



# Receive A PO Training Manual

Version Date: February 2021

Accountable Author: Jo-Ann Ross





## Table of Contents

How to Print Receiving Documents .....	3
Step 1 – Purchasing Desktop.....	3
Step 2 – Selection Purchasing Reports.....	4
Step 3 – Selecting Specific POs.....	<b>Error! Bookmark not defined.</b>
Step 4 – Selecting Select POs .....	<b>Error! Bookmark not defined.</b>
Step 5 – Confirm your Selections.....	<b>Error! Bookmark not defined.</b>
Step 6 – Print Document.....	<b>Error! Bookmark not defined.</b>



## How to Receive A PO

Please follow the screenshots below to receive a PO

### Step 1 – Purchasing Desktop

In the **Purchasing Desktop**, click on **PO Receive** on the right hand side

The screenshot shows the 'My Tasks' interface in the Purchasing Desktop. At the top, the user is identified as KHANSA01RV with a status of OPEN and a date range of 25/01/21 to 01/02/21. The main area contains a table with columns for Task Description, Dept/Inv, Vendor, Date, Obj. Status, and User. A blue arrow points from the 'PO Receive' option in the 'Process Tasks' sidebar to the 'Task Description' column header. Below the table is a form with fields for Task Number, Type, Status, PO/Req Number, Buyer on PO/Req, Total for PO/Req, Lines, Auto Receive PO from Req, Message, Events for Task, and Error Message. At the bottom, there are buttons for Print Tasks, List Tasks, Send Message, Add Message, ReAssign Tasks, Change Status, Task History, List History, Manage FYIs, and Refresh.

Task Description	Dept/Inv	Vendor	Date	Obj. Status	User

**Process Tasks**

- PO Receive
- Purchase Order
- Cost/Qty Chng
- PO Inquiry
- PO From Inv
- PO From Req
- Check PO Num
- Purchase Reqs
- Req Inquiry
- Req From Inv
- Item Reqs
- Pur Routines
- Other Inquiries
- Contracts
- Bid Worksheet
- EDI
- Reports
- MM/AP Reports
- Custom Reports
- Select
- Scanning
- System Status
- Preferences

**Form Fields:**

Task Number   Type   Status			
PO/Req Number   Buyer on PO/Req			
Total for PO/Req   Lines			
Auto Receive PO from Req			
Message			
Events for Task			
Error Message			

**Buttons:** Print Tasks, List Tasks, Send Message, Add Message, ReAssign Tasks, Change Status, Task History, List History, Manage FYIs, Refresh



## Step 2 – PO Selection

Fill in the fields as shown

- 1 – Select the Purchasing Facility
- 2 – Enter the PO number if you know what it is or use the drop down and select the PO
- 3 – Enter the Packing Slip number for this shipment  
Reminder, this number will be used to match up with the invoice on the AP side so it's important that it is as accurate as possible.
- 4 – Enter the date of the receipt or 'T' for today.
- 5 – From the drop down select how you would like to see the lines on the PO displayed.  
If you select by Line the items will display in the order they were entered on the PO.

MM.ROV - Purchasing Desktop - MM.ROV - Purchasing Desktop - (ROV TEST (N) - Test) - Salma Khan

Facility: GBH.MM      Ship To:      Vendor: CARDINAL HEALTH CANADA IN

PO - 000000003      PO Type: PURCHASE      Amount: 431.40      Lines: 1

---

Purch Facility: GBH.MM  
 Purchase Order: 0000000003 - BACKORDER  
 Type: PURCHASE  
 Vendor: V000000376 CARDINAL HEALTH CANADA INC.

---

Last Line: 1  
 Last Rcpt: 17/02/21

---

\*Packing List: 17/02/21-003

---

\*Receive Date: 24/02/21  
 \*Sort Order: LINE NUM

---

Sort Num	Line	Item Num	Dept/Inventory	*Units	Qty Rec	Back Ordered
1	1	006317	30701310200...	CA		Y

---

Comment:        
 Description: CATHETER URETHRAL 10 FR  
 Packaging: CA/100 EA  
 Allergen/Hazardous:     

---

VEN CAT #  
 MFR CAT #  
 ITEM NUM  
 LINE NUM

---

Line Information      Enter Asset/Serial Number      Cancel      OK



### Step 3 – Enter Quantities Received

You can now select the line / item you are receiving.  
Confirm the unit of purchase matches your receipt.

Enter the quantity received.

Sort Num	Line	Item Num	Dept/Inventory	*Units	Qty Rec	Back Ordered
1	1	005432	03071135400...	EA	2	
2	2	002917	03071135400...	EA		
3	3	005432	03071135400...	EA		
4	4	005432	03071135400...	EA		

  

Comment	
Description	MISC NON MED EQUIP
Packaging	EA
Allergen/Hazardous	

  

Line Information    Enter Asset/Serial Number    Cancel    OK

### Step 4 – Additional Line Item Information

If you require more information on an item there are a couple of things you can access depending on what you need.

1 – Click on ‘Line Information’ at the bottom of the screen and you will see a pop up screen

Receiving Line Information Display

Purchase Order	000000009 OPEN
Vendor	M0000458 STERIS CANADA LIMITED
Line Num	1
Item Num	005432
Description 1	MISC NON MED EQUIP
Description 2	
Common Name	
Category	EQUIMIN
Vendor Cat	P764071001
Mfr	
Mfr Cat	
GL Account	03071135400000.7100000
Invoice/Dept	030711354000000
Tax Code	HST
Additional Desc	1 KIT VALUE REPAIR 1 PR
Additional Desc	2
Additional Desc	3
Item Packaging	EA
Pur Units	EA
Receiving Units	EA
Quantities (Receiving Unit;Smallest Unit)	
Ordered	4
Received	0
Cancelled	0
Left	4

Close

Or

2 – Use the drop down available on the Qty

You will see a Message showing

What was Ordered, already Received and what is on Backorder

Message

ORD: 4 RCV: 0 CAN: 0 COST: 252.9800

Close

### Step 5 – Line / Item Comments



You have the ability to add a comment to an item. This is free text for each item and can be used to note a shortage or damage or a problem with a shipment.

Sort Num	Line	Item Num	Dept/Inventory	Units	Qty Rec	Back Ordered
1	1	005432	03071135400...	EA	2	
2	2	002917	03071135400...	EA		
3	3	005432	03071135400...	EA		
4	4	005432	03071135400...	EA		

  

Comment	FREE TEXT - If you need to make a comment - damage or shortage..!
Description	MISC NON MED EQUIP
Packaging	EA
Allergen/Hazardous	

### Step 6 – Complete Receiving

Continue to receive all of your items and once finished click 'OK'

Sort Num	Line	Item Num	Dept/Inventory	Units	Qty Rec	Back Ordered
1	1	005432	03071135400...	EA	2	
2	2	002917	03071135400...	EA		
3	3	005432	03071135400...	EA		
4	4	005432	03071135400...	EA		

  

Comment	FREE TEXT - If you need to make a comment - damage or shortage...
Description	MISC NON MED EQUIP
Packaging	EA
Allergen/Hazardous	

  

Line Information   Enter Asset/Serial Number   Cancel   OK