

Eagle Mobile Receiving Items

As you know, moving items quickly from the receiving room to the sales floor helps reduce lost sales due to empty shelves or hooks, and can improve customer service.

Quick and accurate receiving can lead to a more efficient & productive inventory.

Mobile Receiving is an effective tool that can reduce the time it takes to post receipts and accurately update your inventory.

Its scanning and electronic posting capabilities also saves paper and reduces the potential for posting errors!

Mobile Receiving gives you two ways to receive—by PO and by Item.

In this session, you'll learn how to decide which one to use as well as how to configure the settings for each option.

Then we'll go through each option step by step, including finalizing receipts.

Let's start by configuring the settings.

Topics

- Configure Settings
- Receive by PO
- Receive by Item
- Finalize Receipts

Configure Settings

On the main menu, you will notice that there are two Receiving Options.

This is where you decide which method of receiving you should use.

Typically, if everything on the load is listed on the same purchase order you'll want to receive by PO.

You'll probably want to receive by item, however, if there are multiple purchase orders on a shipment.

Notice that each selection has its own "tools" or 'settings' button.

Let's take a look at the 'tools' for 'Receiving by PO'.

Tapping this button opens the settings for the app.

The choices that you see here are the defaults that were set in Options configurations.

You may modify these defaults, but keep in mind that any changes you make are only in effect for this session.

Once you close out, they revert back to the defaults.

If you find yourself making the same change every time you use the Receiving app, you may want to talk to your manager about changing the default.

Now, down to specifics.

Typically 'Capture UPC's' is set to "Yes"...and more than likely you won't want to change this setting since it allows you to link new barcodes to items as you receive them.

This saves time at Point of Sale by eliminating the need for the cashier to look up or manually key the item number.

Here, you can specify whether or not labels should be printed.

If you are printing labels, you can choose a different style or 'format' of label here and set the quantity of labels that should be printed.

Click "OK" to lock in your changes, or choose "Cancel" to close out of the settings screen without making any modifications.

Look at the settings button for 'Receiving by Item'.

You'll notice two other choices....

You can receive PO's Created in any store or specify a particular store.

You may also make a similar choice in the 'Receiving Store' field which narrows the items that you receive to those that belong to a specific store.

Just as before, select "OK" to lock in your changes...

Once you've checked and, if necessary, configured your settings, you can begin to receive the items that have arrived.

Let's start with Receiving by PO.

Receive by PO

After choosing "Receiving by PO", the "PO Search" window displays.

If you know your PO number, enter it in the first field.

Otherwise, narrow your search by entering the 'Vendor' ID, or position the cursor on the 'Item' field and scan the first item.

Selecting 'Find' with no entries would display all available PO's.

If you searched by a particular 'Vendor', only the PO's for that vendor display.

Entering an 'Item' would further narrow our search to only purchase orders containing that item number.

As you can see, there are many PO's available for Vendor '1' and several columns of information that seem to disappear on the right side of the screen.

Use the scroll bar at the bottom of the list to look at the additional columns or resize them as needed.

You can also expand, or narrow, the columns to expose all of the information, by using your stylus to drag the column dividers.

Choosing the "Next" arrow on the lower portion of the screen takes us to the next page of our list of purchase orders.

Notice that when we move beyond the first page of the list, the 'Previous' button is illuminated allowing us to return to the previous page.

Select the PO you wish to receive by tapping the appropriate line with your stylus.

When you choose a PO from the PO Search window the “Verify PO” window displays, allowing you to make sure that you have selected the appropriate purchase order.

Check the header information.

If you are receiving a multi-store Purchase Order, tap the ‘Store’ hyperlink in the ‘Receiving’ field to select from a list of stores.

After making sure that the correct store and purchase order are displayed, scan a bar code on the first item; or key the item #, UPC, or Manufacturer part number.

If the item you entered is found on the purchase order, the information displays.

Notice the cursor is positioned in the ‘Received’ field with a quantity of ‘1’.

‘Stk’ indicates that the item is being received in the ‘Stocking’ unit of measure.

If the item has a ‘Purchasing’ unit of measure, this field will be underlined, indicating that you may tap the field name to toggle between “Stk” or “Pur” and receive the item in either unit of measure.

The number displayed to the right of the ‘Received’ field indicates the quantity on this purchase ‘Order’.

Items can be scanned as they come off of the truck and the quantity will update incrementally by one, or you can enter a quantity in the ‘Received’ field.

For example a ‘12’ if you receive a full case of a dozen items.

The ‘Cost’ and ‘Retail’ fields can be modified here.

If you do this, they will be updated in the item’s inventory record when the PO is finalized with the appropriate options.

The item description below the item number and the manufacturer’s part number (in ‘Mfg’ field) help you to make sure that you are receiving the correct item.

‘Total Received’(Tot. Rcvd) indicates the unit of measure and quantity of this item received on this PO so far.

As you can see no quantity is indicated yet.

Items that are ‘Committed’ to sales orders are displayed as well as the total ‘Quantity On Order’.

The ‘QOO’ quantity includes other purchase orders as well as the one we are working with.

Tap the right or left arrows on the ‘Line’ field to scroll up or down the lines of the PO.

As you scan or enter items the ‘Tot. Rcvd’ field is updated as shown here.

If you scan an item that is not found on the Purchase Order, you can search for it on another PO by selecting ‘Details’ and ‘P.O. Search.’

If you want to add the item to the current PO, just enter the quantity in the ‘Received’ field and tapping the “+” button.

Keep in mind that you may only add items to a Purchase Order when you are ‘Receiving by PO’, this capability is not available when you’re ‘Receiving by Item’.

Once an item is received, you can tap the printer icon if you wish to print a label.

The “Label Print” screen displays.

Use the drop down to select a ‘Label Format’ if you don’t want to use the default, then enter the ‘Number of Labels’ to print.

Don’t worry if the Label image shown on the screen doesn’t reflect the Label Format you selected.

And don’t worry that the price indicated is \$9999.99...this is simply a placeholder image.

When the label prints, it will reflect the correct format and the item’s current price.

Occasionally we all make mistakes.

Fortunately, Eagle Mobile provides us with a way of making corrections or modifying entries.

If you display the wrong item and do not wish to post it, simply click the ‘C’ or “clear” button at the top of the screen.

Tapping ‘Details’ at the very lower right-hand corner displays a selection window.

You can change units of measure, replace the total quantity you have received, go back to the PO Search screen, Print a label.

This is an alternative to selecting the ‘printer’ icon, or link a new bar code to the item displayed.

Tapping the “Replace Quantity Received” selection changes the total quantity received to the value currently indicated in the ‘Received’ field.

Tapping the “Menu” button on the lower left side allows you to leave the receiving application open while you return to the Mobile Inventory Menu.

Notice the “Runner” icon has replaced the “Tools” button on the menu selection, indicating that the application is still open.

When you’ve received all the items for the PO you are working on, close out of Mobile Receiving by tapping the “OK” button in the upper right.

Receiving closes and you’re back at the main menu.

Receive by Item

Now, let’s look at ‘Receiving by Item.’

Remember this is the method that works best if you have items from several different POs on the same truck.

After opening the app, the first step is to scan or enter the item number.

This brings up any PO that includes this item.

If an item exists on multiple PO’s, simply tap the row of the purchase order you wish to post the quantities to...

Remember to check the store if you have a multi-store system.

The receiving screen for receiving by item is identical to the one that we saw in the ‘Receive by PO’ application, and the posting process is the same as well.

Simply scan each item’s bar code for the most accurate, and fastest way to receive.

If there is no bar code you may enter the item number, or the manufacturer’s part number.

As with Receiving by PO, if you make a mistake and shouldn't have posted an item you've scanned, use the 'clear' key to remove it.

You can also change the total quantity received by selecting that option from the 'details' button.

When you are finished posting receipts click "OK" to close the application.

Finalize Receipts

Before you finalize the receipts that you have posted with your Eagle Mobile, you will want to verify them and make corrections to any errors that you find.

Remember that you can print the Receiving report (RRP) without option 'f' to review your PO on paper.

If you want to review POs for vendors who use Electronic Receipt Posting, you can print an exception report by choosing RRP- Options and selecting 'Z'.

You may also consider looking at exceptions on the Purchasing (MPO) posting grid.

The 'Variance' column makes it easy to see items that differ from the quantities ordered on the PO!

One advantage of using the posting grid to review exceptions is that you can enter corrections and make changes before you update your receipts using RRP!

As you can see, Mobile Receiving allows you to quickly and efficiently receive items. Scanning items reduces the time you spend in receiving, yet results in more accurate records.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298