

# purchase order

Simplify your ordering process by using this convenient, accurate inventory management tool.

## Creating a Purchase Order

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 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.

Qty	Vendor #	Product Name	Type	Margin	Cost	Est. Cost	Retail
1	0190842345	New Product	Retail	60.00	10.00	10.00	10.00
1	0190841652	Vitamin Hydrating Shampoo 5oz	Retail	100.00	6.00	6.00	6.00
1	0190841317	Salt Scrub 10oz	Retail	30.00	10.00	10.00	10.00
1	0190841784	Salt Scrub 16oz	Retail	100.00	6.00	6.00	6.00
1	01908419426	Toumoline Charged Hydrating Creme 1.7oz	Retail	100.00	6.00	6.00	6.00
1	01908419778	Scalping India Therapy Wash	Retail	50.00	13.00	13.00	13.00
1	01908418957	Hand Relief 4.2oz	Retail	61.11	7.00	7.00	7.00
1	01908424277	Only Acne Infusion 1.0 oz	Retail	50.00	10.00	10.00	10.00
1	01908411152	Sensitive Infusion 1.0oz	Retail	50.00	10.00	10.00	10.00
1	0190841719	Rabona Candle	Retail	40.00	10.00	10.00	10.00

## Adding Items by Category / Sub-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 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. 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.
7. To select all items, click on click the Check All Products button.
8. 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.
9. Click the Select All Checked button. This will add the products “checked” to the purchase order.
10. Enter the quantity you wish to order in the QTY field.
11. Click the Set PO to In Process button.
12. 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.

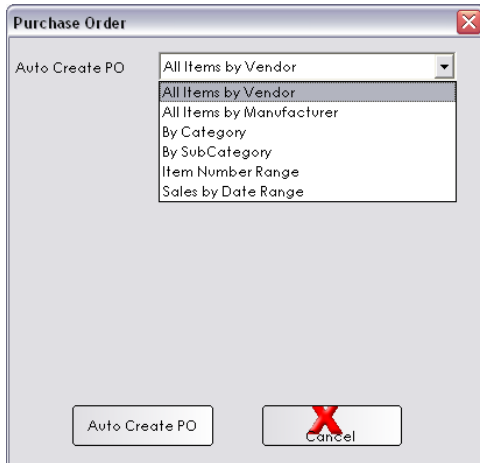
Product	Product Name	Cost	Retail	On Hand	On Order	Min	Max	Last Order	Last Sold	X
0190842117	Euphoric Candle	\$10.80	\$18.00	10	0	0	0	0	3/14/2009	
0190842118	Rabona Candle	\$10.80	\$18.00	12	0	0	0	0		
0190842119	Madagascar Candle	\$10.80	\$18.00	11	0	0	0	0		
0190842119	Lavender Candle	\$10.80	\$18.00	10	0	0	0	0		
019084372	Shampoo Candle	\$0.00	\$28.00	2	0	0	0	0		
019084297	Caribbean Therapy ...	\$0.00	\$28.00	0	0	0	0	0		
019084384	Earl Month Candle	\$5.00	\$10.00	0	0	0	0	0	2/25/2009	

Product	Product Name	Cost	Retail	On Hand	On Order	Min	Max	Last Order	Last Sold	X
019081818	Remota 5ml	\$12.00	\$5.50	0	0	0	0	0		X
0190842923	Pure Abundance Vol...	\$0.00	\$39.00	0	0	0	0	0		X
019084342	Self Control 30oz 75g	\$9.25	\$16.50	0	0	0	0	0		X
019084342	Prominent 7oz	\$0.00	\$13.00	0	0	0	0	0		X
019084340	Sap Moss Shampoo 1...	\$6.00	\$12.00	0	0	0	0	0		X
019084348	Voluming Tonic 3.7oz	\$6.50	\$13.00	0	0	0	0	0		X
019084349	Scalp Remedy 100ml	\$6.00	\$12.00	0	0	0	0	0		X
019084320	Cherry Almond Bark 2...	\$19.00	\$20.00	0	0	0	0	0		X
019084321	Cherry Almond Bark 1...	\$16.00	\$32.00	0	0	0	0	0		X



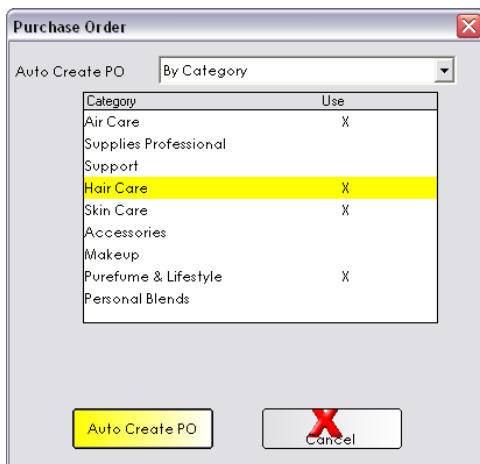
# auto create

Save time and create purchase orders 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.



# 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.

