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Purchase Order Receiving

Megan De Freitas - 2024-12-03 - Miscellaneous

Overview

The Receiving screen allows users to quickly receive one or more purchase orders. Users search for receipt lines by vendor or purchase order number. Results display PO line items with their ordered quantity and the quantity received so far, and users can mark lines as received. Receiving transactions generates purchase receipts, which are grouped by PO number and vendor. Receipts must be then posted manually in Dynamics GP.

Receiving X												
Close 🔑 Search 🚽 Save												
												P
Vendor ID	PO Number	Required D	Item Number	Item Descr	Warehous	Qty Ordered	Qty Shipped	Qty To Re	Vendor Do	SerialLot N	Receive To	
RBC	RBC	=	R B C	R B C	R B C	=	-	-	RBC	RBC	8 8 C	-
ACETRAVE	PO2102	5/11/2018	HD-20	20 Gig Har	WAREHOUSE	10,000	0					
ADVANCE	PO2109	6/20/2018	<u>HD-20</u>	20 Gig Har	WAREHOUSE	1	0					
ACETRAVE	PO2088	2/20/2018	CAP 100	Capacitor	WAREHOUSE	1	0					
ACETRAVE	PO2088	2/20/2018	<u>HD-40</u>	40 Gig har	WAREHOUSE	1	0					
ACETRAVE	PO2088	2/20/2018	HD-60	60 Gig har	WAREHOUSE	1	0					
ACETRAVE	PO2092	4/12/2017	<u>HD-20</u>	20 Gig Har	WAREHOUSE	1	0					
ACETRAVE	PO2093	4/12/2017	<u>HD-20</u>	20 Gig Har	WAREHOUSE	1	0					
ACETRAVE P02111 7/17/2018 HD-20 20.Gin Har WAREHOUSE 5.000 0												
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												

Usage

To receive items against purchase orders:

- 1. Search by vendor or purchase order number and sort/filter the results as needed.
- Fill out the fields highlighted in yellow. These include Qty to Receive, Vendor Doc Num, Serial/Lot Numbers, and Receive To Bin. The Vendor Document Number is optional. You can receive more than one PO in the same transaction, but receipts will be grouped by PO number and vendor number.
 - When receiving lot tracked items, lot numbers can either be entered manually or auto-generated. To auto-generate a lot number, click the A button inside the Serial/Lot numbers cell in the data grid row for that item.

Vendor ID	PO Number	Required D	Item Number	Item Descr	Warehous	Qty Ordered	Qty Shipped	Qty To Re	Vendor Do	SerialLot N
RBC	RBC	=	8 8 C	8 <mark>8</mark> C	RBC	=	-	-	REC	RBC
ADVANCE	PO2109	6/20/2018	HD-20	20 Gig Har	WAREHOUSE	1	0			
ACETRAVE	PO2088	2/20/2018	CAP 100	Capacitor	WAREHOUSE	1	0			А

To receive serial tracked items, click the button with the serial number count
 0 inside the Serial/Lot Numbers cell in the data grid row for that item.

Vendor ID	PO Number	Required D	Item Number	Item Descr	Warehous	Qty Ordered	Qty Shipped	Qty To Re	Vendor Do	SerialLot N
RBC	RBC	=	RBC	RBC	8 8 C	-	-	-	88C	8 8 C
CAPITALP	PO1007	4/1/2014	HDWR-PR	Processor	WAREHOUSE	2	0			A 0

The Serial Number Entry screen will appear, allowing manual entry of all serial numbers. Alternatively, you may click the **A** button in the cell, which will auto-generate all serial numbers for that receipt line.

erial Number Entry	8
2011	Add
2011122301	
20112302	
Delete	OK Cascel
Delete	Calicei

- 3. Click **Save** to process receipts.
- 4. You will be prompted to select or enter a Receiving Batch:

ve to Ba	tch		Σ
	Select a batch:		
	IN TRANSIT	-	I
		ОК	Cancel

- 5. Select a batch and click **OK.**
- 6. The lower pane of the Receiving screen will display information about each processed line, including receipt numbers and messages on any lines that did not process correctly. All quantities will be updated in the data grid to reflect the changes applied.

Adjusting Settings to change Lot/Serial Number Formats

To change default Lot/Serial number formats in the Settings module:

- 1. Filter to receiving.
- Change the Auto Assign Lot/Serial Number Format setting to your desired format. The default value is {0:yyyyMMdd}_{1:0000}, meaning that during the auto generation of serial or lot numbers, the format used will consist of the system date in yyyMMdd format followed by an underscore and a unique auto-incremented number.

P Settings ×	
Close 📙 Save	
*auto assign num	
A Receiving	
Auto_Assign_Lot_Number_Format	{0:yyyyMMdd}_{1:0000}
Auto_Assign_Serial_Number_Format	{0:yyyyMMdd}_{1:0000}

3. A Default Receiving Bin can be assigned for all receipts by entering a value in the

Default Receiving Bin setting.

P Settings X						
📑 Close 🛛 🛃 Save						
*default receiving						
▲ Receiving						
Default_Receiving_Batch	SALESPAD DC					
Default_Receiving_Bin	AUTOCREATE					

Security

Receiving - Grants access to the Receiving module.