Setting Up and Receiving Ace Purchase Orders

Send and receive your Ace orders by following this specific *Ace best practices* workflow. We will demonstrate how to transmit an Ace purchase order, *receive the related invoices,* and then *finalize* the PO. Choose a topic to learn more.

Objectives

- Transmitting Ace Purchase Orders
- Receiving All Invoices
- Receiving Specific Invoices
- Finalizing Purchase Orders

Transmitting Ace Purchase Orders

From the main menu, select **Purchasing** > **Purchase Order**. You can search for the PO by number in the search field. If you want to use additional search filters, click **Table View.** By default, the **Status** filter is set to **Open**. When you tap **Search,** a list of all *open purchase orders* displays. Check the boxes to select individual purchase orders or check *this* box to select all. Tap **Actions** and select **Transmit Purchase Orders.** Choose where the retail price should be printed on the invoice and click **Transmit**. You can view the progress of the transmitted PO in **Alerts Viewer**. You can only transmit a purchase order if the *type* is **Normal**, the status is **Open**, and the supplier information is the same as the one defined in the *Ace retailer information.* Select the right arrow to proceed to the next topic.

Receiving All Invoices

After your purchase order is processed, Ace creates an invoice that contains the item number, quantity invoiced, quantity received, cost and retail price. The received invoice is used to reconcile, or compare, with the PO. If you would like to receive *all* open invoices at the same time, go to **Utilities** and then choose **Integrations**. Select **Ace Hardware Integration** and tap **Schedule Integration Updates.** Then, select **Invoice Receiving** using the checkbox and tap **Run Now**. For more information on *scheduling* this update, refer to the Help. Tap **Ok** in the confirmation prompt to run the task. An alert informs you when the invoices have been received. Tap the right arrow to proceed to the next topic.

Receiving Specific Invoices

You can manually receive specific invoices in the *Purchasing* page. Use the search field to select a purchase order or tap **Table View** to select multiple POs. Check the box to select a purchase order. Tap **Actions.** Select **Receive Invoices**. Decide if retail options *should not* be posted, Only regular retail *should be posted*, or to post a new retail *based on the* desired gross profit percentage. It's recommended to choose *Do not post* when you are regularly updating retails with Ace price changes. Determine what you want to happen if there are items on the invoice that don't match the target PO. You can create a new PO by invoice, add an additional PO for all unmatched items, or append the items to the target PO. If you want to add new items to your inventory, keep *this* toggle on. Then press **Receive Invoice**. Just as before, an alert will inform you when the invoice has been received. Select the right arrow icon to proceed to the next topic.

Finalizing Purchase Orders

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When stock from Ace arrives, you will need to update your quantity on hand. Search for the PO using its number *here* or use the *Table View* in the **Purchasing** page for additional filters. Under **Status**, tap **Clear** and choose "*In Receipt*" from the drop-down menu. Press **Search**. You can see all PO's that are ready to be verified and finalized. Check the box to select a PO and tap **Receiver**. If all items are accounted for, select this check box and press **Receive All**. To clear a selected field, press **Clear All**. Click *here* to add an item not currently in your order. *This* button allows you to add a serial number to any selected item. You can also enter the quantity received in *this field.* After changes are made, press **Save.** Under **Review Totals and Finalize**, once again confirm that everything is correct and then tap **Save and Finalize**. Depending on your store's policy, select **Finalize** again or **Print and Finalize**.

Recap

In this course, we showed how to transmit an Ace purchase order, receive the related invoices, and finalize your receipts.

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