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# PURCHASING USER MANUAL

## ENTER RECEIVING INFORMATION

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1. On the **Status** screen, click **Select** next to a purchase order.
2. The purchase order items will be displayed on the **Receiving** screen.

Figure 1 - Receiving screen

Rcv	Item Status	Item #	Description	Qty	Unit	Price
<a href="#">Select Preview</a> <input type="checkbox"/>	Ordered	521-933	paper	1	Box	\$60.00
<a href="#">Select Preview</a> <input type="checkbox"/>	Ordered	155-6666	pen	8	Box	\$60.00
<a href="#">Select Preview</a> <input type="checkbox"/>	Ordered	265-899	markers	9	Box	\$10.00
<a href="#">Select Preview</a> <input type="checkbox"/>	Ordered	151669-3	tape	14	Box	\$50.00
<a href="#">Select Preview</a> <input type="checkbox"/>	Ordered	165685	staples	5	Box	\$5.00

3. Review the purchase order to compare it to the items received.
  - Review the line item details on the receiving screen for **Item #**, **Description**, quantity (**Qty**), **Unit**, and **Price** (if Prices have been enabled by your administrator.)
  - Click **Preview** next to a line item if you want to view and/or print the line item details in PDF format.
  - Click **Print Preview RCVG** if you want to view and/or print the entire purchase order details in PDF format.
4. If all items ordered are received, check the **Rcv** check box next to each line item and then click **Receive**.
5. If any items ordered are not received or do not match the purchase order, click **Select** next to the line item.
  - a. The **Order Quantity**, **Quantity Outstanding**, **Unit of Measure**, **Unit Price**, and **Requested Delivery Date** are informational only and cannot be changed by the receiver.

Figure 2 - Items backordered

- b. Enter the **Actual Receiving Date** (or click the calendar icon to select a date).
- c. Select a reason why the items received do not match the purchase order – **Something is missing, Something is broken, Something is backordered/partial receipt, or Something is not available.** (You will be able to select only one. If you receive a shipment that has items broken and items backordered, select **Something is missing** and add **Notes** to explain.)
- d. Enter the actual **Quantity Received**.
- e. Click the **Line Item Notes** icon to add explanatory notes, e.g., why items were not received or why items were returned, etc.
- f. Click **OK**.
- g. Click **Done**.
- h. If needed, the purchaser can update the purchase order to cancel or reject unavailable items, etc.

## E-MAIL NOTIFICATIONS

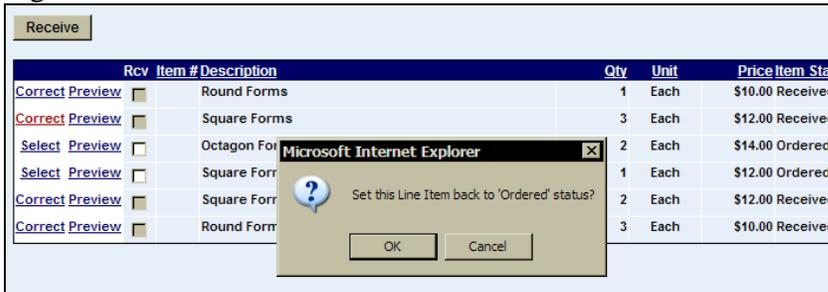
If the agency administrator has enabled e-mail notification, an e-mail will be sent automatically when the receiver marks that something is missing, broken, backordered, or not available.

<u>Action</u>	<u>E-mail recipient</u>
Received/Something Missing	Requester/Purchaser
Broken	Requester/Purchaser
Backordered/Partial	Requester
Received (all)	Requester
Not Available	Requester/Purchaser

## CHANGE ITEMS FROM RECEIVED TO NOT RECEIVED

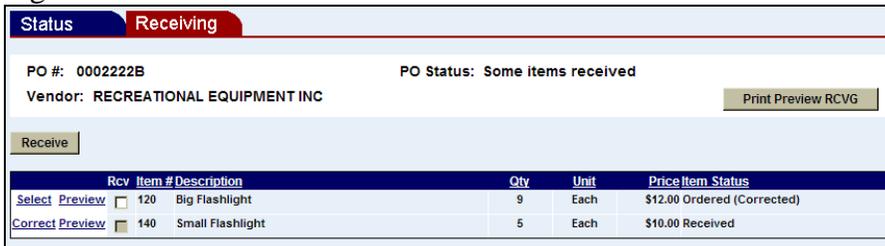
If you mark items as received that actually were *not* received, or if a purchaser needs to send back (reject or cancel) an item that was received, click **Correct** next to the item(s), and then click **OK**.

Figure 3 - Correct a received item



Items will revert to status of **Ordered (Corrected)**. If the items are received later, you can you can then select and mark then as received then.

Figure 4 - Corrected status



If some purchase order items are not ever going to be received, the purchaser can cancel the items on the purchase order that will not be received. The status of the purchase order will become "All items received or cancelled".