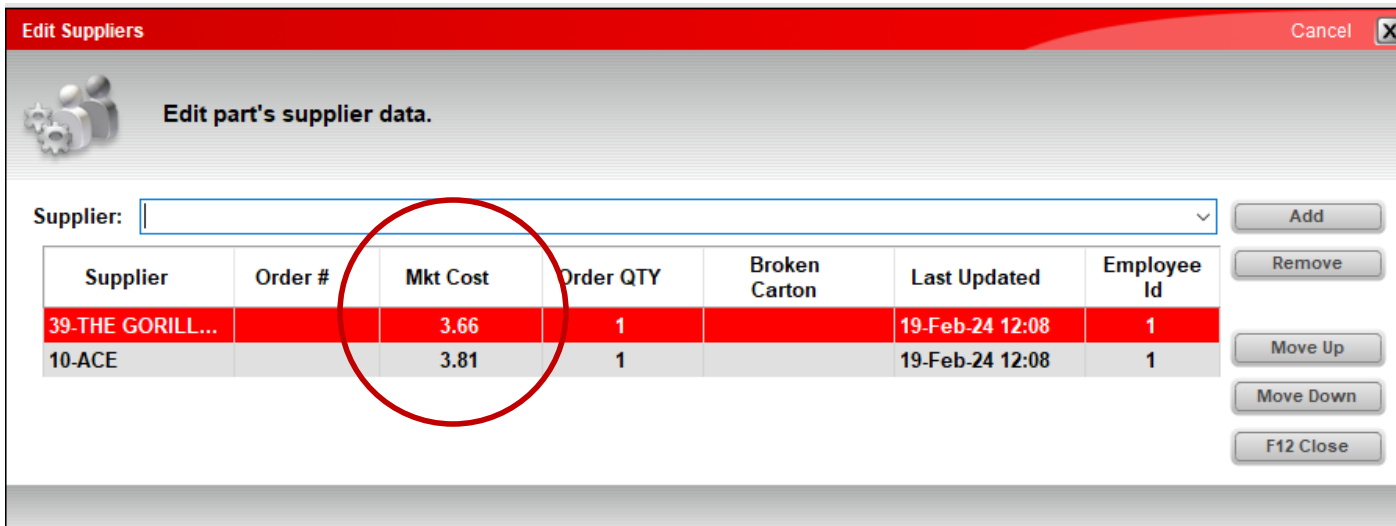
Part # GG-30188 Desc 1 LUTZ QUICK CHANGE #88 On Order: 0 Defective: 0 On Hold: 0 Stock On Hand 0

Alt # 052427301888 Desc 2

Sales Details: Investment: \$0.00, Gross Profit: \$0.00, ROI: 0%

Item Cost: Avg: 3.66, Mkt: 3.66, Cost: 3.66, Qty / Date: 12, 18-Jan-22

Cost Per: Item



Edit Suppliers

Edit part's supplier data.

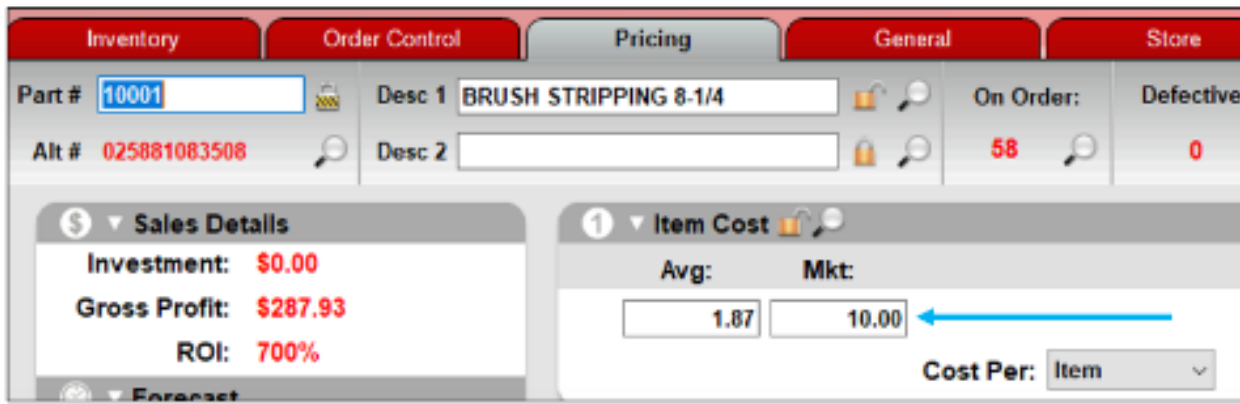
Supplier: [Dropdown]

Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated	Employee Id
39-THE GORILL...		3.66	1		19-Feb-24 12:08	1
10-ACE		3.81	1		19-Feb-24 12:08	1

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

- This feature allows **supplier market cost** to be updated with most supplier integrations during the EDI file maintenance and invoice upload process.
- In addition, the **last cost** and **average cost**, and potentially the **market cost** are also updated with the EDI upload process depending on the configuration settings.

# Update supplier market cost upon PO invoice receiving event



Inventory Order Control **Pricing** General Store

Part #  Desc 1 BRUSH STRIPPING 8-1/4 On Order: Defective  
 Alt # 025881083508 Desc 2 58 0

Sales Details  
 Investment: \$0.00  
 Gross Profit: \$287.93  
 ROI: 700%

Item Cost  
 Avg: 1.87 Mkt: 10.00  
 Cost Per: Item

- This feature allows manual changing of market cost for both EDI and non-EDI suppliers.
- This allows two market costs for the same supplier to exist: One market cost on Paladin's **Inventory** module > **Pricing** tab and the supplier cost on the **Edit Suppliers** window.



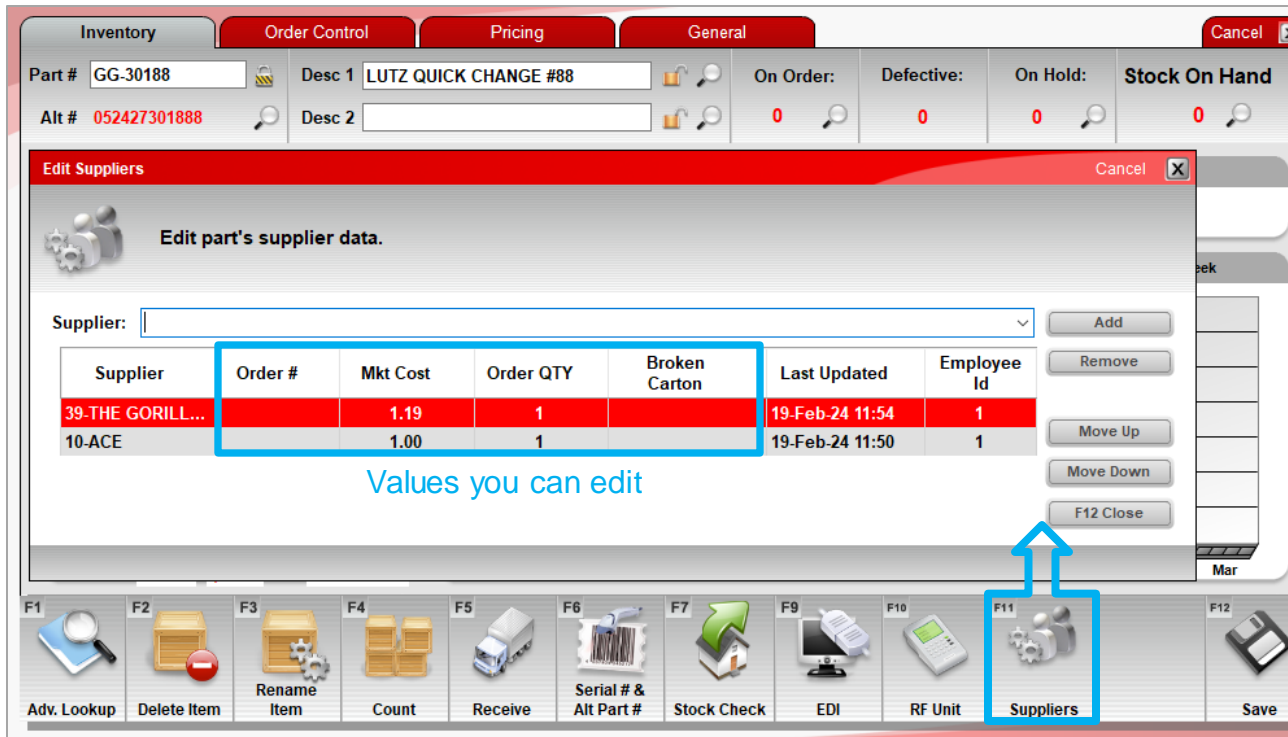
Edit Suppliers

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
10-ACE		11.00	1		19-Jun-23 13:09	1
2-ECM INDUSTR...		1.00	1		19-Jun-23 11:08	1
2000-TEST		12.00	1		21-Jun-23 09:49	1

# Set market costs, other order data for individual suppliers



Inventory

Part # GG-30188 Desc 1 LUTZ QUICK CHANGE #88 On Order: 0 Defective: 0 On Hold: 0 Stock On Hand 0

Alt # 052427301888 Desc 2

**Edit Suppliers**

Edit part's supplier data.

Supplier: [Dropdown]

Supplier	Order #	Mkt Cost	Order QTY	Broken Carton	Last Updated	Employee Id
39-THE GORILL...		1.19	1		19-Feb-24 11:54	1
10-ACE		1.00	1		19-Feb-24 11:50	1

Values you can edit

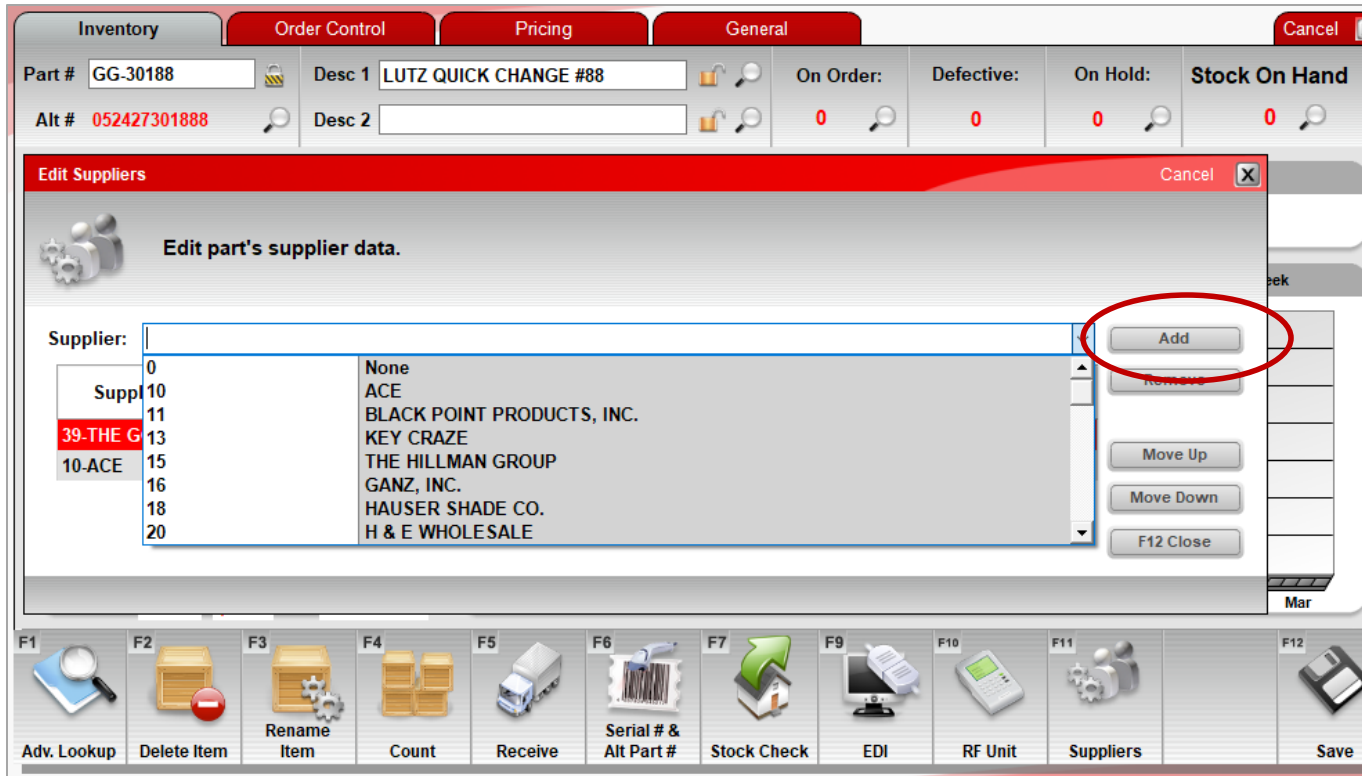
Buttons: Add, Remove, Move Up, Move Down, F12 Close

Bottom Ribbon: F1 Adv. Lookup, F2 Delete Item, F3 Rename Item, F4 Count, F5 Receive, F6 Serial # & Alt Part #, F7 Stock Check, F9 EDI, F10 RF Unit, **F11 Suppliers**, F12 Save

1. In Paladin, on the top ribbon, select the **Inventory** module.
2. Open the inventory item.
3. On the bottom ribbon of the module, click **F11 Suppliers**.
4. In the **Edit Suppliers** window, click a supplier's market cost (**Mkt Cost**) to edit it. The following values can also be edited:
  - **Order #**
  - **Order QTY**
  - **Broken Carton**



## Set market costs, other order data for individual suppliers (cont'd)



The screenshot displays the 'Edit Suppliers' dialog box. The background window shows the following information:

Part #	Desc 1	On Order:	Defective:	On Hold:	Stock On Hand
GG-30188	LUTZ QUICK CHANGE #88	0	0	0	0

The 'Edit Suppliers' dialog box contains the following table:

Supplier:	
0	None
10	ACE
11	BLACK POINT PRODUCTS, INC.
13	KEY CRAZE
15	THE HILLMAN GROUP
16	GANZ, INC.
18	HAUSER SHADE CO.
20	H & E WHOLESALE

The 'Add' button is circled in red. The bottom toolbar includes the following icons and labels:

F1	F2	F3	F4	F5	F6	F7	F9	F10	F11	F12
Adv. Lookup	Delete Item	Rename Item	Count	Receive	Serial # & Alt Part #	Stock Check	EDI	RF Unit	Suppliers	Save

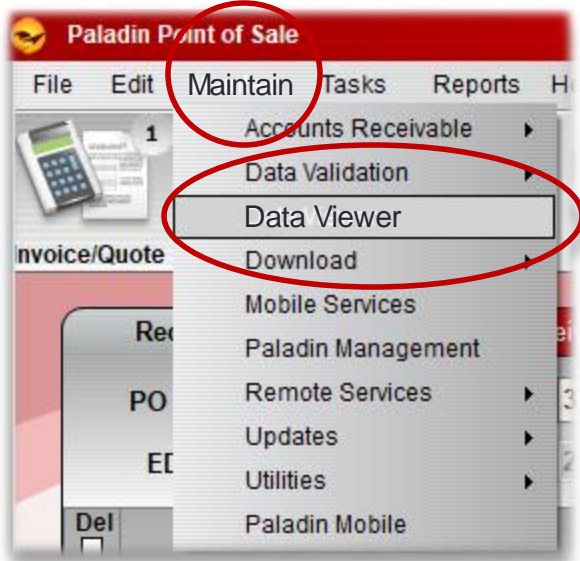
5. To add a new supplier to the list, in the **Supplier** list, select the supplier and click **Add**.
6. When you are finished with your changes, click **F12 Close**. If you changed a supplier's market cost (**Mkt Cost**), the value will be used the next time you purchase this item from the supplier.

## Purchase Order Importer

You have the ability to automatically import a list of items and create pending purchase orders for active inventory items. You can then confirm, buy and receive these purchase orders quickly and efficiently. The PO importer is useful for:

- Automating the time-consuming task of manually updating inventory items that were received outside of the normal purchasing process such as items from a trade show purchase, a manufacturer's special promotion items, or non-EDI vendors that are willing to email invoices as an attached file.
- Determining from a large list of items which items are carried in the store. For example, if a supplier gives you a list of sale items, you can import the items and price information, create a purchase order that contains only those items that are in active inventory, and then modify the purchase order for those items you wish to purchase.

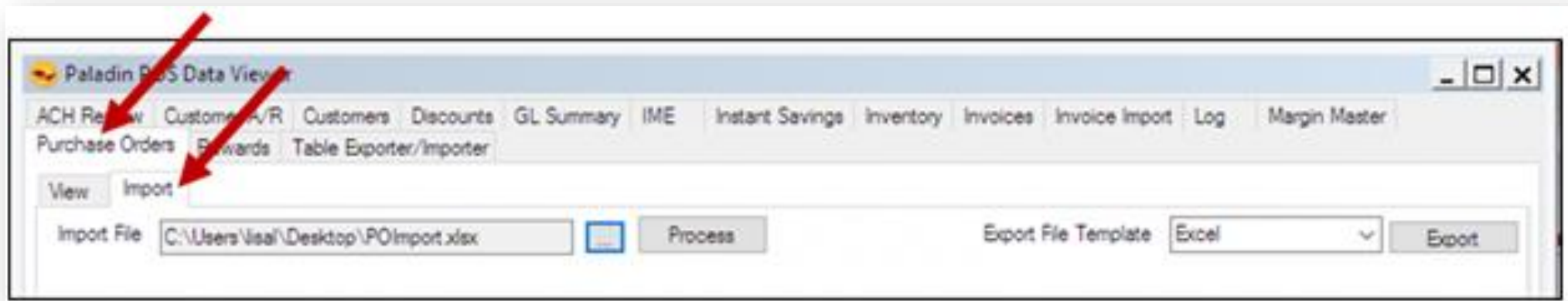




## Using the Purchase Order Importer

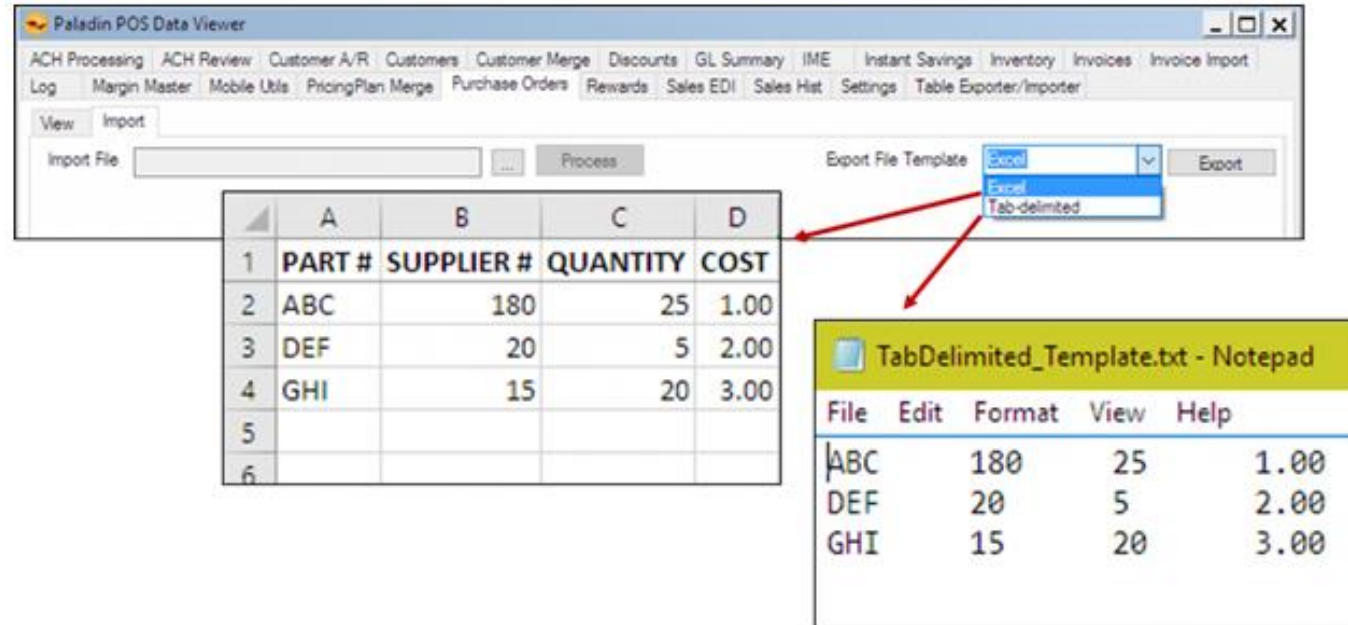
In Paladin, from the top menu, select **Maintain > Data Viewer**.

1. Click the **Purchase Orders** tab
2. Then click the **Import** tab



## Using the Purchase Order Importer (cont'd)

- To import your list of items, in the **Export File Template** list, select the type of file format that you use. It must be one of the following file formats: **Excel (.xlsx)** and **Tab-delimited text file**



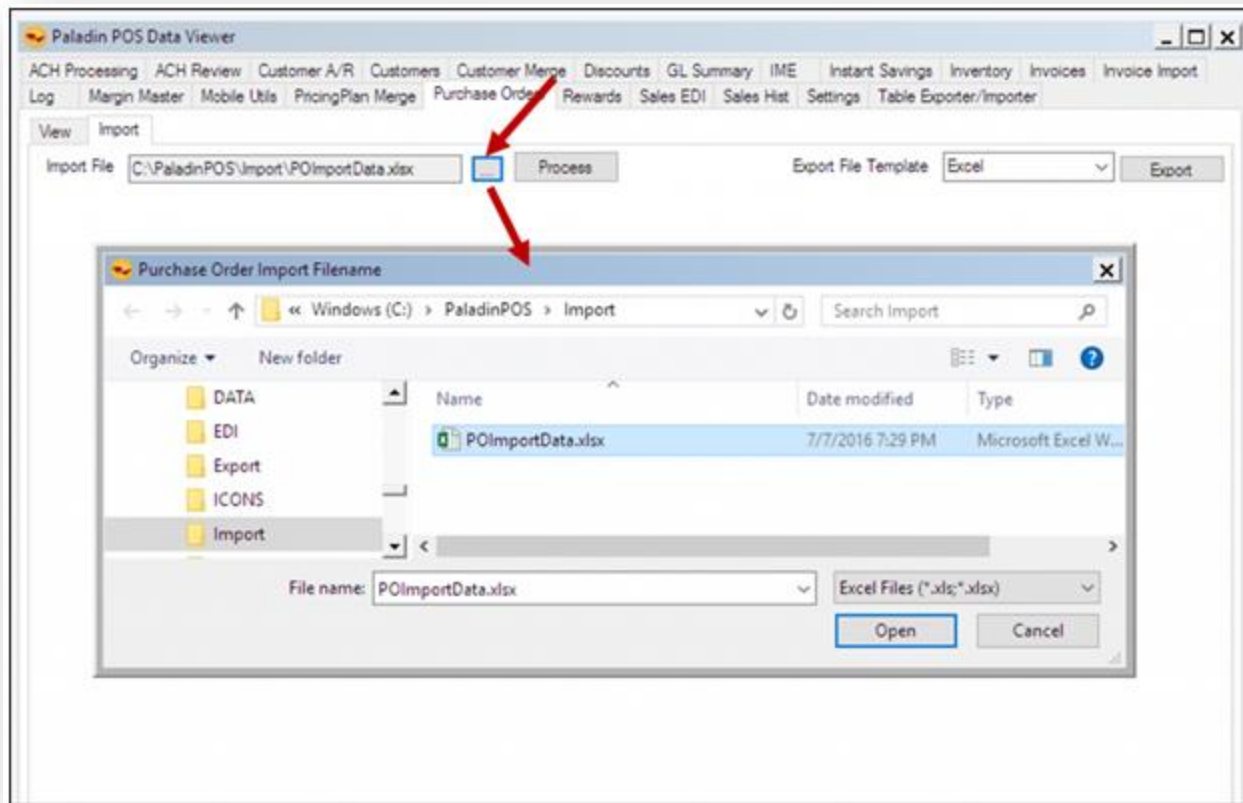
The screenshot shows the 'Paladin POS Data Viewer' application window. The 'Export File Template' dropdown menu is open, showing 'Excel' and 'Tab-delimited' options. A red arrow points from the 'Tab-delimited' option to a Notepad window titled 'TabDelimited\_Template.txt'. The Notepad window displays the following tab-delimited data:

File	Edit	Format	View	Help
ABC	180	25	1.00	
DEF	20	5	2.00	
GHI	15	20	3.00	

The main application window also displays a table with the following data:

	A	B	C	D
1	PART #	SUPPLIER #	QUANTITY	COST
2	ABC	180	25	1.00
3	DEF	20	5	2.00
4	GHI	15	20	3.00
5				
6				

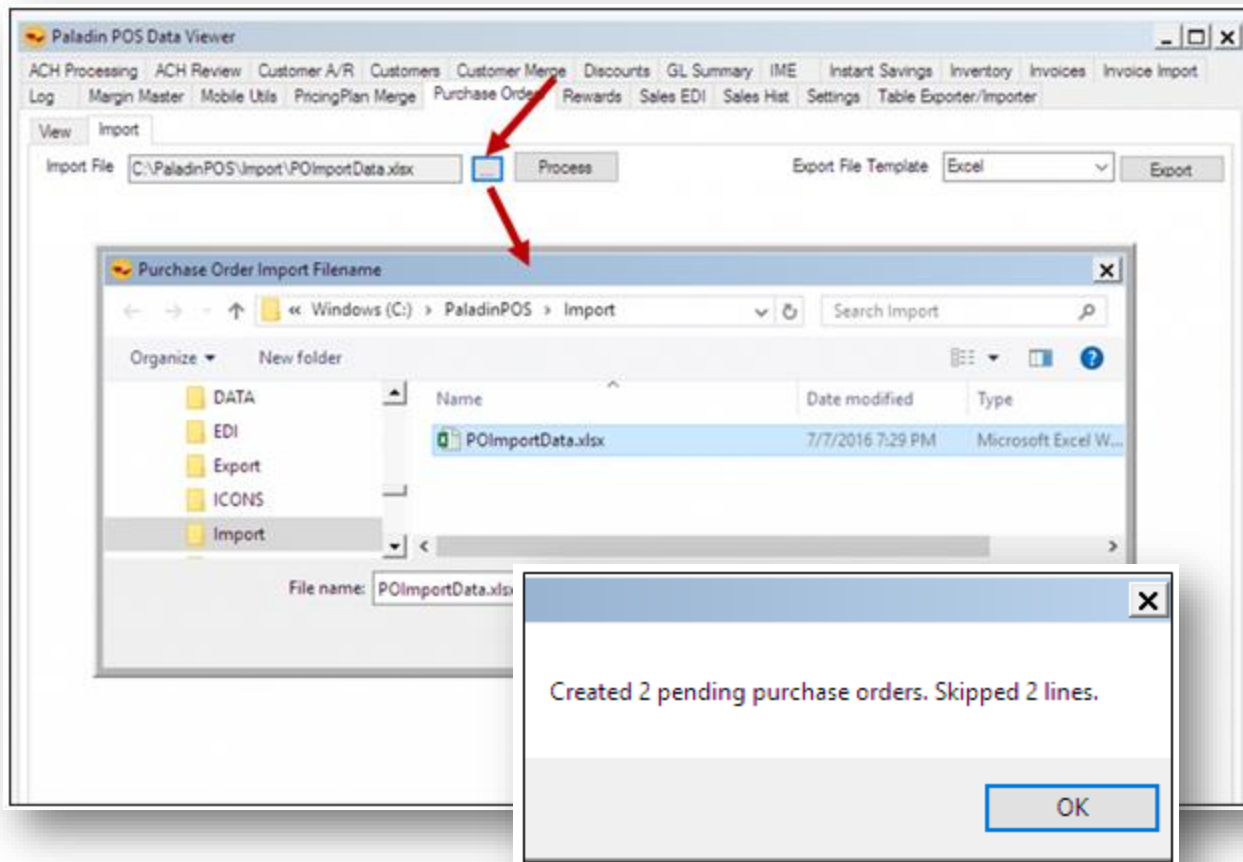
## Using the Purchase Order Importer (cont'd)



4. When the item information file is formatted and completed, press **Save** and **Close** the file.
5. Click the ellipsis [...], select the Excel or Tab delimited file, then click **Process**.

Items in the file will be added to the pending purchase order only when they match active inventory items in Paladin.

## Using the Purchase Order Importer (cont'd)



6. If a match is not found, or the format is not correct, the line is skipped.
7. At the end of the import process, a message opens with the number of pending purchase orders that were created and the number of lines that were skipped.

## Using the Purchase Order Importer (cont'd)

	A	B	C	D	E
1	PART #	SUPPLIER #	QUANTITY	COST	STATUS
2	PART10	10	25	3.49	
3	PART20	10	5	9.79	
4	PART30	21	20	20.99	
5	PART40	500	-10	5.99	Skipped
6	INVALID	10	20	22.50	Skipped

8. When the import process is completed, open the original import file to view a new STATUS column that identifies skipped lines.
9. In the **PO** module, you can view, edit, confirm, and buy (send to the supplier) the pending purchase orders.

**Notes:** For EDI suppliers: Purchased items will be automatically received through the EDI process.

For non-EDI suppliers: On the bottom ribbon of the **PO** module, toggle **F5 Mode PO** to **F5 Mode Receive** to receive the delivered items.

## 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](http://portal.paladinpos.com/webinars).

## Next Webinar:

Save the Date

March 12, 2024

9am PT

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