



DataCollection Receiving

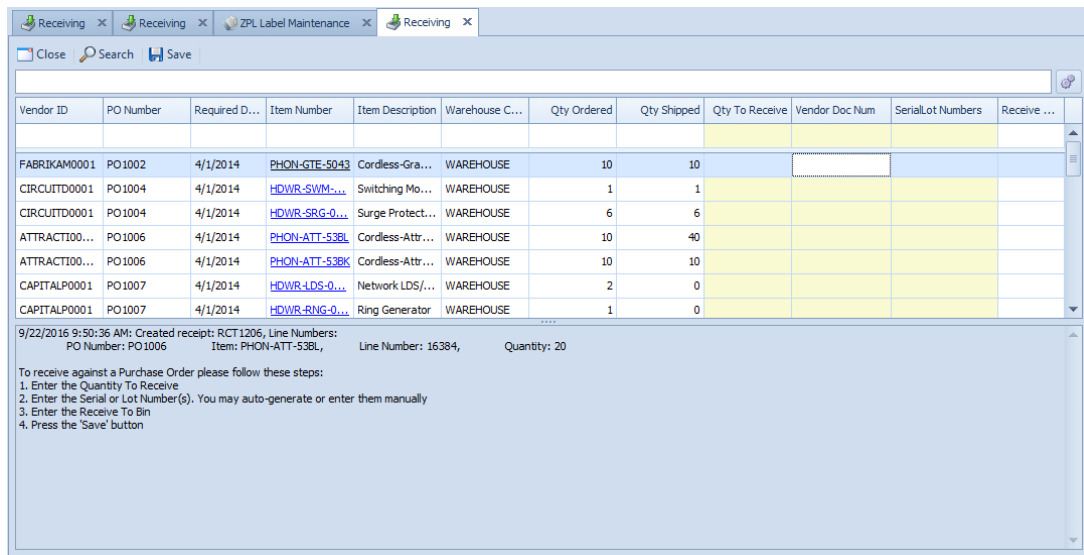
Megan De Freitas - 2024-11-22 - Miscellaneous

Overview

The DataCollection Receiving module provides a search function where vendor purchase lines can be viewed and marked received. Results display purchase orders and quantity of line items ordered and received. Users enter new quantities received and their locations to update inventory. In this document, you will learn how to search within the Receiving module, as well as how to receive items. Any relevant securities and settings will be listed at the end of the document.

Receiving

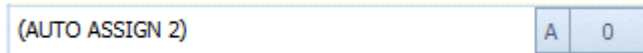
Access the Receiving search screen by selecting Receiving from the Purchasing category.



Usage

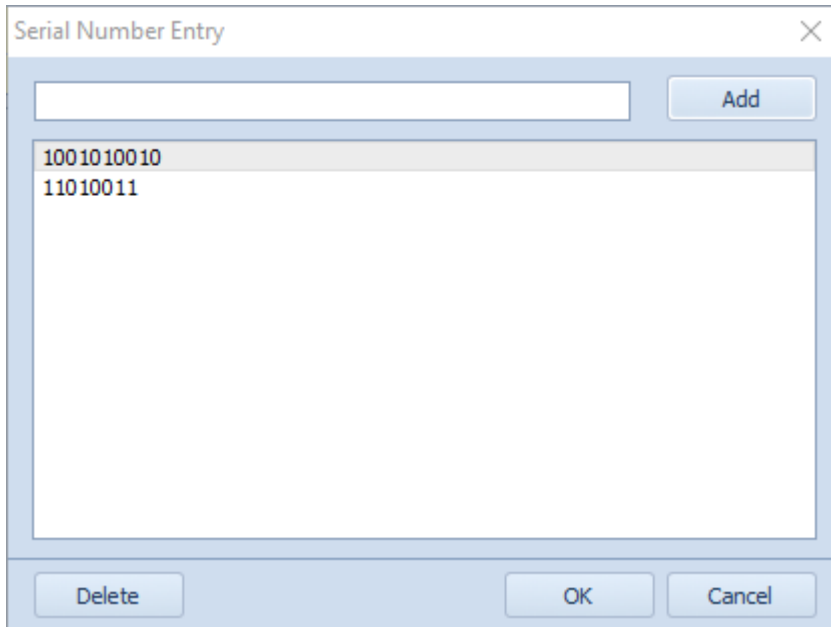
To mark quantities as received and process receiving updates, search by vendor and/or PO #, and sort/filter results as needed. Once you have the items populated, fill out the fields highlighted in yellow: Qty to Receive is the amount of an item that you are adding into your inventory; Vendor Doc Num is the document number that you want the item to use in the warehouse workflow; SerialLot numbers are the serial or lot numbers you want to use for the item. SerialLot numbers can be automatically assigned by clicking the A button on the

right of the field.



(AUTO ASSIGN 2) A 0

Serial numbers can pull from a predetermined pool by clicking the number to the right of the A. This will open up the Serial Number Entry window. Enter the desired serial numbers here and they will be assigned to the items selected.

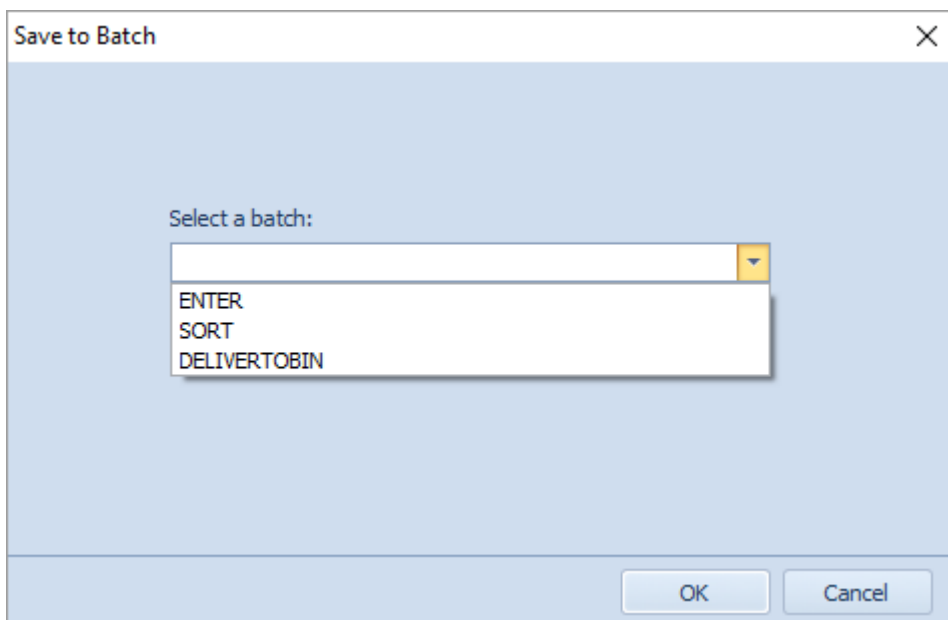


Serial Number Entry

1001010010
11010011

Buttons: Add, Delete, OK, Cancel

The Receive to Bin field is a dropdown where you can select the Bin to which the item should be received. After confirming that all desired lines have been adjusted, click **Save** to process the receipts. The batch selection window will pop up. Use the dropdown to select the batch you want to move the document to, then click the **OK** button.



Save to Batch

Select a batch:

ENTER
SORT
DELIVERTOBIN

Buttons: OK, Cancel

Quantities will be updated in the system for all completely filled lines. The Receiving window will display information about each processed line including receipt numbers and

any messages along the bottom of the screen.

Vendor ID	PO Number	Required D...	Item Number	Item Description	Warehouse C...	Qty Ordered	Qty Shipped	Qty To Receive	Vendor Doc Num	SerialLot Nu...	Receive To Bin
FABRIKAM0001	PO1002	4/1/2014	PHON-GTE-5043	Cordless-Gra...	WAREHOUSE	10	50				
CIRCUITD0001	PO1004	4/1/2014	HDWR-SWM-...	Switching Mo...	WAREHOUSE	1	1				
CIRCUITD0001	PO1004	4/1/2014	HDWR-SRG-0...	Surge Protect...	WAREHOUSE	6	6				
ATTRACTI00...	PO1006	4/1/2014	PHON-ATT-538L	Cordless-Attr...	WAREHOUSE	10	40				
ATTRACTI00...	PO1006	4/1/2014	PHON-ATT-538K	Cordless-Attr...	WAREHOUSE	10	10				
CAPITALP0001	PO1007	4/1/2014	HDWR-LDS-0...	Network LDS/...	WAREHOUSE	2	0				
CAPITALP0001	PO1007	4/1/2014	HDWR-RNG-0...	Ring Generator	WAREHOUSE	1	0				

9/26/2016 8:18:58 AM: Created receipt: RCT1207, Line Numbers:
 PO Number: PO1002 Item: PHON-GTE-5043, Line Number: 16384, Quantity: 40

To receive against a Purchase Order please follow these steps:
 1. Enter the Quantity To Receive
 2. Enter the Serial or Lot Number(s). You may auto-generate or enter them manually
 3. Enter the Receive To Bin
 4. Press the 'Save' button

A separate receipt will be created for each unique Vendor Document ID and Purchase Order. If no document number is entered, all the lines selected for receiving will be placed on the same receipt.

Security and Application Settings

Security

*Receiving** - Allows users to see and use the Receiving module.

Settings

*Receiving** -Allows users to edit the setup for the Receiving module.

*Receiving (Scanner)** - Allows users to edit the setup for the scanner in user with the Receiving module.

Note: Securities with an asterisk (such as *Receiving*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Settings with an asterisk are headers that have several settings within them. Review and customize these as desired.