

# Receiving Merchandise

After you've given a purchase order to a vendor, you wait for the order to arrive.

When it does, you'll check the vendor's packing slip against what you ordered.

Everything might match perfectly, but often there are discrepancies: the cost may have come in higher than expected, or perhaps some items had to be backordered.

You correct these differences when you receive the merchandise.

In this course, we show how to look up a purchase order and describe different types of receiving.

Then we'll show how to post the received items and finish the PO.

## Objectives

- Lookup POs
- Receiving Methods
- Entering Exceptions

## Lookup POs

With MPO open, you're ready to retrieve the purchase order related to the shipment that just arrived.

The quickest way to open the PO, if you know the PO number, is to type a period followed by the number in the vendor box and press Enter.

The PO opens in the Purchasing and Receiving screen.

If you don't know the number, enter the vendor's code or sort name in the vendor box.

Take note, sort names must be preceded by an equal sign.

With the vendor selected, use the drop-down menu to open a list of POs for this vendor, and select the one you want to receive.

Another option, typically used if you don't know the vendor or the PO number, is to select a PO from the PO viewer.

The PO Viewer has the same grid functionality as any other viewer, so it's easy to lookup POs by the creation date, the buyer's initials, or other identifying factors.

With the PO open, select Receive to start the receiving process.

## Receiving Methods

The system has two receipt posting methods: All and Only.

Finalize appears on this menu, but it's only used if All of the merchandise received exactly matches your purchase order.

Selecting Finalize lets you skip the receipt posting, though not recommended.

If most of the items arrived as ordered, with few discrepancies, select ALL as the receiving method for this PO.

Make the few changes necessary to keep your inventory and pricing records current.

If you only received a few items on the purchase order, and need to make changes on most of them, ONLY is the best method.

Use this method when it's necessary to sort through the items individually and enter the received quantities.

## Entering Exceptions

To see how to enter exceptions while receiving a PO, we'll choose All.

Notice that all the items on this PO have the same number in the Quantity on Order and Quantity Received columns.

When receiving All, it's assumed items came in as ordered.

If an item quantity received is different than ordered, double-click the item's line.

The system displays the item information at the bottom of the page where you can enter the actual quantity received.

Press Enter and the system records the new quantity in the grid.

Notice that the system shows the difference in the Variance column.

Don't worry if the stocking unit of measure is different than the purchasing unit of measure; just enter the quantity received in the correct field. \*

If rejecting some of the order, double-click the item to highlight it and choose Flip from the ribbon.

In the item detail section, enter the quantity of the item that you are rejecting, and press Enter.

The system enters the exception in the grid.

You may occasionally receive items that were not in the original PO, but that's OK.

Add them during the receiving process.

To add a new item, enter the SKU and press Enter.

Type the quantity received in the dialog that appears, then make any added changes.

Press Enter again and the system adds the item to the purchase order.

Notice that the expanded item detail shows that you added this item during receiving.

There may be other exceptions to your order.

For example, if an item's cost is different, tab to edit the stocking or purchase unit cost.

While you can enter a specific retail price, you may want to consider just entering the new cost.

If you delete the retail field contents, leaving a blank retail field, the system automatically calculates the new retail price using the new cost and the Gross Profit Percent defined in the system.

When finished receiving the PO, run the receiving report to finalize it.

For more information, refer to Online Help and other courses in Epicor University.

## Recap

Accurately receiving merchandise against purchase orders is critical to the health of your business.

Using the receiving methods in Purchasing and Receiving enables flexibility while ensuring accurate inventory files, which has a positive effect on the rest of your business.

In this course, we showed how to look up purchase orders and described different types of receiving.

We also showed how to post the received items and finish the PO.

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