



e-Mall Receiving

March 2017



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Receiving Overview

The receiving process is a relatively simple procedure.

Receiving allows you to track the receipt of an item. The Receiving section provides the ability to partially or completely accept goods and/or services, or reject items/services.

There are two types of receiving: **Desktop** Receiving and **Central** Receiving. The type of receiving used is determined by the setup of the BuysenseOrg (BSO) to which your user profile is assigned.

*In **Desktop** Receiving*, the preparer of the requisition has the authority to receive the goods or services directly from the vendor when it is delivered.

*In **Central** Receiving*, a designated user (such as an employee at a central warehouse) receives the goods or services on behalf of the preparer.

The receiving process begins when a requisition reaches "Ordered" status.

When a requisition is fully approved and is in ordered status, the system creates a receipt 'shell' in anticipation that *Receiving* will be logged on order(s) created as a result of the approved requisition.

Upon receipt of shipped goods or provided services, the receiver can receive the items and verify they match the items from the original request.

Receiving phrases/terms/descriptions:

- ✚ **Reopen Closed Order** – A 'Reopen Order' button is provided in *Receiving* for situations where changes must be made on the requisitions and- the order has been fully received.
- ✚ **Rejected Items** – A 'Reject' field is provided in *Receiving* for situations where an item is received but **NOT** yet recorded as having been received, and must be returned to the vendor for some reason (defective/not ordered, etc.). This field should **NOT** be used for items that need to be returned after the item(s) has been recorded as having been received.
- ✚ **Negative Receiving** – The 'Accept/Return' field is used in *Receiving* for situations where item(s) are accepted. It is also used, however, to back out items previously recorded as having been received when the item must be returned to the vendor **OR** if the requisition must be changed and the system is requiring that receiving be altered.

Processing Receipts

1. After finding the order number*, click the Receive link on the eVA eMail 'My Home' page.



2. Enter the order number* in the Search field, as shown:



- * If the order number is unknown, a Requisition number (Req ID) or Receipt number (Receipt ID) can also be entered by using the drop down menu to select the alternate search type:



3. When the applicable screen appears, take the appropriate action:

- a. To receive all items on the order, click the 'Accept All' button. If necessary, adjust the date received on line(s) where product was received prior to current day.

- b. To record partial receiving, enter the quantity in the Accept/Return field, adjusting the date received, if necessary.

Receiving Steps: 1 Select Request, 2 Select Receipt, 3 Receive, 4 Additional Info, 5 Summary

Receipt RC600334: PCD60095 - TEST for email Approver Access

Order ID: PCD60095 Date: Fri, 6 Apr, 2012, 3:58 PM
 Order Title: TEST for email Approver Access Processing Status: Receiving
 Supplier: VENDOR NAME CHANGE Header Cross Reference:
 Contact: VENDOR
 My Labels: Apply Labels...

Line Items - Quantity Receiving Needed

No.	Y	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1		15	Vita contract categories mandvita	each	0	0	0	Fri, 6 Apr, 2012

Close Order: Yes No

COMMENTS - ENTIRE RECEIPT

ATTACHMENTS - ENTIRE RECEIPT

item(s), denote the quantity to be rejected in the REJECT field, as shown below. This field should NEVER be used to record a 'return' after the product or service has been received on a prior receipt. If this was mistakenly done, be sure to back out the erroneous quantity in the Reject field (i.e. -5)

4.

Receiving Steps: 1 Select Request, 2 Select Receipt, 3 Receive, 4 Additional Info, 5 Summary

Receipt RC600347: PCD60099 - Copy of Logi Ad Hoc Vendor Test-Script 2438

Order ID: PCD60099 Date: Tue, 3 Apr, 2012, 1:32 PM
 Order Title: Copy of Logi Ad Hoc Vendor Test-Script 2438 Processing Status: Receiving
 Supplier: New Ad Hoc Vendor Header Cross Reference: Ad hoc vendor
 Contact: New Ad Hoc V
 My Labels: Apply Labels...

Line Items - Quantity Receiving Needed

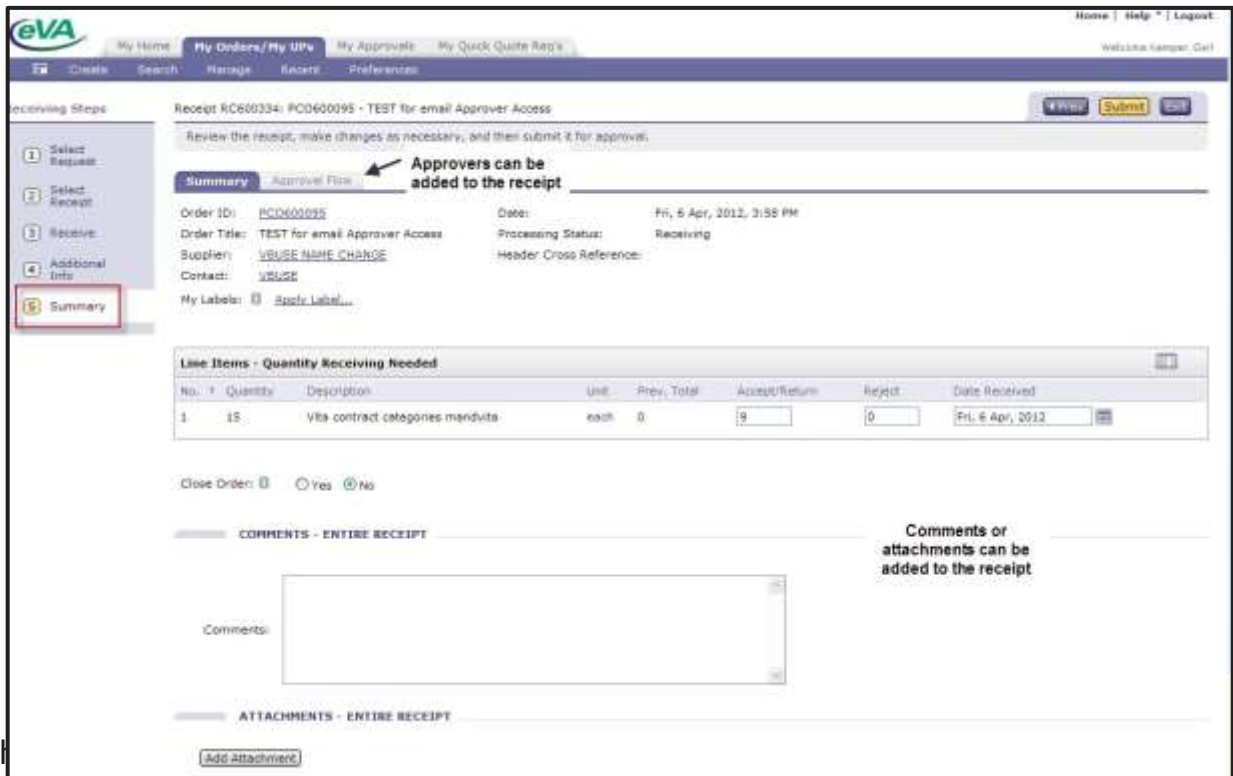
No.	Y	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1		10	Social Director Banquet	each	0	0	5	Tue, 3 Apr, 2012
2		10	Socialites for Banquet	each	0	0	0	Tue, 3 Apr, 2012

Close Order: Yes No

COMMENTS - ENTIRE RECEIPT

After clicking the Next Button for partial receiving, the Summary screen appears.

5. Take the necessary action on the Summary screen, as noted below.



6. Wh

7. Based on your default Preference setup for Receiving, after clicking the SUBMIT button, you will see this screen,



... or this screen.



Let us look at the receipt audit trail!

If partial receiving was done, the requisition would be in "Receiving" status. If all items were received, the requisition status would be in received status.

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains a 'News' section with a welcome message and a 'Old Composing Reqs' link. The main content area has three sections: 'Requisitions - Done - This Month', 'My Documents', and a 'Receiving' status indicator. The 'Requisitions' table lists items with their IDs, creation dates, statuses, titles, and total values. The 'My Documents' table lists documents with their IDs, titles, dates, and statuses. The 'Receiving' status is highlighted in red.

ID	Date Created	Status	Title	Total
PS600718	12/9/2011	Submitted	Copy of ad hoc test for horses	\$230,000.00000 USD
PS600708	12/9/2011	Submitted	Copy of Ad hoc vendor add USA	\$3,400.00000 USD
PS600221	8/9/2011	Submitted	test for comments and attachments	\$60.00000 USD
PS603505-V2	7/22/2011	Submitted	449 Script (create req on behalf of)	\$61,44000 USD
PS608857-V2	4/11/2011	Submitted	CSPL-2815-Contract number list- April 8-2011	\$43.00000 USD

ID	Title	Date	Status
PS601004-V2	New test for Refresh Content - Jan 5 12	4/6/2012	Receiving
PS600797-V2	The Supply Room Co	4/6/2012	Receiving
PS602755	CSPL-4049-Test #2	4/5/2012	Composing
BU7560186	CSPL-3167	4/3/2012	Approved
PS602340	CSPL-3595-on behalf of Bill To test	3/28/2012	Ordered
BU7560186	Desktop PC01_3007 -Banner 74x60px (right hand navigation)	4/28/2012	Approved

When a requisition is partially received, it appears, as well as a NEW receipt in composing status.

NOTE: For partially received orders, the system creates a new composing receipt in preparation for additional receiving.

The screenshot shows a web application interface for a specific requisition, PCO600098-V2. The page title is 'PCO600098-V2 - The Supply Room Co' and the status is 'Receiving'. Below the title, there is a 'Back' button and 'Receive' and 'Print' buttons. The 'Receipts' tab is selected, showing a table of receipts with columns for Receipt ID, Title, Order ID, Order Title, Date, and Status.

Receipt ID	Title	Order ID	Order Title	Date	Status
BC606246	Receipt for PCO600098	PCO600098-V2	The Supply Room Co	Mon, 13 Feb, 2012	Approved
BC600621	Receipt for PCO600098	PCO600098-V2	The Supply Room Co	Mon, 13 Feb, 2012	Approved
BC600819	Receipt for PCO600098-V2	PCO600098-V2	The Supply Room Co	Thu, 23 Feb, 2012	Approved
BC601388	Receipt for PCO600098-V2	PCO600098-V2	The Supply Room Co	Wed, 28 Mar, 2012, 11:51 AM	Approved
BC601389	Receipt for PCO600098-V2	PCO600098-V2	The Supply Room Co		Composing

Reopening Closed Orders

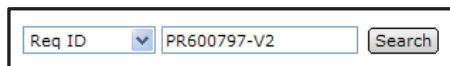
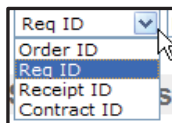
1. Find the order number*, then click the Receive link on the eVA eMail 'My Home' page.



2. When the below screen appears, enter the order number in the Search field, as shown:



If the order number is unknown, a Requisition number (ReqID) or Receipt number (Receipt ID) can also be entered by using the drop down menu to select the alternate search type:



3. When the applicable screen appears, click the 'Reopen Order' button.

Purchase Card Order PC060098-V2: The Supply Room Co

Select a receipt to work on or view. To select an item in the list, click its ID.

This order is currently closed for receiving.
If you need to receive additional items, reopen the order.

Click the Reopen Order Button → [Reopen Order](#)

RECEIPTS - NO APPROVAL NEEDED

Receipt ID	Order ID	Title	Date	Status
RC601346	PC060098-V2	The Supply Room Co	Mon, 13 Feb, 2012	Approved
RC600831	PC060098-V2	The Supply Room Co	Mon, 13 Feb, 2012	Approved
RC600819	PC060098-V2	The Supply Room Co	Thu, 23 Feb, 2012	Approved
RC601388	PC060098-V2	The Supply Room Co	Wed, 28 Mar, 2012	Approved
RC601389	PC060098-V2	The Supply Room Co	Fri, 6 Apr, 2012, 10:27 AM	Approved

Order ID: [PC060098-V2](#)
 Version: 2
 Title: The Supply Room Co
 Supplier: The Supply Room Co
 Contact: Richmond-Terrv Gibson
 Class Order: Open
 My Labels: [Apply Label...](#)

Receipt RC601791: PC060098-V2 - The Supply Room Co

For a receipt, indicate the amount or quantity to accept or reject for each line item, and the date received. If you reject receipt line items, you must provide comments.

Alert: This receipt, when submitted, will close the order for receiving as the Close Order option is set to Yes.

[Accept All](#)

Order ID: [PC060098-V2](#) Date: Fri, 6 Apr, 2012, 10:53 AM
 Order Title: The Supply Room Co Processing Status: Receiving
 Supplier: The Supply Room Co Header Cross Reference:
 Contact: Richmond-Terrv Gibson
 My Labels: [Apply Label...](#)

Click the Summary link

Line Items - Quantity Fully Received

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	11	Ad hoc vendor test	each	11	<input type="text"/>	<input type="text" value="0"/>	Fri, 6 Apr, 2012

Close Order: Yes No

COMMENTS - ENTIRE RECEIPT

Comments:

ATTACHMENTS - ENTIRE RECEIPT

[Add Attachment](#)

5. Click 'Save this request' on the next screen.

The requisition moves to *receiving* status so requisition changes can be made. *Once Receiving has been done, the requisition stays in RECEIVING status even when all quantity has been negatively received {backed out}.*



IMPORTANT RECEIVING INFO

- ✚ Orders in closed status must be reopened before an item, previously received, can be backed out.
- ✚ To accurately process a change to a requisition, the order associated with the change must be first reopened, if applicable.
- ✚ To process a PRICE change on a non-catalog item previously received, it will be necessary to back out all quantities previously received by doing negative receiving on the item(s). NOTE: If the order is in closed status, it must first be reopened. After the price change is made, *Receiving* must be re-done.
- ✚ All quantities backed out on a receipt should be entered as a negative number in the Accept/Return field. (i.e. -10)
- ✚ Receivers are strongly discouraged from closing an order out *short*. An adjustment should be made to the requisition if the item(s) will not be delivered or replaced. If a change requisition is processed to reflect a quantity that equals the adjusted total received, the PR will automatically move to Received status, regardless whether the receiver specified on the last receipt that the order was to remain open.
- ✚ A PR can be cancelled if ALL items previously received on the PR have been completely backed out.
CAUTION: If multiple orders to different vendors exist on the same requisition, canceling the requisition will cancel ALL orders associated with the requisition. Instead, create a change to decrease the quantity on the applicable line item(s) to zero (0).
- ✚ When all items on a requisition are backed out, the requisition remains in *receiving* status and will not revert back to ordered status.
- ✚ New receipts will show the new/adjusted quantity in the "Prev. Total" field.