

EXCELLENCE IN COACHING

Special Orders Made Easy Using the Paladin SO Process

By Charles Owen



Technical Level:

Easy

Intermediate

Advanced



EXCELLENCE IN COACHING:



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What we will be covering



- The two different types of Special Orders
- The configuration settings for setting up Special Orders
- Steps to create a special order invoice for both types of SO's
- How to take a deposit on a Special Order
- How to send and receive Special Orders with your supplier
- Storing and retrieving SO's under Customer Records



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Two Different Types of SO



1. A custom new item, never sold before and not existing in your inventory.
(ex. Custom window, custom door, etc)
2. Items already existing in the active inventory or catalog we may not keep on hand or may not have the quantity desired to meet customer's need.



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To Paladin!



PALADINTM
DATA CORPORATION



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End

Note: For more detailed information, see the following Knowledge Base article: “How to manage Special Orders”

Recording available at:
paladinpointofsale.com/webinars

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