

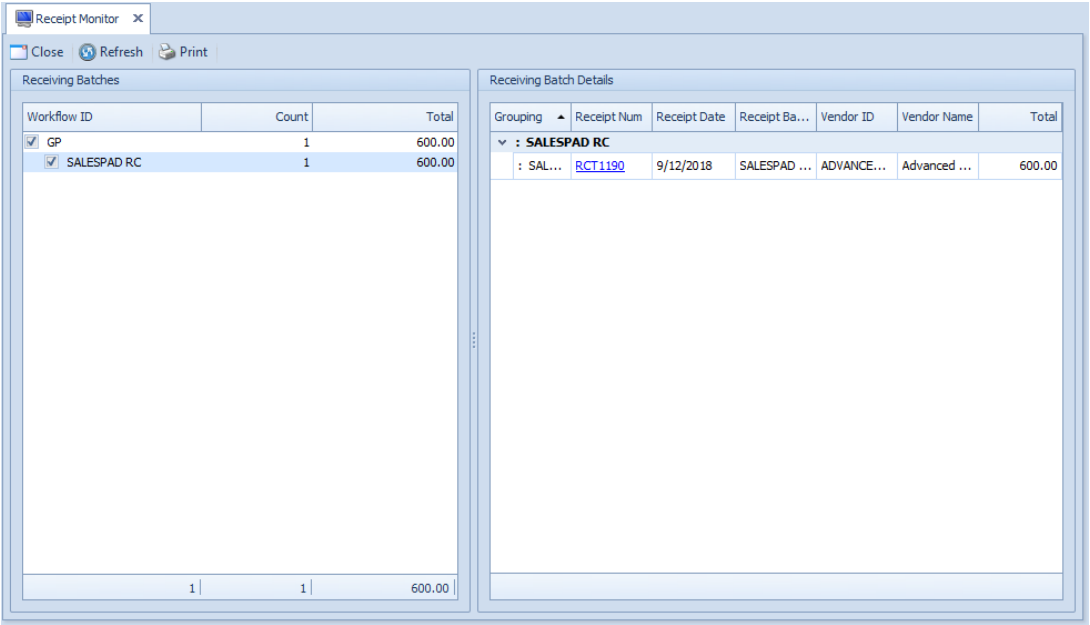


Receipt Monitor

Megan De Freitas - 2025-06-16 - Miscellaneous

Overview

The Receipt Monitor provides a complete view of all open receipt documents in your system, and each document’s status. Receipt Monitor can be configured to show only the desired workflow batches, where documents can be moved to other batches. In addition, users can click on the receipt number link to open the receipt card and view details such as items received and serial/lot numbers.



Usage

Display

The Receipt Monitor displays receipt documents, organized by workflow batch. All workflow batches appear on the left pane of the screen. Batches created in Dynamics GP will be displayed under a default header.

Receiving Batches		
Workflow ID	Count	Total
<input checked="" type="checkbox"/> GP	1	600.00
<input checked="" type="checkbox"/> SALESPAD RC	1	600.00

The right pane displays all open documents in the selected workflow batches. Multiple workflow batches can be monitored simultaneously by selecting more than one batch. Documents will be displayed under their respective batch name.

Receiving Batch Details						
Grouping	Receipt Num	Receipt Date	Receipt Ba...	Vendor ID	Vendor Name	Total
▼ : SALESPAD RC						
	: SAL... RCT1190	9/12/2018	SALESPAD ...	ADVANCE...	Advanced ...	600.00

All receipt numbers are displayed as a hyperlink under the Receipt Number column. Clicking on the link of a receipt number (or double-clicking elsewhere on the line) opens the Receipt card for that receipt.

Close

Delete

Save

Split Receipt

Forward

Receipt

Receipt Num

RCT1190

Receipt Type

Invoice

Receipt Date

9/12/2018

Vendor ID

ADVANCED0001

Vendor Name

Advanced Office Systems

Vendor Doc Num

Z393667521

Total

600.00

Receipt Batch

SALESPAD RC

Receipt Lines

Receipt Audit

Item Number

Item Descr...

UOM

Quantity

Source

PO Number

HD-20	20 Gig Har...	EACH	0	Open	PO2122
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Receipt Line Details

Serial Lot...	Serial Lot...	Bin	Quantity	Confirmed	Expiration Date
			0		

The lower left pane in the Receipt card displays all the items received so far and their quantities. The lower right pane shows the serial lot details for the item selected.

Moving Documents to a New Batch/Queue

On the Receipt card, users can move documents to a different workflow batch. To move a single document, select the destination workflow batch from the **Receipt Batch** dropdown and click **Save**.

Close

Delete

Save

Split Receipt

Forward

Receipt

Receipt Num

RCT1190

Receipt Type

Invoice

Receipt Date

9/12/2018

Vendor ID

ADVANCED0001

Vendor Name

Advanced Office System

Vendor Doc Num

Z393667521

Total

600.00

Receipt Batch

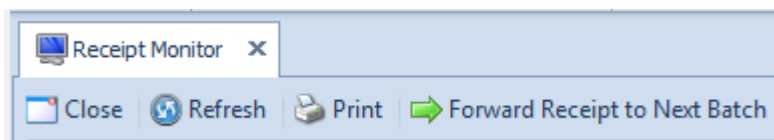
SALESPAD RC

Splitting the Receipt

Users can split receipts by clicking the **Split** button in the Receipt card. The Split Receipt screen lists all the items and serial/lot numbers in the receipt. Select the desired items to split by double-clicking on the item or by entering the split quantity. Click the **Split** button one more time to complete the split operation. DataCollection deletes the selected items and lots from the original receipt and creates a new receipt document with the marked merchandise.

Splitting Receipt: RCT1184 X									
Close Select All Select None Split									
Line #	Item Number	Item Description	Serial Lot Number	Bin	Receipt Date	Warehouse Code	Quantity	Is Confirmed	Split Quantity
16384	A100	Audio System			5/2/2014	WAREHOUSE	1	<input type="checkbox"/>	Non Tracked
		Audio System		AUTOCREATE			1	<input type="checkbox"/>	0
32768	HD-20	20 Gig Hard Drive			5/2/2014	WAREHOUSE	1	<input type="checkbox"/>	Non Tracked
		20 Gig Hard Drive		AUTOCREATE			1	<input type="checkbox"/>	0
49152	HD-40	40 Gig hard drive			5/2/2014	WAREHOUSE	1	<input type="checkbox"/>	Non Tracked
		40 Gig hard drive		AUTOCREATE			1	<input type="checkbox"/>	0

Refresh, Print, and Forward Receipts



On the Receipt Monitor header, click **Refresh** to instantly update the monitor's grid view to include any new workflow batches, receipt documents in the system, or document changes.

Click **Print** to open a window, allowing you to print a selected receipt. A label will need to be created in the Report Manager prior to using this feature.

Click **Forward to Next Batch** to instantly forward a selected receipt to its next workflow batch, if available. Workflows will need to be set up before using this feature; see the [Workflow Setup](#) document for more information. This feature will need to be enabled in the Security Editor as well.

Security

Receipt Card - Grants access to individual receipt documents.

Receipt Forward - Allows forwarding of receipts to different batches from the Receipt card.

Receipt Monitor - Grants access to the Receipt Monitor module.

Receipt Splitting - Allows splitting of receipts from the Receipt card.