

# receiving orders

For convenient, accurate inventory management.

## Receiving Orders

1. From the SalonBiz®/SpaBiz® menu bar, click on the Inventory icon.
2. Choose Purchase Order in the View By field.
3. In the Filter By field choose In Process.
4. Click on the purchase order that you wish to receive, and then click the New RO from PO button.
5. Receive the order by clicking in the Rec column and entering the amount of items you received. Press the Enter key after each items received quantity is entered.
6. Verify the cost of each item and make sure that the subtotals on the invoice match the subtotal in SalonBiz®/SpaBiz®. If the cost is different, edit the cost by clicking in the Cost column and typing the new price.
7. If you received products that are not on your purchase order, add the items to the receiving order by clicking the Add Item button.
8. Enter the tax and freight charges or any discounts in the corresponding fields.
9. Click the Process PO and RO button.
10. Record the RO number, the date received and your initials on the top of the invoice. File the Invoices.

## Receiving a Partial Order

1. Follow steps 1-8 above.
2. Click the Process RO Only button. This allows the PO to remain open until all products are received.
3. When the remainder of your order arrives follow the steps 1-10 above to close the PO.

## Receiving a Pre- Order

1. From the Inventory icon click on the New RO No PO button.
2. Select the vendor from the drop down list in the Vendor field.
3. Use the Add item button to create the receiving order.
4. Verify cost and quantity on all items received.
5. Click the Process button.

ItemNum	Vendor#	Product Name	POQty	PORec	Rec	BO	Type	Margin	Cost	Ext. Cost
018084080412	0180840804	Angle Brush	1	0	1		Retail	50.00	5.25	5.25
018084080405	0180840804	Blush Brush	1	0	1		Retail	50.00	12.50	12.50
018084211793	0180842117	Euphoric Candle	1	0	1		Retail	40.00	9.60	9.60
018084080375	0180840803	Eyeliner Brush	1	0	1		Retail	50.00	5.00	5.00
018084080351	0180840803	Large Shadow Brush	1	0	1		Retail	50.00	7.00	7.00
018084080368	0180840803	Lip & Concealer Brush	1	0	1		Retail	50.00	7.75	7.75
018084080399	0180840803	Medium Shadow Brush	1	0	1		Retail	50.00	6.50	6.50
018084080443	0180840804	Powder Brush	1	0	1		Retail	50.00	13.75	13.75

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Are you sure you wish to process the RO? This will add the item(s) you received to the Inventory!

Yes No

ItemNum	Vendor#	Product Name	Rec	Type	Margin	Cost	Ext. Cost
018084080412	0180840804	Angle Brush	1	Retail	50.00	5.25	5.25
018084080405	0180840804	Blush Brush	1	Retail	50.00	12.50	12.50
018084080429	0180840804	Brow & Lash Brush	1	Retail	50.00	4.00	4.00
018084080375	0180840803	Eyeliner Brush	1	Retail	50.00	5.00	5.00
018084080351	0180840803	Large Shadow Brush	1	Retail	50.00	7.00	7.00
018084080368	0180840803	Lip & Concealer Brush	1	Retail	50.00	7.75	7.75
018084080399	0180840803	Medium Shadow Brush	1	Retail	50.00	6.50	6.50
018084080443	0180840804	Powder Brush	1	Retail	50.00	13.75	13.75



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# Frequently Asked Questions

## **When should I create a receiving order?**

You should check your order in and receive it the day that it is delivered to your location.

## **What should I do if I am in the middle of a RO and I need to make an appointment?**

Receiving orders act much like a sales ticket. Once you have created it you can feel free to leave it to make an appointment and return to it. After clicking the Inventory icon, choose Receiving Order in the View By field. Then choose Open in the Filter By field. You can double click on the open receiving order that matches the PO you created.

## **Should I receive damaged items?**

No. You should never receive damaged items into your inventory.

## **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 receiving 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.

## **What if I have created duplicate receiving orders?**

From the View List field select Receiving Orders then in the Filter by field select Open. Continue receiving items on one and simply void the duplicate.

## **What if I get an error message regarding negative on hand quantities?**

Carefully read the pop up message and answer accordingly. There is no need to create a separate inventory adjustment. Answering Yes to the message will automatically create an adjustment for you.

## **Customer Support 888.809.2802**

Our Customer Support team is ready to assist you.

