Receiving Concepts

Receiving purchase orders is an important part of keeping information on your system accurate.

Receiving adds the quantity of delivered items to the quantity on hand in the system, so that you know exactly how many items you have for sale. This accuracy also helps you make future purchasing decisions.

Receiving also updates the costs on your inventory items, which helps you track accurate sales and gross profit figures.

In this course, we show how to access Purchasing and Receiving in the system and describe key fields on the header screen.

We describe methods to lookup a PO for receiving and show how to use the PO Viewer to check order status.

Objectives

- Header Screen
- PO Lookup
- PO Viewer

Header Screen

You can open Purchasing and Receiving from the Eagle Browser by selecting Purchasing and Receiving.

You can also type MPO in the launch bar, and press Enter.

The top portion of the screen identifies the Store, the Vendor, and the P.O. Number.

The lower portion of the screen shows information pertaining to this specific PO, such as the Date Due, Reference Number and Order Type.

If the Backorder field is set to No, the Purchase Order is complete after being received, regardless of whether all of the items were received.

When set to Yes, the PO remains open until all items are received and finalized.

The Buyer's ID indicates who created the Purchase Order.

This is important information if questions come up later. Finally, the Totals section shows the Number of Line Items, the Total Freight, and any Other Charges that may have been incurred.

You can easily check to see if there is a discrepancy between the Total amount here, and the total on the invoice you receive from your vendor.

PO Lookup

There are a couple of ways to look up a PO, or Purchase Order.

The easiest one is to type the P.O. Number in the P.O. Number field and press Enter.

The PO information will populate on the screen.

If the merchandise has arrived, press the Receive button on the Ribbon bar.

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You can also select the Vendor, and then choose the correct PO from the dropdown list.

Doing this limits the list to PO's only created for this vendor.

Just like before, select the Receive button from the Ribbon menu to update your inventory.

To view all of your purchase orders, select View PO from the ribbon menu.

This is called the PO Viewer.

Use the Vendor and Store filters to narrow your search. When you find your PO, click it and press Select.

You'll return to the Purchasing and Receiving header where again, you can opt to receive it.

PO Viewer

The Purchase Order Viewer lets you see a PO's current status.

Open PO's have not yet been received.

When viewing it on the Purchase and Receiving Screen, this is indicated by an F Status, for Final.

If vendors allow backorders, you may have PO's with a Partial Status.

In this instance, some, but not all of the items, have been received.

Partially received PO's only list items that haven't been received.

This status is marked with P on the Header Screen for Partial.

The last type of common PO Status is one In Receipt. These are PO's that are currently being received.

This PO may be partially completed and someone may still be working on it.

PO's in Receipt have a Status of R, for Receipt in Progress.

This means not all items have been finalized on the Receiving Report.

Best Practice is to make sure you have the correct purchase order and are not duplicating someone else's work before editing a PO In Receipt.

You may also come across PO's with a status of X, for Canceled, or T for Temporary.

Recap

Now that you're familiar with the Purchasing and Receiving screen, the process of looking up POs, and how to determine their status, you're ready to use the receiving process.

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About Epicor

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