

Receiving Purchase Orders

Properly receiving the merchandise, you ordered will ensure that your *average* and *replacement cost* along with your quantity-on-hand is correct. Best business practice is to establish standard, well-communicated receiving processes in your business to limit errors and get stock on the shelf quickly.

Objectives

- Reviewing a Purchase Order
- Reviewing Totals and Finalizing

Reviewing a Purchase Order

From the main menu, select *Purchasing* and then click *Purchase Order*. If your default view is *Form View*, select the *Table View* to see a list of all your currently available purchase orders.

In the Purchasing grid, use the search bar to look for a specific PO by name, supplier, or location. To refine your search results, use the following filters. *Purchase orders* with an *open* status are displayed by default.

Check the box to select the *PO* you want to receive and then select the *Receiver* button.

You can choose from the following options to receive the purchase order.

Choose *Selected Items Only* if the supplier has only sent part of the shipment. You will manually select the items you received.

If the supplier has sent *most* of the items in the shipment, choose *All with Exceptions*.

You can then manually update any item quantities that you are not receiving in full.

Choose *All by Totals* to receive all the items on the order.

Let's look at each option's workflow, starting with *Selected Items Only*.

Set the *Receive By* toggle to receive the items in the *Purchasing* or *Stocking* unit of measure.

Check *this* box to select an item and click the *Truck* icon to populate the *QTY Being RECVD* column with the same value as the order quantity.

If you're only receiving a portion of this line, manually enter the value in this field.

Anytime you are on the *Receive Purchase Order* page, you can add *new retail* here.

To print labels, check this box and then click the *Print Labels* button.

Make sure to check the *Allow Backorder* column if you're only receiving a partial quantity of the item and want to receive the rest later.

Select *Save* to save the changes.

When you make changes to a field, a red marker appears in the top left corner, indicating that there are unsaved changes. Select *Save*.

If you were to select *All with Exceptions*, the *QTY Being RECVD* will be set to match the order quantity. Here you can manually update any item quantities that you are not receiving in full. Or, check the box next to the items that need to be adjusted and use the *Clear All* button to set the *QTY BEING RCVD* to zero.

Now, enter the quantity you've received *here*. To receive the remaining units later, check the *Allow Backorder* check box. Select the *Save* button to save the changes you made.

Choose *All by Totals* to receive all the items on the order. Choosing this option will take you to the *Review Totals & Finalize* page, however, you can still make adjustments to the items being received, if needed, by clicking on the *Receive Items* tab.

Reviewing Totals and Finalizing

Now that we have updated the quantity being received, we need to decide how we want to update costs and retail prices. Review the totals and compare them to the invoice or packing slip provided by the supplier in the *Review Totals & Finalize* tab.

Clicking *Supplier Invoice Columns* lets you update any of these values.

Review Finalize Options allows you to view or update the receiving options for items on the purchase order.

Set this toggle to *By Cost* or *By Weight* to calculate the values based on the item's cost or weight.

Let's look at an example when you choose *By Weight*.

Consider a freight charge of \$5 for an item, the heavier the item, the higher the freight charge.

When you opt for *By Cost*, if one widget costs \$1 and another costs \$2, the 2\$ one has a higher freight fee attached to it.

Check this box to distribute any freight charges, discounts, and miscellaneous charges into the cost of the items when you finalize the receipt.

If you've allowed backorders, check this box to prorate any freight charges, total discount, and miscellaneous charges based on the quantity you're *currently* receiving.

If you do not check this box, the full amount is charged to the first receipt and not to future backorder shipments.

Enable this checkbox to update the retail price of the items on the purchase order.

If you changed a product's retail price on the *Receive Purchase Order* page, you must enable this check box for the product's retail price to be updated. The changes will be sent to *Price Review*, where you will be able to print labels if needed.

Do not use this setting if you update your retail pricing via electronic price changes directly from your vendor. You will create new retail prices during that process and print new labels at that time.

Check this box to preserve the highest replacement cost in product maintenance, even if the cost incurred on this purchase order is lower.

For example, if an item's replacement cost is 59 cents but you just received it for 39 cents, the replacement cost will remain 59 cents.

Check this box to update the item's cost based on this purchase order.

This field defaults to the current date. Set the date you're receiving the shipment.
When all the selections are made, select *Save*.

Select *Save and Finalize* to finalize the receipt.

In the confirmation prompt, select *Finalize* or *Print & Finalize* accordingly.

Once you finalize the purchase order, you can check the status of the task in *Task Logs*. From the main menu, select *Utilities > Activity > Task Logs*.

To view the report in detail, check this box next to the line item and select the *Task Log Detail* button.

Changes to the product Quantity, Replacement Cost, Average Cost or Retail Price are logged in the Inventory Transaction Register.

Recap

After creating purchase orders, you need to make sure you get what you ordered, at the agreed-upon price from your supplier. Properly receiving each PO is needed to complete the process.

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