To create a Purchase Order using the mini scanner, scan the barcode(s) of the item(s) that need to be inserted into the Purchase Order (various supplier’s items may be scanned; multiple Purchase Orders will be created). After all items are scanned connect the scanner to the computer and open Furniture Wizard. In the Main Menu of Furniture Wizard click Additional Features.

Under Additional Features click Mini Scanner to open the Mini Scanner Import Program. To import the items for the Purchase Order(s) click the Import Button or use the keyboard shortcut ALT + I.
Furniture Wizard will then read the mini scanner for the items scanned to create the new Purchase Order(s).

Mini Scanner Dialog Box

After importing the scanned items the Mini Scanner Dialog Box appears, here Scanner Tasks may be selected.
Create Purchase Order

From the Scanner Tasks Screen select the radio button next to Create PO and click the Process Task Button or use the keyboard shortcut ALT + P.
Acknowledgement

Acknowledging a Purchase Order

When a vendor sends an acknowledgement, it is best to note the acknowledgement within the Purchase Order. To do this open the Purchase Order the acknowledgement is related to. Once the Purchase Order is open fill in the Ack. No. Field with the order number, then mark each item on the Purchase Order as acknowledged, backordered, or discontinued under the status column.

One Purchase Order, Different Acknowledgements

If a Purchase Order has several items with different acknowledgement numbers, each item may be assigned its own acknowledgement number. To assign each item its own acknowledgement number, double click on the first line item on the Purchase Order to bring up the Purchase Order Item Notes.
Item Acknowledgement Field

When the acknowledgement number is received from the Supplier for an item on the Purchase Order; place the acknowledgement number in the Purchase Order Item Notes beside the Item Ack. No. Field. If there is an estimated time of arrival the date may be placed in the Item ETA Date Field. Lastly, the item status may also be selected as acknowledged, backordered, or discontinued.
To switch to the next item use the blue arrow buttons. Also, if an item is cancelled by the customer, the item may be converted to stock by click the Convert to Stock Button. Furniture Wizard will confirm the action. However, if an item is converted to stock, the invoice will need to be updated by either deleting the item off of the invoice or reprocessing the invoice.

Once all acknowledgements are inserted the Purchase Order Item Notes may be closed by clicking the Exit Button or using they keyboard shortcut ALT + X.
Creating a Service Order from a Purchase Order

If a piece of merchandise arrived damaged and is sold, the person receiving the Purchase Order should be notified to create a Service Order for the damaged inventory item.

To create a Service Order from a Purchase Order, double click on the line item of the Purchase Order that is damaged to bring up the Purchase Order Item Notes; then click the Service Tab. Note, that only merchandise that is for a customer may have a Service Order created for it through the Purchase Order Item Notes.

Under the Service Tab state the troubles reported and click the Create Service Request Button and the service order, service date, and status will automatically fill.
Changing Supplier Information

If the Supplier’s information is incorrect on a Purchase Order, the information may easily be changed. To update that Supplier simply double-click on the Supplier’s name to open the Suppliers Form.

Once in the Suppliers Form click the Edit Button or use the keyboard shortcut ALT + E. After clicking upon the Edit Button all changes may be made about the Supplier.
Bar Code Report

If a bar code report is needed for the items on the Purchase Order click the Bar Code Report Button and the Purchase Order Scanner Count Sheet Report appears.
**Quick Tag**

Inventory tags may also be printed through the Quick Tag form. To open the Quick Tag Form click the Quick Tags Button on the Purchase Order Form.

**Selecting Print Method**

In the Quick Tag Form the method of printing may be selected by selecting the radio button next to Print All Tags (Qty of 1) or Print Tags by Qty.
Print Options

The inventory tags may also be previewed by selecting the radio button next to preview, or they may be directly printed by selecting the radio button next to Print. Either option selected, the Print Button needs to be clicked upon after selecting the desired radio button.

Selecting the Size of the Inventory Tag

To select the size of the inventory tag use the grey buttons at the bottom of the Quick Tag Form.
Ashley Enabled Integration

If the Ashley Integration is enabled, to send an Ashley Purchase Order to Ashley Direct single click the Upload PO to Ashley Button to bring up the Ashley Furniture PO Submission form.
Submitting an Ashley Purchase Order

When submitting an Ashley Purchase Order through the Ashley Furniture PO Submission Form select the Date Expected and the shipping method (ship complete order, ship items as available, or ship series).

After the first two fields are filled in click the Send Button; the Purchase Order will be submitted and the Ashley Furniture PO Submission Form will automatically close. Once the Purchase Order is submitted the Date Send Field will automatically fill.
Checking Vendor Stock

If Ashley Integration is enabled through Furniture Wizard, the shipping warehouse of the Ashley merchandise may be checked on. To check on the stock of the items on the Purchase order, simply right-click on any of the line items on the Purchase Order and select Item Info.

After clicking on Item Info, the current stock report of the store’s current inventory appears (just like on the grid in the Inventory Form). From here to check the Ashley Warehouse for its current stock click the Check Vendor Stock Button or use the keyboard shortcut ALT + V.
The process may take a little time to show the Ashley Inventory Query Results, but when the results appear the warehouse stock is shown as current, fifteen days from now, thirty, and forty-two days from now. Each item from the Purchase Order is shown in the results. The results may also be printed by clicking on the Print Button or using the keyboard shortcut ALT + P.
Receiving Purchase Order Items

When merchandise arrived it needs to be received with the Vendor’s invoice. Receiving Purchase Orders is easily done through the Purchase Order Receive History Form. First the costs of each item must match the vendor’s cost. If the prices need updated simply enter the new price under the Price column in the Purchase Order Form.

If a price is updated, Furniture Wizard will display the following messages:
If the inventory cost should be updated click Yes. The following question states,

![](image)

If a drastic price change has occurred it is probably best to update the retail and regular price. However, if the price has only changed by a couple dollars it is probably best not to update retail and regular price.

Lastly, Furniture Wizard states:

![](image)

It is best to adjust the invoice item cost to keep the margin correct on the invoice attached to the Purchase Order.

**Receive PO Items Button**

After each item’s cost is updated (if necessary), the Purchase Order may be received; to start the receiving process click on the Receive PO Items Button on the Purchase Order Form.
When the Receive PO Items Button is clicked upon the Purchase Order Receive History Form appears.

Selecting a Date to Receive the Inventory Items

If the date needs to be changed to receive the purchase order items change the date field first to the desired date. (Furniture Wizard automatically uses “today's date” to receive the inventory items). To change the date manually type in the desired date or use the calendar button to open the calendar and select the date.
Searching For Items to Receive

If not all items arrived that were on the Purchase Order, then items that did arrive will need to be selected. To make finding the items easier, use the search fields at the top of the Purchase Order Receive History Form. Type in the model number and/or the acknowledgement number and click the Search Button. To start a new search single click the New Search Button.

Once the desired item is found double click on the item so the receiving processes may start. Once the item is double clicked upon it move from the yellow field box to the dark blue field box (this states that the item selected will be one of the items that will be received).
Do the above step for each item being received. Note, if an item has quantity two on the Purchase Order but only one arrived, single click on the item and change the quantity to receive to one instead of two.

Also, if an item is double-clicked upon to be received, but it is determined that the item did not arrived, simply change the quantity received column from the quantity to zero. This will remove the item from being received.

**Freight Distribution**

Once all items are added to be received freight must be taken into consideration. Freight may be by quantity, by cost, or by cube. Simply click the radio button next to the desired option and enter the amount in the white field box by using the keyboard.
Once freight distribution is updated cubes, number of piece, and total cost may also be updated if desired.
Receiving Report

It is recommended to print the Receiving Report. The Receiving Report shows all details about what is being received, the freight, the date received, the number of cubes, and the cost. The receiving report can either be directly printed to the printer by selecting the radio button next to Print, or it may be previewed by selecting the Print Preview radio button. The receiving report confirms that amount that will be received to the vendor’s invoice.

Post Receive Now

After confirming that the receiving report matches the amount to be received the Purchase Order may now be posted by clicking on the Post Receive Now Button
Once the Post Receive Now Button is clicked upon the Purchase Order Receive History Form closes and the items that were received are posted on the Purchase Order. When only a select few items are received on the Purchase Order the items received appear under the Received column and cannot be received again.
**Receive All Button**

If all items have arrived on the Purchase Order, the receiving process is the same. However, instead of searching and selecting each item individually simply click on the Receive All Button and all items will transfer from the yellow field box to the dark blue field box.

**Receiving History**

Receiving history may also be viewed through the Purchase Order Receive History Form. To see receiving history click on the Receive PO Items on the Purchase Order Form.
Once in the Purchase Order Receive History click on the Receiving History Button. This shows items that have been previously received and the amount in which the items were received at.
Inventory Quick Sort and Edit

The Inventory Quick Sort and Edit allows for items on the Purchase Order to be sorted, updated and inventory tags printed. To open the Inventory Quick Sort and Edit double click in the Total Field in the Purchase Order Form.

Sorting the Inventory Items

To sort click on the headings in the order the columns should be sorted by. The headings will then change colors to state how they have been sorted.
Editing the Inventory Items in the Inventory Quick Sort and Edit

To edit the inventory items on the Purchase Order through the Inventory Quick Sort and Edit simply click the Edit Button or use the keyboard shortcut ALT + E. All items may now be updated.

Printing Inventory Tags through the Inventory Quick Sort and Edit

To print inventory tags through the Inventory Quick Sort and Edit single click on the inventory item a tag needs to be printed for and click on the Quick Tag Button or use the keyboard shortcut ALT + T. Do this step for each item that needs an inventory tag.

Checking Stock in the Inventory Quick Sort and Edit

Inventory may also be checked through the Inventory Quick Sort and Edit. To check stock quantity single click on the item then click the Check Quantity Button or use the keyboard shortcut ALT + Q. The inventory grid appears, like the one shown in the Inventory Form.
Creating a New Purchase Order without Exiting the Purchase Order Form

To create a new Purchase Order without exiting the Purchase Order Form, simply click the New PO Button at the bottom of the Purchase Order Form or use the keyboard shortcut ALT + N.
Voiding a Purchase Order

To void a Purchase Order that no items have been received, simply click the Void Button at the bottom of the Purchase Order Form or use the keyboard shortcut ALT + V. The Void Purchase Order Screen appears.

To simply void the Purchase Order select the radio button next to Void and Click OK.
Cancel Remaining Items

If a Purchase Order already has items received the Purchase Order cannot be voided. However, the remaining items may be canceled. To cancel the remaining items on the Purchase Order click the radio button next to Cancel Remaining Items in the Void Purchase Order Screen then click Ok. This cancels all remaining items on the Purchase Order and then completes the Purchase Order.

Cancel Remaining Items and Re-Issue

The radio button next to cancel remaining items and re-issue cancels the items that were not received on the Purchase Order then recreates another Purchase Order with the items that were canceled off the first Purchase Order. This complete receives the first Purchase Order while leaving open the new Purchase Order. Click the radio button next to Cancel Remaining Items and Re-Issue then click OK in the Void Purchase Order Screen.
Exiting the Purchase Order Form

Once all changes and receiving have been done in the Purchase Order Form, the form may be closed. To close the Purchase Order Form simply single click the Exit Button or use the keyboard shortcut ALT + X. All changes will automatically be saved.