



## Purchase Orders and Receiving v. 16.1

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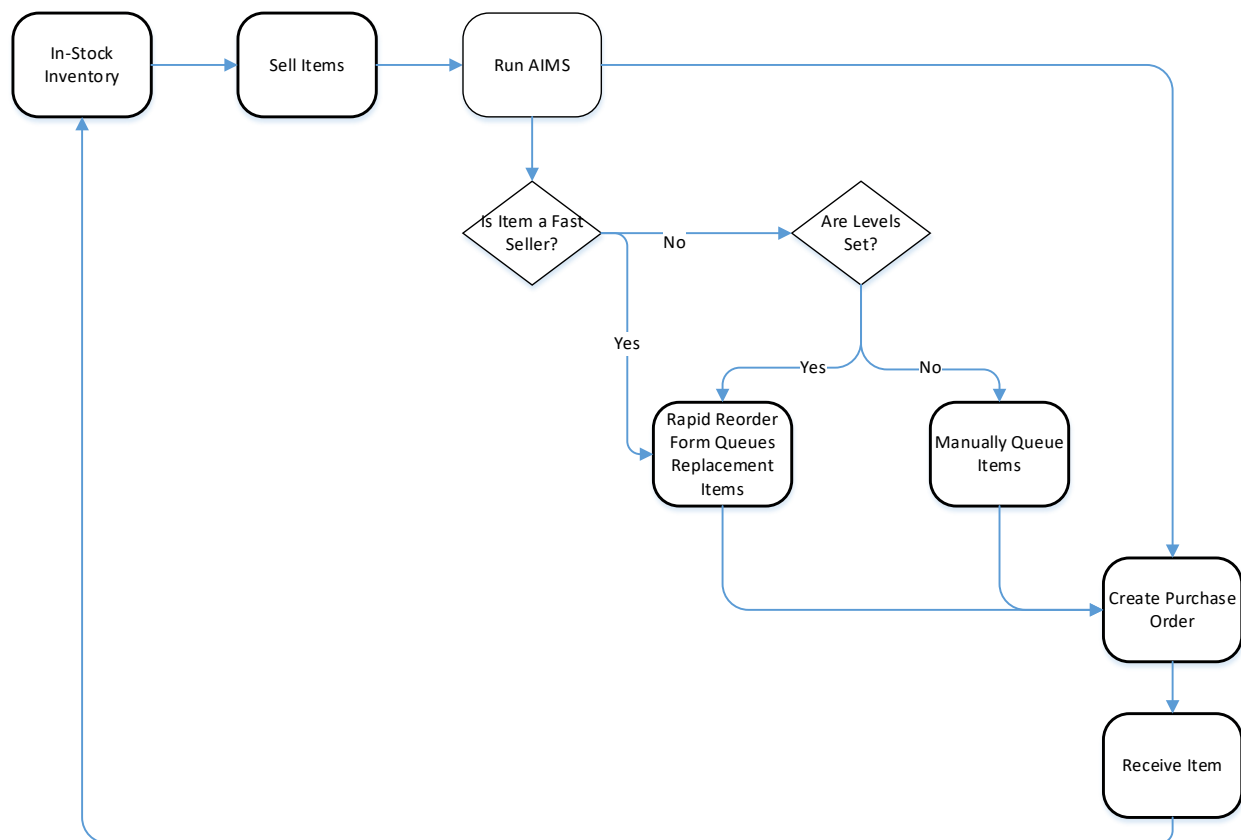
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## Introduction

Inventory management is the single biggest factor in the success of a retail business. Your goal is to sell as much product at the highest price from the smallest investment. To do so, you must vigilantly monitor, measure, and adjust your activities to make the most of your inventory with educated decisions. The Edge's reporting features will provide that data. The other side is to act on that information.

A large part of inventory management offered by The Edge consists of a number of features that work together: item records, the AIMS feature, the Levels feature, the Rapid Reorder feature, special orders, purchase orders, and item intake. If you use the item management features discussed here along with the many reporting features, The Edge will help you achieve your goals.

Items come in and you sell them. Based on sales history and trends, The Edge's Levels and Rapid Reorder features work together to queue good sellers for replacement. They can also be manually queued. Queuing is the interim step between identifying a need for an item and creating the purchase order. Then the Purchase Order module makes it easy to retrieve queued items and order them. Then the record is readily available when the item is received.



This document covers purchase orders and describes how to order items queued from special orders, item records, or the Rapid Reorder feature (see the section in The Edge User Guide entitled Ordering Reports) and receive them into inventory.

## System Options

There are a number of system options pertaining to purchase orders and receiving.

<b>Allow Zero Costs</b>	Whether to allow an item's cost to be set at zero.
<b>Validate Retail Greater Than Cost</b>	Whether to validate that the item's retail price is greater than its cost.
<b>Enable Auto Pricing</b>	If set to <code>True</code> , on receive invoice, if the cost is changed after a line has been added, the system will prompt the user to set price fields based on auto pricing.
<b>Round All Pricing to the Dollar</b>	If set to <code>True</code> , The Edge will round pricing to the nearest dollar.
<b>Use Replacement Cost for Auto Pricing</b>	If set to <code>True</code> , The Edge will use re-cost for Auto-Markup.
<b>Open Previous Non-Submitted Purchase Orders</b>	When starting a new purchase order, if the selected vendor already has an open purchase order, open that one for editing instead of creating a new one.
<b>Purchase Order BCC Email Address</b>	Email address(es) to use by default in the BCC email field in <b>Purchase Order Settings</b> . If there is more than one, separate them by semi-colons (;).
<b>Purchase Order Email Address</b>	The Edge will use the store email address from your license file unless otherwise specified.
<b>Purchase Order Most Recent Item Cost</b>	If set to <code>True</code> , The Edge will use the most recent cost for the vendor style in the purchase order.
<b>Save Most Recent Purchase Order Settings</b>	If set to <code>True</code> , The Edge will save settings in <b>Purchase Order Settings</b> for future purchase orders.
<b>Show Images by Default on Purchase Orders</b>	If set to <code>True</code> , item images will be shown on the <b>Purchase Order</b> window.
<b>Show Images by Default on Receive Invoice</b>	If set to <code>True</code> , item images will be shown in the <b>Receive Invoice</b> window.

## Purchase Orders

The Edge features a purchase order system designed to make ordering and receiving inventory a seamless and simple process. It allows you to order inventory for stock needs and to fulfill special orders for customers.

### Adding a Purchase Order

To create a new purchase order:

1. Select **Inventory ► P/O ► Add**. The **Purchase Order Add** window will appear.

Fields and options in the **Purchase Order Add** window include:

<b>Vendor</b>	The vendor to whom this purchase order will be submitted.
<b>Show vendors with queued orders only</b>	Enabled by default, populates the <b>Vendor</b> drop-down list with vendors who have open purchase orders.
<b>Edit Vendor</b>	Returns the vendor record so you can review details or make changes. The changes will be reflected immediately.
<b>Show Images</b>	Enables the image column on the window. It does not affect images on the purchase order when printed or emailed.
<b>PO #</b>	The Edge-generated purchase order number; it will be created when the purchase order is saved.
<b>Ship Via</b>	The shipping method or carrier. Shipping methods can be managed from <b>Administrative ► Lists</b> . The list name is Shipping Methods.
<b>ETA</b>	The estimated date of arrival based on typical vendor delivery time. It cannot be earlier than the current date and cannot be changed after the purchase order is submitted.
<b>Date Ordered</b>	Shows the date the order was submitted. This will not appear until the purchase order has been submitted.
<b>Note</b>	Allows you to enter notes about the order.
<b>Add Line</b>	Allows you to add a line item to the purchase order. It is disabled after the purchase order is submitted.
<b>Delete Line</b>	Allows you to delete a line item from the purchase order. If the item came from the queued item list, it will be returned there.

2. Select the vendor for this order. If there are items on order, the **Retrieve Queued Items and Special Orders** window will appear. Also, if you choose a vendor for whom a purchase order exists, you will be prompted to open that purchase order and add items to it.

Select	Order	Vendor	Vendor Style	Description
<input type="checkbox"/>	1	EBI EBI Vendor	ICE128W	1.28ct tdw 14kwtg Ideal Cut Diamond Stud Earrings of F-H/SI2-I1
<input type="checkbox"/>	Q	5/3/2015	Style Note	
<input type="checkbox"/>	1	EBI EBI Vendor	ICE33W	0.33ct tdw Ideal Cut Diamond Stud Earrings w/Diamonds of G-I/I1
<input type="checkbox"/>	Q	5/3/2015	Style Note	
<input type="checkbox"/>	1	EBI EBI Vendor	12-206150	0.81 Carat Loose Ideal Cut Diamond of F/SI2
<input type="checkbox"/>	Q	5/3/2015	Style Note	
<input type="checkbox"/>	1	EBI EBI Vendor	12-207219	0.80 Carat Loose Ideal Cut Diamond of I/SI1
<input type="checkbox"/>	Q	5/3/2015	Style Note	

Check/Uncheck All    Show Images     

For the purposes of the **Retrieve Queued** window and the **Purchase Order** window, line items will be color-coded as follows:

Yellow	Queued items
Purple	Special order items
Dark Red	Marked to be cancelled
Red	Cancelled
Light Yellow	Other
Blue	Selected
Light blue	Hovering

3. Select the items to be added to the purchase order. From here you can only change quantity and style note.
4. Select **OK**. The **Purchase Order Add** window will be populated with the items.

**Purchase Order Add**

Vendor: **EBI** EBI Vendor has 4 item(s).  
 Show vendors with queued orders only.  
 Edit Vendor      **Retrieves Queued**

PO #: \_\_\_\_\_  
 Ship Via: \_\_\_\_\_  
 ETA: 1/22/2016  
 Note: \_\_\_\_\_

Show Images

Source	Qty	Style Code	Style Note	Status	ETA	Description	Category	Cost
Q	1	ICE128W		New	1/22/2016 15	1.28ct tdw 14kwn Ideal Cut	150 Diamond Earrings	\$1,939.00
Q	1	ICE33W		New	1/22/2016 15	0.33ct tdw Ideal Cut Diamond	150 Diamond Earrings	\$297.00
Q	1	12-206150		New	1/22/2016 15	0.81 Carat Loose Ideal Cut	190 Diamonds - Loose	\$2,997.00
Q	1	12-207219		New	1/22/2016 15	0.80 Carat Loose Ideal Cut	190 Diamonds - Loose	\$2,600.00

Add Line      Delete Line

Estimated Total: \$7,833.00

<<   <   New   >   >>   Save & New   PO Settings   Print   Submit & Email   Submit & Print   Revert   OK / Save & Close   Cancel

5. Use **Retrieve Queued** to go back to the **Retrieve Queued** window and select more items.
6. Select a shipping method from the **Ship via** drop-down menu.
7. Enter notes in the **Notes** field to place a note on the order (optional).
8. Enter an estimated time of arrival in the **ETA** field. This can be set for the entire purchase order or for each item line.
9. To add more items, select **Add Line**. If this order is for a style that has been in stock before, select the vendor style from the drop-down menu. If this order is for a new style, type in its vendor style number and basic details. As a shortcut, you can scan item tags and special order envelopes to quickly create line items.
10. Verify and correct data in each item line:
  - a. Image
  - b. Source
  - c. Quantity (must be greater than 0)
  - d. Style Code (required). You may be prompted to copy details from a previous item.
  - e. Status
  - f. ETA (must be later than the current date)
  - g. Description (required)
  - h. Category (required)
  - i. Cost per item (required).
11. Choose a save option:
  - a. **Print Preview**: Allows you to print a purchase order. This does not submit the purchase order. To do so, use **Submit & Print**.
  - b. **Submit & Email**: Saves the purchase order in The Edge as ordered and sends the purchase order by email to the vendor.
  - c. **Submit & Print**: Saves the purchase order in The Edge as ordered and sends the purchase order to the printer so you can fax or mail it to the vendor.
  - d. **OK/Save & Close**: Saves the purchase order to be worked on later. This does not submit the purchase order to the vendor or record it as such in The Edge.

## Purchase Order Settings

Found in both new and existing purchase order records, the **Purchase Order Settings** option allows you to choose information that should appear when printing a purchase order. To work with **Purchase Order Settings**:

1. From the purchase order record, select **PO Settings**. The **Purchase Order Settings** window will appear with the **Shipping Info** tab open.

The screenshot shows the 'Purchase Order Settings' window with the 'Shipping Info' tab selected. The window contains the following fields:

Field	Value
Store	HQ
Store Name	EDGE Tech Shop
Address	3 Corporate Drive
Address 2	
City	Shelton
State	CT
ZIP Code	06484
Phone Number	(877) 844-0002

A 'Done' button is located at the bottom right of the window.

The **Shipping** tab allows you to change the store to which the order should be sent. Fields are self-explanatory and are populated from your Edge license file.

2. Make changes as needed and select the **Email** tab.

The screenshot shows the 'Purchase Order Settings' window with the 'Email' tab selected. The window contains the following fields:

Field	Value
Store Email Address	sheila@abbottshapiro.com
To Email Address	Sales@EBI.com
From Email Address	sheila@abbottshapiro.com
CC Email Address	
BCC Email Address	

Below the email fields, there is a note: "To use multiple email addresses use a ';' to separate them." and two checkboxes: "Delivery Receipt" and "Read Receipt", both of which are currently unchecked. A 'Done' button is located at the bottom right of the window.

Fields in the **Email** tab are treated as follows:

- |                            |   |
|----------------------------|---|
| <b>Store Email Address</b> | Obtained from your Edge license file. This cannot be changed.   |
| <b>To Email Address</b>    | Obtained from the purchase order vendor email field. If it is not on the purchase order, it will be pulled from the vendor record. This is needed to submit by email. |
| <b>From Email Address</b>  | This is the store email address unless otherwise specified in the System Option <b>Purchase Order Email Address</b> .   |

- CC Email Address** Allows you to add a carbon copy email to a third party. To use more than one, separate them with a semi-colon (;). Default addresses can be set in System Options.
- BCC Email Address** Loaded from the System Option **Purchase Order BCC Email Address**. To use more than one, separate them with a semi-colon (;). It can be changed here. Default addresses can be set in System Options.
- Delivery Receipt** If the recipient's email system supports it, this will generate a receipt of delivery. This is saved to the Most Recent Settings.
- Read Receipt** If the recipient's email system supports it, this will generate a read receipt. This is saved to the Most Recent Settings.

3. Make changes as needed in the **Email** tab and select the **Printing Options** tab.

The **Printing Options** tab allows you to decide what should appear on the actual purchase order in either email or print format. These options are saved for future use. Items you can include are:

- **Print Images**
- **Print Vendor Account Number**
- **Print Vendor Phone Number**
- **Print Vendor Fax Number**
- **Print Vendor Email address**
- **Print Retailer Phone Number.**

4. Complete these options and select **Done**.

## Finding and Editing a Purchase Order

To avoid confusion with your vendors, care should be taken in editing a submitted purchase order. We do not recommend resubmitting purchase orders except to ensure The Edge is not expecting an item to be entered into inventory. To find, view, or edit an existing purchase order:

1. Select **Inventory ► P/O ► Find**.



Fields and option in the **Purchase Order Find** window include:

<b>PO Number</b>	Returns POs numbered in this range.
<b>Vendor</b>	Returns POs for the specified vendor.
<b>Date Ordered</b>	Returns POs with a submission date in the specified date range.
<b>ETA</b>	Returns POs with the specified ETA date range.
<b>Purchase Order Status</b>	Returns POs with statuses as selected below.
<b>Entered</b>	P/O created but not ordered.
<b>Ordered</b>	P/O ordered but none of ordered quantity received.
<b>Partially Filled</b>	P/O ordered and some ordered quantity received.
<b>Filled</b>	P/O ordered and all ordered quantity received or cancelled.
<b>Cancelled</b>	Order on the P/O was placed, but then cancelled.

- Enter criteria to find a specific purchase order and select **OK**. The **Purchase Order List** will appear.

Store #	PO Key	PO #	Vendor	Date Ordered	Ordered By	ETA	Status	Submitted As	Qty Ordered	Qty Received	Qty Canceled
1	2	001-00002	AC	10/4/2014	Owner, Tom	4/25/2015	Ordered	Printed Document	14	0	1
1	3	001-00003	AK	10/4/2014	Sam, Brad	10/11/2014	Ordered	Printed Document	1	0	0
1	4	001-00004	DI	10/4/2014	Sam, Brad	10/11/2014	Partial	Printed Document	33	16	0
1	6	001-00006	OA	10/4/2014	Sam, Brad	10/11/2014	Ordered	Printed Document	61	0	0

Purchase Orders 12 records matching

PO #	Vendor	Date Ordered	Ordered By	ETA	Status	Submitted As	Qty Ordered / Entered	Qty Received	Qty Canceled	Note	Ship Via
001-00001	AB		Sam, Brad	11/16/2015	Entered		1	0	0		
001-00002	AC	11/9/2015	Sam, Brad	11/16/2015	Ordered	Printed Document	6	0	0		
001-00003	AK	11/9/2015	Sam, Brad	11/16/2015	Ordered	Printed Document	1	0	0		
001-00005	BB		Sam, Brad	11/16/2015	Entered		1	0	0		
001-00010	BS	7/19/2016	Owner, Tom	7/26/2016	Partial	Printed Document	4	2	0		
001-00009	BS	7/19/2016	Owner, Tom	7/26/2016	Filled	Printed Document	2	2	0		
001-00004	DI	11/9/2015	Sam, Brad	11/16/2015	Partial	Printed Document	33	16	0		
001-00008	HP		Owner, Tom	7/26/2016	Entered		4	0	0		
001-00011	MK	7/26/2016	Owner, Tom	8/2/2016	Ordered	Printed Document	4	0	0		Fed Ex
001-00012	MK		Owner, Tom	8/4/2016	Entered		1	0	0		
001-00006	OA	11/9/2015	Sam, Brad	11/16/2015	Ordered	Printed Document	61	0	0		
001-00007	TAC	11/9/2015	Sam, Brad	11/16/2015	Filled	Printed Document	21	21	0		

Edit... Add... Cancel PO Print List... Cancel

3. Select the desired purchase order and select **Edit**. The **Purchase Order Edit** window will appear.

Purchase Order Edit: 001-00005

Vendor: **BB** BB Vendor

PO #: 001-00005

Ship Via: [Dropdown]

ETA: 10/11/2014

Note: [Text Field]

Show Images

Source	Qty	Style Code	Style Note	Status	ETA	Description	Category	Cost
Q	1	CH507A		Entered	10/11/2014	0.62ct tdw 14kwn Brown &	160 Diamond Pendants	\$446.75

Add Line Cancel Line

Include Canceled Items

Include Received Items

Estimated Total: \$446.75

<< < 5 of 7 > >> Save & New PO Settings Print Submit & Email Submit & Print Revert OK / Save & Close Cancel

Fields and options in the **Purchase Order Edit** window include:

<b>Vendor</b>	Allows you to select a vendor.
<b>Edit Vendor</b>	Returns the vendor record so you can view details or make changes. These changes will be applied to the purchase order.
<b>PO Submitted As</b>	If submitted, the method by which the purchase order was submitted.
<b>PO #</b>	The Edge-assigned purchase order number.
<b>Ship Via</b>	The shipping method or carrier.

<b>ETA</b>	The estimated time of the order's arrival.
<b>Date Ordered</b>	If submitted, the date the order was submitted.
<b>Note</b>	For notes about the purchase order in general.
<b>Show Images</b>	Allows you to see item images. This is only on the window; it doesn't not affect the actual purchase order when printed or emailed.
<b>Add Line</b>	If not submitted, you can add items to the order.
<b>Cancel Line</b>	<p>Cancels the item from the purchase order and marks the line item cancelled. This option has some contingencies:</p> <ul style="list-style-type: none"> <li>• If a selected line has not been saved, it will delete the selected line from the purchase order. If the line came from the <b>Retrieve Queued</b> window, it will return it to the queue for fulfillment later.</li> <li>• If a selected line has been saved, <b>Cancel Line</b> will cancel the selected line on the order. It will only appear if you have <b>Show Cancelled</b> checked. The line will turn dark red and will be cancelled when the purchase order is saved.</li> <li>• If a selected line represents ordered items that are partially received, the button will cancel the portion of the order that has not been received.</li> <li>• You cannot cancel fulfilled lines that have been fully received.</li> </ul>
<b>Include Cancelled Items</b>	Allows you to show items that have been cancelled from this purchase order. This option is only visible if there are line items on the purchase order.
<b>Include Received Items</b>	Allows you to show items that have already been received and added.
<b>Estimated Total</b>	Contains a total of the cost of all items in the purchase order. It is the quantity times the cost.
<b>PO Settings</b>	Opens the <b>Purchase Order</b> settings window described in the section entitled Purchase Order Settings.
<b>Re-Submit Email</b>	Allows you to re-submit this purchase order by email.
<b>Re-Submit &amp; Print</b>	Allows you to re-submit this purchase order by mail.

4. As long as the purchase order has not been submitted, you can make changes to fields, except style code, as described in the section entitled Adding a Purchase Order. You can change quantity, category and cost. After it is ordered, everything but cost is fixed.

## Receive Invoice from Purchase Order Window

Styles that are placed on purchase orders and marked ordered will be automatically available to be received using the **Receive Invoice** feature. Those who manage purchase orders regularly may find it more convenient to work from this area. For more information, see the section entitled Add Item from Invoice.

## Finding Orders

The **Finding Orders** function allows you to find orders by item rather than by invoice or purchase order. To find an ordered item:

1. Go to **Inventory ► P/O ► Find Orders**. The **Find Items on Order** window will appear.

Fields and options in the **Find Items on Order** window include:

<b>PO #</b>	Returns orders contained on purchase orders numbered in the specified range.
<b>Vendors</b>	Returns orders with the specified vendors.
<b>Categories</b>	Returns orders in the specified categories.
<b>Styles</b>	Returned orders with the specified styles.
<b>Status</b>	
<b>Queued Items</b>	Returns orders that have the status of Queued.
<b>Entered Items</b>	Returns orders that have the status of Entered.
<b>On Order</b>	Returns orders that have the status of On Order.
<b>Canceled</b>	Returns orders that have the status of Cancelled.
<b>Item Type</b>	
<b>Special Orders</b>	Returned orders that are a result of a special order.
<b>Stock</b>	Returned orders contain stock items.

2. Complete the search parameters and select **OK**. The results will appear in the **Items on Order** window.
3. To work with an item record, select the item and select **Edit**.
4. To cancel the item from an order, select the item and select **Cancel Item**.

## Add Item from Invoice

The **Receive Invoice** feature allows you to enter a number of items into inventory at once based on the invoice that accompanies the shipment. Though it is designed to function with purchase orders, it can be used by itself. For working with receipt of special orders, matching the incoming item with the order is automatic. To receive items from invoice:

1. Select **Inventory ► Items ► Add ► From Invoice** (or **P/O ► Rcv Invoice**). The **Select a Vendor** window will appear.

Fields and options in the **Select a Vendor** window include:

- Vendor drop-down menu** Used to select the vendor from whom the shipment came.
- Show vendors with items on order only** If this is enabled, The Edge populates the **Vendor** drop-down list with vendors who have items on order.
- Show vendors with Special Orders not on a PO** If this is enabled, The Edge populates the **Vendor** drop-down list with vendors who have special orders not created in a purchase order.

2. Enter the vendor ID or select it from the drop-down menu and select **OK**. The **Items Ordered** window will appear.

Source	Vendor Style	Style Note	# Ordered	PO # / Customer	Description
SO	01/231		1	001-00009 Mike Abbott	3MM 14K GOLD PEARL HEART EARRINGS
	01/042		1	001-00009	.02TDW 14K GOLD 5MM PEARL AND DIAMOND EARRINGS

The **Ordered Items** window contains a list of items ordered from this vendor. They may or may not be included in the shipment you are receiving. Information shown on the **Items Ordered** window include:

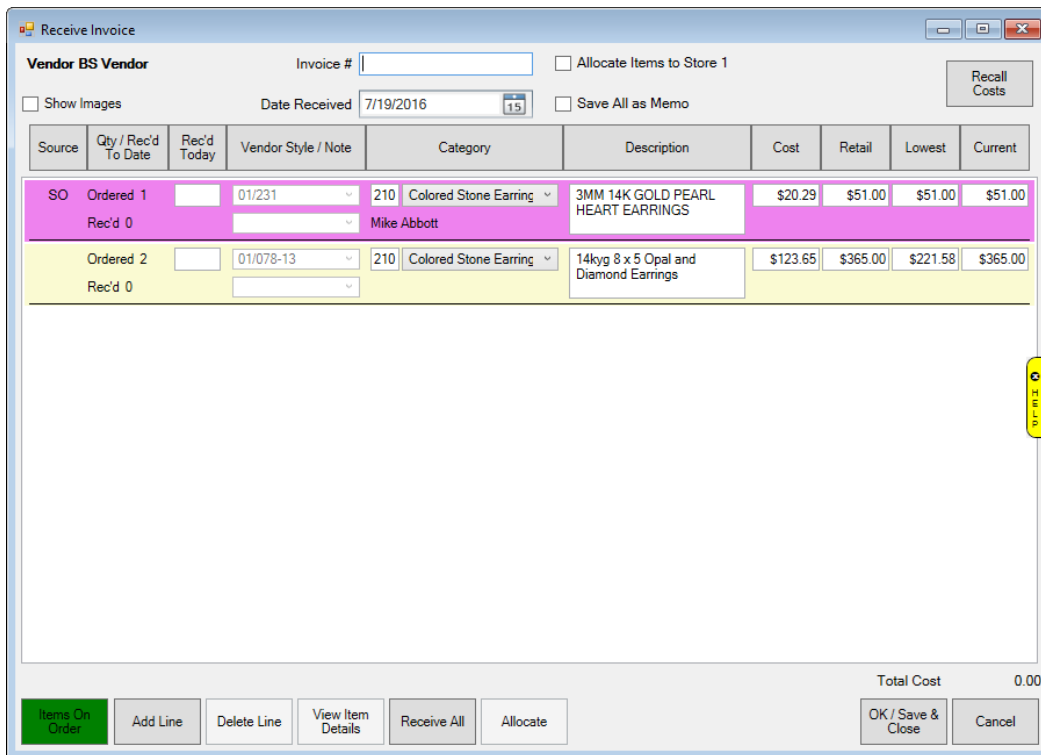
- Source** The initial source of the ordered item:  
**Q:** Queued from the item record or Rapid Reorder  
**SO:** Generated by a special order at POS (highlighted in purple).
- Vendor Style** The vendor style number for verification.
- Style Note** A note about the vendor style
- # Ordered** The quantity ordered.

- PO #/Customer**            The purchase order number associated with the ordered item. If it is a special order, the customer name will appear.
- Description**                A description of the item.
- Check/Uncheck All**        Allows you to quickly check or uncheck all the items in the list.
- Show Images**                Allows you to enable the image column.

For the purposes of the **Retrieve Queued** window and the **Purchase Order** window, line items will be color-coded as follows:

Yellow	Queued items
Purple	Special order items
Dark Red	Marked to be cancelled
Light Yellow	Other
Blue	Selected
Light blue	Hovering

3. Check the items that are included in this shipment. This should only be done for one invoice at a time.
4. Select **OK**. The **Receive Invoice** window will appear populated with the selected items.



Fields and options in the **Receive Invoice** window include:

- Show Images**                Used to show item images if available. This will help you identify the piece.
- Invoice #**                    The number of the vendor's invoice that contains the item. This is required.

<b>Date Received</b>	The date you are entering the items. By default, The Edge populates this field with the current date. It will go into the item record as the <b>Date Entered</b> value.
<b>Allocate Items to Store x</b>	Allows you to quickly allocate items to store the current store; if you use this, the <b>Allocate</b> window will not open for this item when you save the <b>Receive Invoice</b> window.
<b>Save All as Memo</b>	Allows you to quickly mark these items as memo items. For more information about memo items, see the section in the User Guide entitled Consignment and Memo Items. This will not work for bulk or special order items.
<b>Recall Costs</b>	Obtains costs for the ordered item lines for all items. If you have the system option set to use the most recent cost, it will load the most recent cost for that style code from the database.
<b>Items on Order</b>	Returns the <b>Items Ordered</b> window so you can select additional items.
<b>Add Line</b>	Allows you to manually add an item line to the invoice, from the style number records, or completely new. If the item is associated with a special order, it will be highlighted in purple.
<b>Delete Line</b>	If the item has been ordered, this deletes a line from the <b>Receive Invoice</b> list and the item is not received. It does not affect the purchase order, only the receive list. Next time you are receiving from the vendor, it will still appear. The item will be unchecked in the <b>Items Ordered</b> list.
<b>View Item Details</b>	Opens the item record for the selected item. Changes made will be reflected here.
<b>Receive All</b>	Automatically receives all items in the <b>Receive Invoice</b> list. It fills in the ordered quantities and dates them the current day.
<b>Allocate</b>	Allows you to allocate items for the currently selected line. If it is a special order, be sure to allocate to the correct customer.

5. In the **Invoice #** field, enter the invoice number. These will be applied to all items received on this shipment.
6. To add new or existing styles to be received on this shipment that didn't appear in the **Items Ordered** window, select **Add Line**. This is useful for shipments that did not have purchase orders associated with them. Alternatively, for items with a vendor barcode that has been in stock before, you can scan the tag and a line item will be populated for you. When you enter the style number, for items used before, The Edge will prompt you to copy the details for the existing record. Note that for special orders, items are highlighted. You must select the correct record to copy from for each customer.
  - a. **Source**: What initiated the order: **Q** is for Queue, **SO** is for Special Order.
  - b. **Qty Received to Date**: The quantity of this item so far on this purchase order.
  - c. **Qty Received Today**: The quantity of this item received in this shipment.
  - d. **Vendor Style/Note**: The vendor style number or note.
  - e. **Category**: The Edge category for the item.
  - f. **Description**: The Edge description of the item.
  - g. **Cost**: The cost of the item.
  - h. **Retail**: The retail price of the item.
  - i. **Lowest**: The lowest the item can be sold at; this is kept in the item record.
  - j. **Current**: The current price of the item; this is kept in the item record.
7. Edit item lines as needed. If you wish to undo changes to cost, use the **Recall Cost** button.
8. Specify quantity received for each style in the **Rec'd Today** field.
9. Press **Enter**. The **Allocate** window will appear.

Please allocate 1 items for style: 01/231

**Please allocate the incoming Inventory to the following stores and/or special orders.**

Cost

Description

Style Note

Allocate	Price Each	Ordered	Customer / Store	Entered	Ready By	Promised
<input type="text" value="1"/>	\$51.00	1	Abbott, Mike	7/19/2016	7/29/2016	
<input type="text"/>	\$51.00	1	HQ	7/19/2016		
<input type="text"/>	\$51.00	1	Store #2	7/19/2016		

OK Cancel

The **Allocate** window allows you to indicate how many of each item should go to which store. Fields and information in the **Allocate** window include:

- Cost** Cost of the total quantity of items in the line item.
- Description** Description of the item.
- Style Note** Further description, such size. It is available only for new items.
- Allocate** Quantity of this item to allocate to this store or special order.
- Price Each** Price of the item to the customer.
- Ordered** Quantity on order from purchase order for this store or special order.
- Customer/Store** The special order customer or store for this allocation line. Note that for special orders, the customer name will be listed with an individual line item to ensure accurate allocation.
- Entered** Date the item was entered for special order at POS.
- Ready By** Date the order is to be available.
- Promised** ETA date is firm, not an estimate.

10. Enter the number of that item to be allocated to each store.
11. Select **OK**. The line item in the **Receive Invoice** window will indicate that item has been allocated.

Q Ordered 1 | HOF100904 | 150 | Diamonds - Loose | 0.420 Carat Loose Hearts on Fire Triple Ideal Cut Diamond J/S2 AGS #104049564079 | \$805.00 | \$1,990.00 | \$1,990.00 | \$1,990.00

Rec'd 0

Allocations: HQ(1)

Qty Ord'd	Qty Rcv'd To Date	Qty Allocated	Retail	Customer / Store
1	0	1	\$1,990.00	HQ

12. Select **OK/Save & Close** to receive this shipment and add these items to inventory. You will have an opportunity to edit item details.



13. Repeat the entire process for each invoice. If a purchase order is associated with the order, its record will be updated to indicate that items were received.