

# purchase order

For convenient, accurate inventory management.

## Creating A Purchase Order

1. From the SalonBiz<sup>®</sup>/SpaBiz<sup>®</sup> menu bar, click on the Inventory icon.
2. Click the New PO button. A purchase order will be displayed on the screen.
3. Click on the drop down box for Vendor and choose a vendor from the list displayed.
4. Click in the Product Name field and type in the name of the product.
5. Select the product from the Select Product field.
6. Enter the quantity you wish to order in the QTY field.
7. Repeat steps 4, 5 and 6 for each product you wish to order. Or you can enter the Vendor number in the Vendor # field and repeat step 6.
8. Click the Set PO to In Process button.
9. Answer Yes to the confirmation screen asking "Are you sure you wish to process the PO?" This will set the PO to an In Process status so that you can receive it when the order arrives.

## Adding Items By Category / Sub-Category

1. From the SalonBiz<sup>®</sup>/SpaBiz<sup>®</sup> menu bar, click on the Inventory icon.
2. Click the New PO button. A purchase order will be displayed on the screen.
3. Click on the drop down box for Vendor and choose a vendor from the list displayed.
4. Click the Add Item button.
5. Choose Category/Sub-Category in the List field.
6. Select the Category from the Category field. Then choose a Sub-Category, all items in this sub-category will be displayed.
7. Or to order all items in a category, in the List field select Category and then select the category you wish to add in the Category field.
8. To select all items, click on click the Check All Products button.
9. To select certain items from the list displayed, click on the item and click the Check Product button or you can simply double click on the items you wish to order, look for the "X" in the far right column.
10. Click the Select All Checked button. This will add the products "checked" to the purchase order.
11. Enter the quantity you wish to order in the QTY field.
12. Click the Set PO to In Process button.
13. Answer Yes to the confirmation screen asking "Are you sure you wish to process the PO?" This will set the PO to an In Process status so that you can receive it when the order arrives.

Qty	Rec	Item Num	Vendor#	Product Name	Type	Margin	Cost	Ext. Cost
1	0	018084807378	018084807	Color Conserve Cond. 1 Liter	Retail	50.00	21.00	21.00
1	0	018084212155	018084212	Euphoric Refill	Retail	37.50	5.99	5.99
1	0	018084720035	018084720	Breath Elixir	Retail	50.00	2.50	2.50
1	0	018084507216	018084507	Paddle Brush	Retail	50.00	9.00	9.00
1	0	018084089026	018084089	Balsa Concealer	Retail	50.00	6.25	6.25
1	0	018084505203	018084505	Lavandou Tea-light	Retail	35.00	3.25	3.25
1	0	018084713143	018084713	Love Body Powder	Retail	50.00	10.00	10.00
1	0	018084081150	018084081	Blisa	Retail	50.00	7.00	7.00

Product Code	Product Name	Cost	Retail	On Hand	On Order	Min	Max	Last Order	Last Sold
01808421179	Euphoric Candle	\$9.60	\$16.00	2	0	1	2	12/28/200	12/22/200
01808421215	Euphoric Refill	\$5.90	\$9.50	0	1	2	2	3/28/2002	12/28/200
01808450533	Euphoric Tea-light	\$3.25	\$5.00	2	0	1	2	6/3/2002	5/31/2002
01808421195	Lavandou Candle	\$9.60	\$16.00	3	0	1	2	3/13/2003	No Date
01808421218	Lavandou Refill	\$5.90	\$9.50	3	0	1	2	3/17/2003	12/28/200
01808450503	Lavandou Tea-light	\$3.25	\$5.00	2	0	1	2	3/17/2003	5/18/2002
01808480720	Love Circle Of Love	\$13.20	\$22.00	2	0	2	3	1/2/2002	5/2/2002
01808480721	Love Tea-light	\$3.50	\$6.50	10	0	6	8	3/20/2003	7/16/2002
01808421190	Madagascar Candle	\$9.60	\$16.00	-2	0	1	2	12/28/200	9/26/2006
01808421217	Madagascar Refill	\$5.90	\$9.50	3	0	1	2	3/17/2003	1/4/2002
01808450534	Madagascar Tea-light	\$3.25	\$5.00	3	0	1	2	3/17/2003	No Date
01808421216	Rainforest Refill	\$5.91	\$9.51	4	0	1	2	3/17/2003	12/28/200

Product Code	Product Name	Cost	Retail	On Hand	On Order	Min	Max	Last Order	Last Sold
01808421179	Euphoric Candle	\$9.60	\$16.00	2	1	1	2	10/2/2006	10/3/2006
01808421215	Euphoric Refill	\$5.90	\$9.50	2	4	1	2	9/29/2006	12/28/200
01808450533	Euphoric Tea-light	\$3.25	\$5.00	2	1	1	2	6/3/2002	5/31/2002
01808421195	Lavandou Candle	\$9.60	\$16.00	3	1	1	2	3/13/2003	No Date
01808421218	Lavandou Refill	\$5.90	\$9.50	3	1	1	2	3/17/2003	12/28/200
01808450503	Lavandou Tea-light	\$3.25	\$5.00	0	1	1	2	3/17/2003	5/18/2002
01808480720	Love Circle Of Love	\$13.20	\$22.00	2	1	2	3	1/2/2002	5/2/2002
01808480721	Love Tea-light	\$3.50	\$6.50	10	1	6	8	3/20/2003	7/16/2002
01808421190	Madagascar Candle	\$9.60	\$16.00	5	2	1	2	9/29/2006	9/26/2006
01808421217	Madagascar Refill	\$5.90	\$9.50	0	1	1	2	3/17/2003	1/4/2002
01808450534	Madagascar Tea-light	\$3.25	\$5.00	3	1	1	2	3/17/2003	No Date
01808421216	Rainforest Refill	\$5.91	\$9.51	5	1	1	2	9/29/2006	12/28/200



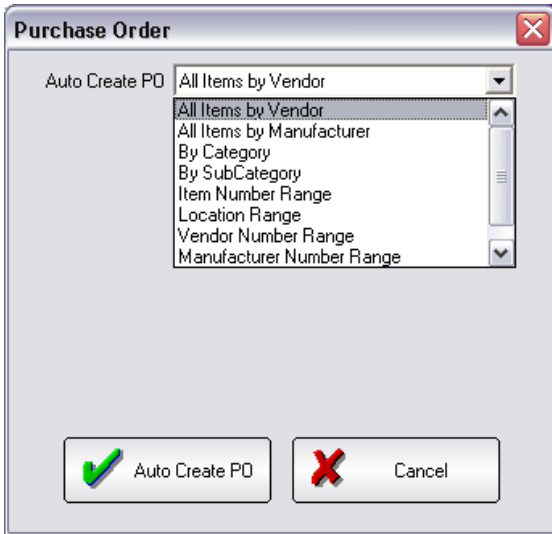
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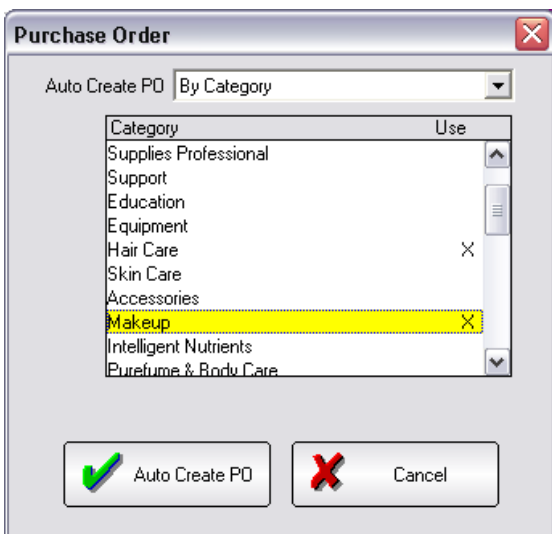
# purchase order

Using the Auto Create feature.



## Auto Create By Vendor

1. From the SalonBiz®/SpaBiz® menu bar, click on the Inventory icon.
2. Click the New PO button. A purchase order will be displayed on the screen.
3. Click on the drop down box for Vendor and choose a vendor from the list displayed.
4. Click the Auto Create button.
5. From the drop down menu, select an auto create reason for example All Items by Vendor.
6. Click on the Auto Create PO button.
7. The products that are below your pre-set minimum will be displayed on the purchase order to get you to your pre-set maximum for the vendor selected on the purchase order.
8. Review the purchase order and alter quantities and products if necessary.
9. Click The Set PO to In Process button.
10. Answer Yes to the confirmation screen asking “Are you sure you wish to process the PO?” This will set the PO to an In Process status so that you can receive it when the order arrives.



## Auto Create By Category

1. From the SalonBiz®/SpaBiz® menu bar, click on the Inventory icon.
2. Click the New PO button. A purchase order will be displayed on the screen.
3. Click on the drop down box for Vendor and choose a vendor from the list displayed.
4. Click the Auto Create button.
5. From the drop down menu, select an auto create reason for example select By Category.
6. Click once on each category you wish to order. Make sure the categories you want on your purchase order have an “X” in the Use column.
7. Click on the Auto Create PO button.
8. The products in the categories selected will be displayed on the purchase order.
9. Review the purchase order and alter quantities and products if necessary.
10. Click The Set PO to In Process button.
11. Answer Yes to the confirmation screen asking “Are you sure you wish to process the PO?” This will set the PO to an In Process status so that you can receive it when the order arrives.



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# Frequently Asked Questions

## **What if I get an error message about vendor setup?**

The error message “Vendor is not setup to supply this product. Do you wish to continue?” means; either that you are trying to order the incorrect items for the vendor selected or that those products are not linked to the vendor under Inventory in your Blueprints.

## **What if I have my inventory levels set (min/max)?**

You would choose to auto create a purchase order based on your min/max settings for all items in the database for a particular vendor. In the Auto Create PO field, choose All Items By Vendor.

## **What if I do not have any inventory levels set (min/max)?**

If you would like to create a PO without having to enter in individual products line by line simply click on the Add Item button and choose All Items in your database, Category/Sub-Category or by Manufacturer.

## **Can I automatically create a PO based on sales?**

Yes. In the Auto Create PO drop down menu select Sales by date range. Then enter the desired range and then click the Auto Create PO button.

## **What if I make a mistake?**

An open Purchase Order can always be altered; products can be both added to or taken away and product quantities can be changed. Once a Purchase Order is set to In Process status the best way to correct an error is to Void it and create a new PO.

## **Why are some product lines red?**

It is the result of a default question previously set in your Inventory under Blueprints. It is a warning that you are purchasing a product below a certain margin. Depending on your situation you may choose to change the margin or alter the selling price to meet your margin.

## **Customer Support 888.809.2802**

Our Customer Support team is ready to assist you.

