



Purchase Order Receiving

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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.

Vendor ID	PO Number	Required D...	Item Number	Item Descr...	Warehou...	Qty Ordered	Qty Shipped	Qty To Re...	Vendor Do...	SerialLot N...	Receive To...
ACETRAVE...	PO2102	5/11/2018	HD-20	20 Gig Har...	WAREHOUSE	10,000	0				
ADVANCE...	PO2109	6/20/2018	HD-20	20 Gig Har...	WAREHOUSE	1	0				
ACETRAVE...	PO2088	2/20/2018	CAP100	Capacitor	WAREHOUSE	1	0				
ACETRAVE...	PO2088	2/20/2018	HD-40	40 Gig har...	WAREHOUSE	1	0				
ACETRAVE...	PO2088	2/20/2018	HD-60	60 Gig har...	WAREHOUSE	1	0				
ACETRAVE...	PO2092	4/12/2017	HD-20	20 Gig Har...	WAREHOUSE	1	0				
ACETRAVE...	PO2093	4/12/2017	HD-20	20 Gig Har...	WAREHOUSE	1	0				
ACETRAVE...	PO2111	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.
2. 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.

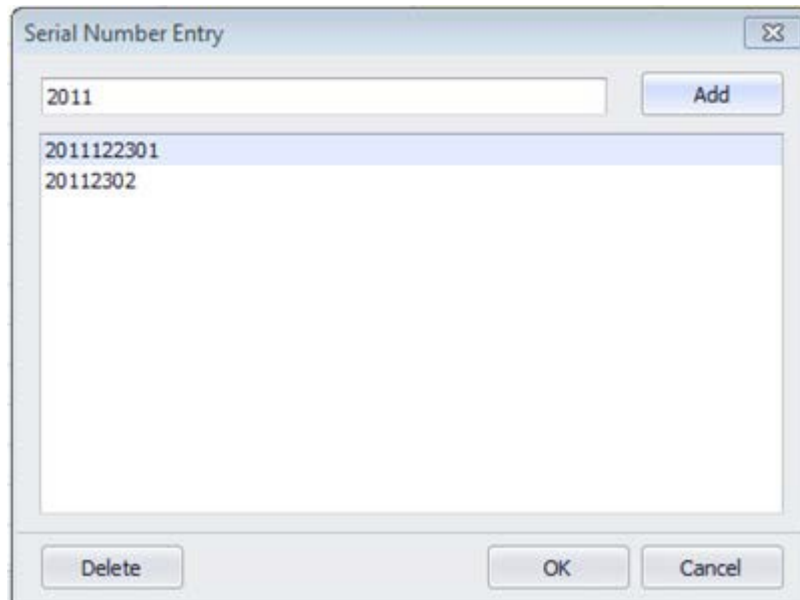
1. When receiving lot tracked items, lot numbers can either be entered manually or auto-generated. To auto-generate a lot number, click the **A** button inside the Serial/Lot numbers cell in the data grid row for that item.

Vendor ID	PO Number	Required D...	Item Number	Item Descr...	Warehou...	Qty Ordered	Qty Shipped	Qty To Re...	Vendor Do...	SerialLot N...
ADVANCE...	PO2109	6/20/2018	HD-20	20 Gig Har...	WAREHOUSE	1	0			
ACETRAVE...	PO2088	2/20/2018	CAP100	Capacitor	WAREHOUSE	1	0			A

2. 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.

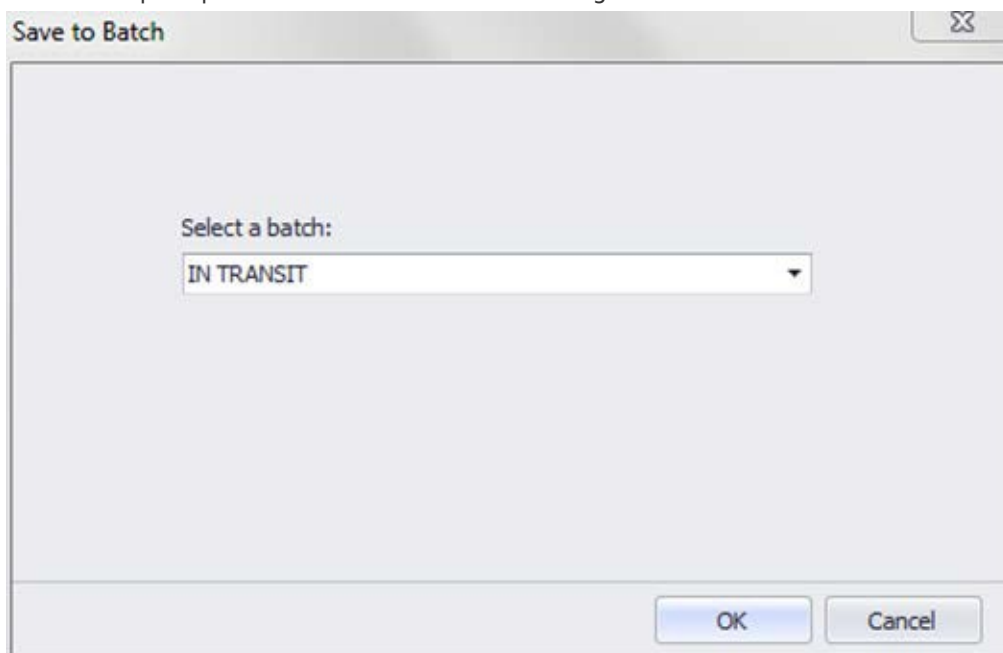
Vendor ID	PO Number	Required D...	Item Number	Item Descr...	Warehous...	Qty Ordered	Qty Shipped	Qty To Re...	Vendor Do...	SerialLot N...
■□c	■□c	=	■□c	■□c	■□c	=	=	=	■□c	■□c
CAPITALP...	PO1007	4/1/2014	HDWR-PR...	Processor ...	WAREHOUSE	2	0			A 0

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.



The 'Serial Number Entry' dialog box features a text input field at the top containing '2011' and an 'Add' button to its right. Below this is a list box containing the serial numbers '2011122301' and '20112302'. At the bottom of the dialog, there are three buttons: 'Delete', 'OK', and 'Cancel'.

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



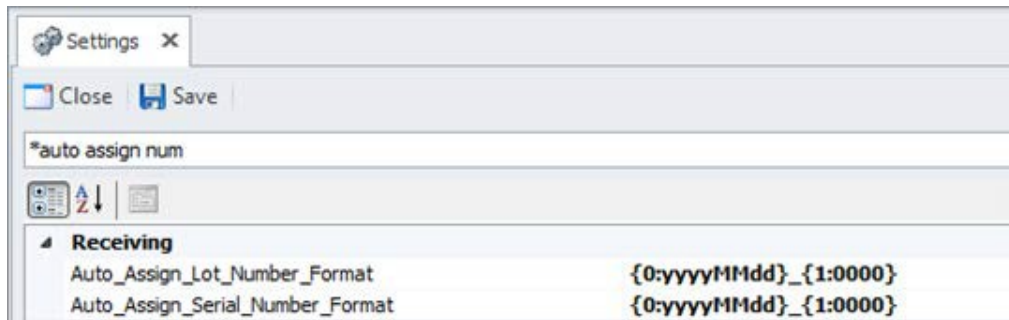
The 'Save to Batch' dialog box contains a label 'Select a batch:' above a dropdown menu. The dropdown menu currently displays 'IN TRANSIT'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'.

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.

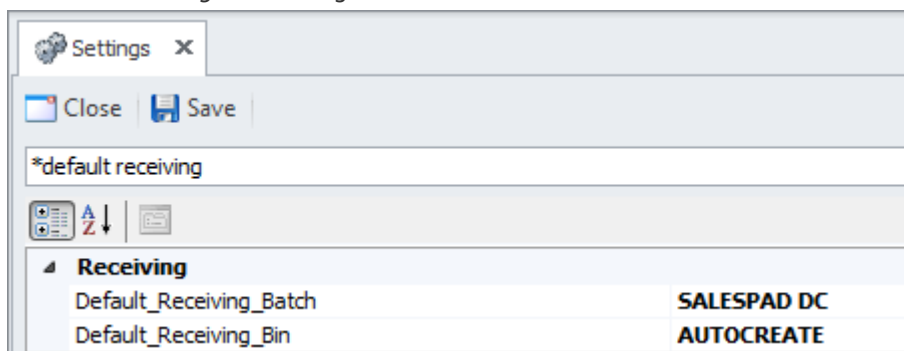
Adjusting Settings to change Lot/Serial Number Formats

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

1. Filter to receiving.
2. 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 yyyyMMdd format followed by an underscore and a unique auto-incremented number.



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



Security

Receiving - Grants access to the Receiving module.