

# Receiving in Purchasing Job Aid

## *Overview*

This Job Aid entails procedures for receiving in the Purchasing module.

## *Background Information*

To access receiving in the Purchasing module, you must have a Power Receiver role. If you do not have a Power Receiver role, you must receive your Requisitions in e-Procurement. For more instructions on receiving in e-Procurement, please see the "Receive Order" Job Aid.

## *Purpose*

Power Receivers have abilities to receive in the Purchasing module to quickly receive items for their own Requisitions and others' Requisitions. The Purchasing module also enables Power Receivers to view more information than what is available from e-Procurement. The Purchasing module also gives users ability to cancel any unwanted receipts.



## Navigation

Purchasing > Receipts > Add/Update Receipts

### Step 1

Click: **Add**

The screenshot shows a 'Menu' window on the left with a search bar and a tree view. The tree view is expanded to 'Add/Update Receipts'. On the right, the 'Receiving' form is visible, featuring tabs for 'Find an Existing Value' and 'Add a New Value'. The form contains fields for 'Business Unit' (FSU01), 'Receipt Number' (NEXT), and a checked 'PO Receipt' checkbox. A red box highlights the 'Add' button.

### Step 2

Input:

**ID**  
(PO ID)

Click: **Search**

The screenshot shows the 'Select Purchase Order' search form. It includes search criteria for PO Unit (FSU01), ID (highlighted in yellow), Line/Sched Num, Release, Item ID, Ship To, and Ship Via. It also has date fields for Days +/- Today (30), Start Date (10/02/2006), and End Date (12/01/2006). Other fields include Vendor Name, Vendor Item ID, Manufacturer ID, and Manufacturer's Item ID. A 'Retrieve Open PO Schedules' checkbox is checked. A red box highlights the 'Search' button. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons, and a 'Receipt Qty Options' section with radio buttons for 'No Order Qty', 'Ordered Qty', and 'PO Remaining Qty'.



### Step 3

Select **checkbox** for line to be received, or (if receiving all lines) click **Select All** link.

Click: **OK**

**Select Purchase Order**

Search Criteria

PO Unit: FSU01      Days +/- Today:

ID: 210921      Start Date:  31

Line/Sched Num:  /       End Date:  31

Release:       Vendor Name:  [Vendor Lookup](#)

Item ID:       Vendor Item ID:

Ship To:       Manufacturer ID:

Ship Via:       Manufacturer's Item ID:

Retrieve Open PO Schedules

Receipt Qty Options  
 No Order Qty       Ordered Qty       PO Remaining Qty

Retrieved Rows Customize | Find | View All | First 1-4 of 4 Last

Selected Rows      [Shipping Related](#)      [More Details](#)

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	FSU01	0000210921	1	1		10/17/2006	2.0000			<a href="#">6500 lumen LCD projector (Eiki</a>
<input type="checkbox"/>	FSU01	0000210921	2	1		10/17/2006	2.0000			<a href="#">15x20 rear projection screen</a>
<input type="checkbox"/>	FSU01	0000210921	3	1		10/17/2006	2.0000			<a href="#">Specialty lenses</a>
<input type="checkbox"/>	FSU01	0000210921	4	1		10/17/2006	1.0000			<a href="#">Labor: delivery, setup and st</a>

[Select All](#)       [Clear All](#)

          



## Step 4

Adjust Receipt Qty as needed.

Click: **Save**

**Maintain Receipts**

### Receiving

**Business Unit:** FSU01      **Receipt Status:** Open ✘

**Receipt ID:** NEXT      [Add Comments](#)      [Activities](#)

[Header Details](#)

▶ Header

[Select Purchase Order](#)

**Receipt Lines**      [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-4 of 4 | [Last](#)

**Receipt Lines**      [More Details](#)      [Links and Status](#)      [Item / Mfg Data](#)      [Optional Input](#)      [Source Information](#)

Line	Item	Description	Description	Price	Receipt Qty	*Recv UOM	Accept Qty	Status	Serial	Device Track	Stock UOM	Device Track
1		<a href="#">6500 lumen LCD projector (Eiki)</a>	6500 lumen LCD projector (Eiki X-5)	450.00000	2.0000	EA	2.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	EA	<a href="#">Device Track</a> <span style="color: red;">✘</span>
2		<a href="#">15x20 rear projection screen</a>	15x20 rear projection screen	350.00000	2.0000	EA	2.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	EA	<a href="#">Device Track</a> <span style="color: red;">✘</span>
3		<a href="#">Specialty lenses</a>	Specialty lenses	125.00000	2.0000	EA	2.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	EA	<a href="#">Device Track</a> <span style="color: red;">✘</span>
4		<a href="#">Labor: delivery, setup and st</a>	Labor: delivery, setup and strike	450.00000	1.0000	EA	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	EA	<a href="#">Device Track</a> <span style="color: red;">✘</span>

**Interface Receipt**      [Print Delivery Report](#)      [Interface Asset Information](#)

**Note:** If receiving a Blanket Order, receive the dollar amount to be invoiced.

## How to Code a Help Ticket

Issue Area: Purchasing  
Issue Type: Receiving

## More Information

More information can be found on the Purchasing Website:  
<http://www.purchasing.fsu.edu/listofjobaids.html>

