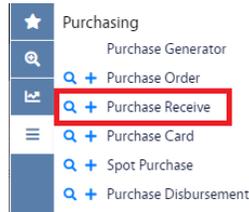


Purchase Order Receiving

Purchase Orders are used to purchase materials from Contractors (vendors). Purchase Orders with a status where the Status Flag is Finalized can be received.

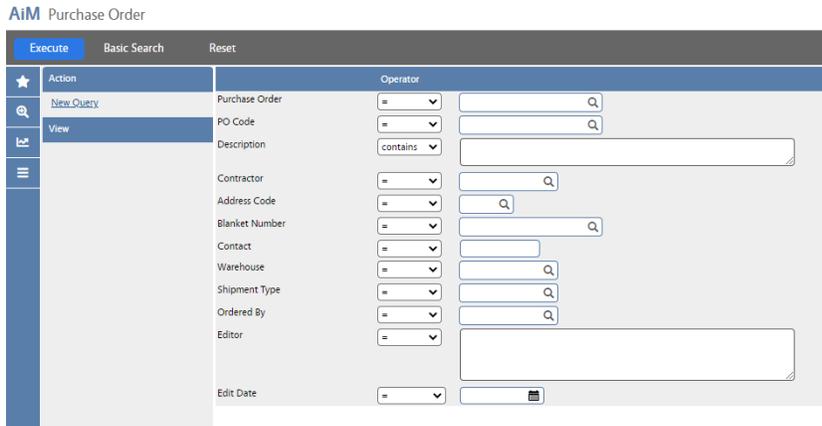
1. There are two ways to start a Purchase Order Receiving; from the Purchase Receive application or the Purchase Order application.
2. **OPTION 1:** From the menu, under **Purchasing – Purchase Receive**



a. Click Purchase Receive hyperlink and then click 

Note: Do not click SEARCH here. Go to the next step to find the issued Purchase Order.

b. Alternatively, you can click  from the menu.



c. Fill in the search screen to find the Purchase Order you want to do the receiving for and then click 

Commented [CP1]: we are adding the quantity in the in the description the rejection not in the header.

Commented [CP2]: click new to find the po that need to be received and then enter the po#

Commented [CP3]: Missing instructions on how to attach packing slip

Commented [CP4R3]: add screenshot of Disburse the order

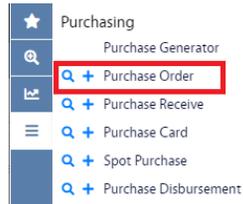
AIM Purchase Order

Search Cancel

Purchase Order	Description
10023456789	AUTO-GENERATED PO
10098789	LIGHT FIXTURE
A001008	AUTO-GENERATED PO
A001010	
A001027	AUTOMATED INVENTORY REORDER
A001042	AUTO-GENERATED PO

d. Click the Purchase Order hyperlink to select the Purchase Order.

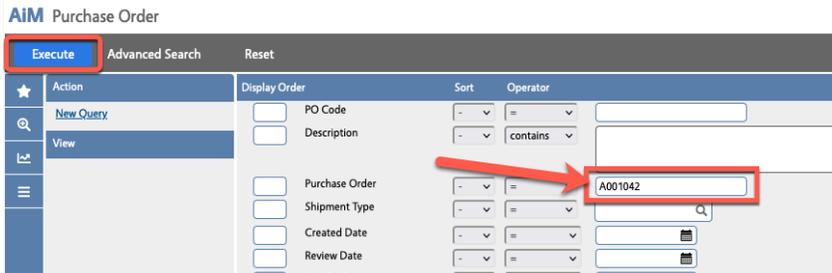
3. **OPTION 2:** From the menu, under **Purchasing – Purchase Order**



a. Click Purchase Order hyperlink and then click 

i. Alternatively, you can click  from the menu.

b. Enter the criteria needed to find the Purchase Order

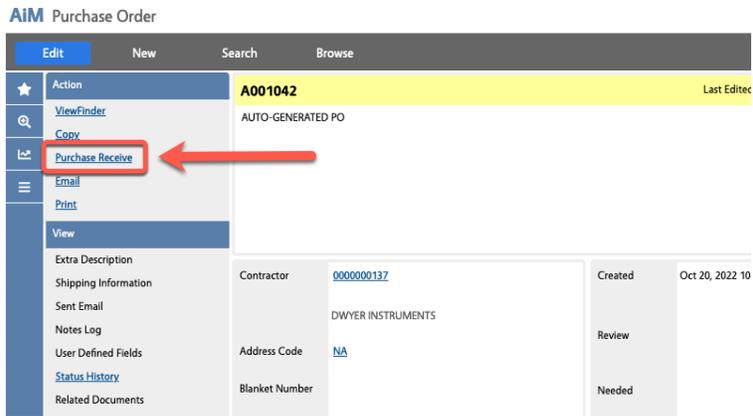


and click 

c. Find the Purchase Order you need to update and click the PO Code hyperlink.

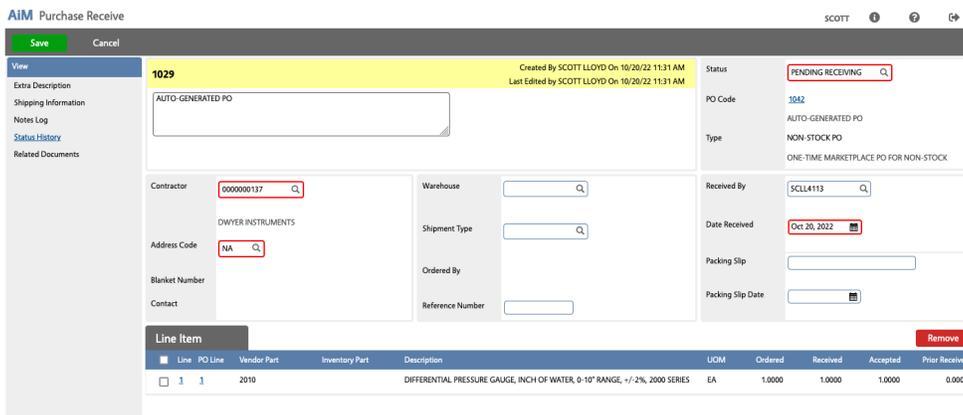
AIM Purchase Order SCOTT  

Action	PO Code	Purchase Order	Description	Status	Contractor	Address Code	Market Number	Contact	Warehouse	Shipment Type	Ordered By	Editor	Edit Date
	3002	A001042	AUTO-GENERATED PO	PO ISSUED	000000137	NA					SCL4113		Oct 20, 2022 11:12 AM



d. Click the Purchase Receive hyperlink.

4. Once you have found the Purchase Order, you can start the receiving.



5. Update any of the fields that need additional information. For example,

- a. Description
- b. Warehouse
- c. Packing Slip Number and Date

AIM Purchase Receive SCOTT

Save Cancel

View **1029** Created by SCOTT LLOYD On: 10/20/22 11:31 AM Status: **PENDING RECEIVING**
 Last Edited by SCOTT LLOYD On: 10/20/22 11:31 AM

Extra Description: **AUTO GENERATED PO**
DIFFERENTIAL PRESSURE GAUGE - DWYER INSTRUMENTS

Shipping Information: PO Code: 3882
 Notes Log: AUTO GENERATED PO
 Status History: NON STOCK PO
 Related Documents: ONE-TIME MARKETPLACE PO FOR NON-STOCK

Contractor: 000000137 Warehouse: STORES
 DWYER INSTRUMENTS STORES WAREHOUSE
 Address Code: NA Shipment Type:
 Blanket Number: Ordered By:
 Contact: Reference Number:

Received By: SCL4113
 Date Received: Oct 20, 2022
 Packing Slip: 649190041
 Packing Slip Date: Oct 18, 2022

Line	PO Line	Vendor Part	Inventory Part	Description	UOM	Ordered	Received	Accepted	Prior Received
1	1	2010		DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 0-10" RANGE, +/-2%, 2000 SERIES	EA	1.0000	1.0000	1.0000	0.0000

6. If a quantity other than what was ordered is received, click the hyperlink for the appropriate Receiving Line Item.

Line	PO Line	Vendor Part	Inventory Part	Description	UOM	Ordered	Received	Accepted	Prior Received
1	1	2010		DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 0-10" RANGE, +/-2%, 2000 SERIES	EA	1.0000	1.0000	1.0000	0.0000

AIM Purchase Receive Line Item SCOTT

Done Cancel

View **1** Last Edited by SCOTT LLOYD On: 10/20/22 11:31 AM PO Line: 1

Extra Description: Vendor Part: 2010 Inventory Part: UOM: EA UOM: EACH
 Related Documents: Unit Cost: \$75.5900 Unit Cost: \$0.0000
 Issue Factor: 1.0000 Stock Quantity: 1.0000
 Order Quantity: 1.0000

Quantity	Prior Receives	Disbursed	Received	Rejected	Quantity Remaining
2.0000	0.0000	0.0000	1.0000	0.0000	0.0000

Rejections: Sequence Rejection Description Quantity Editor Editor Edit Date

If the ordered quantity does not match the received quantity, adjust the **Quantity** to match the actual number received. You can chose to Reject extras or accept them.

7. If there are Rejections, click **Add**

AIM Rejection SCOTT

Done Add Cancel

Transaction: 1029
 Line: 1
 Description: AUTO-GENERATED PO
 DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 0-10" RANGE, +/-2%

Rejection: [Search]
 Quantity: [Input]

8. Enter a description and the **Rejection** reason by clicking **Q** and select the rejection reason.

AiM Rejection

Rejection Reason ↓	Description
DAMAGED	DAMAGED
OTHER	OTHER
WRONG PART ORD	WRONG PART ORDERED
WRONG PART REC	WRONG PART RECEIVED

9. Enter the **Quantity** being rejected.

The screenshot shows the 'AiM Rejection' form. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below this is a header bar with '1' and 'Last Edited by SCOTT LLOYD On 10/20/22 11:46 AM'. The main area contains a text box with 'RECEIVED ONE TOO MANY. SENDING IT BACK.' To the right, there are fields for 'Transaction' (1029), 'Line' (1), and a description: 'AUTO-GENERATED PO DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 0-10" RANGE, +/- 2%'. Below this is a 'Rejection' dropdown menu with 'OTHER' selected. At the bottom, there is a 'Quantity' input field with the value '1' circled in red.

10. Click



The screenshot shows the 'AiM Purchase Receive Line Item' form. At the top, there are buttons for 'Done' and 'Cancel'. Below this is a header bar with '1' and 'Last Edited by SCOTT LLOYD On 10/20/22 11:31 AM'. The main area is divided into several sections: 'Extra Description', 'Related Documents', 'Vendor Part' (2010), 'Inventory Part', 'UOM' (EA), 'Unit Cost' (575.5900), 'Issue Factor' (1.0000), 'Order Quantity' (1.0000), 'Prior Receives' (0.0000), 'Disbursed' (0.0000), 'Quantity' (2.0000), 'Received' (1.0000), 'Rejected' (1.0000), and 'Quantity Remaining' (0.0000). At the bottom, there is a 'Rejections' table with columns for 'Sequence', 'Rejection', 'Description', 'Quantity', 'Editor', and 'Edit Date'. The table contains one row with '1', 'OTHER', 'RECEIVED ONE TOO MANY. SENDING IT BACK.', '1.0000', 'SCLL4113', 'SCOTT LLOYD', and 'Oct 20, 2022 11:46 AM'. The 'Quantity' field in the main area is highlighted with a red box. The 'Done' button at the top left is highlighted with a grey box.

11. Click



The screenshot shows the 'AIM Purchase Receive' form. At the top, there are 'Save' and 'Cancel' buttons. The form is titled '1029' and includes a sidebar with options like 'View', 'Extra Description', 'Shipping Information', 'Notes Log', 'Status History', and 'Related Documents'. The main content area is divided into several sections: 'Contractor' (000000137), 'Warehouse' (STORES), 'Address Code' (NA), 'Blanket Number', 'Contact', 'Shipment Type', 'Ordered By', 'Reference Number', 'Status' (PENDING RECEIVING), 'PO Code' (1042), 'Type' (AUTO-GENERATED PO, NON-STOCK PO, ONE-TIME MARKETPLACE PO FOR NON-STOCK), 'Received By' (SCLL4113), 'Date Received' (Oct 20, 2022), 'Packing Slip' (6499190043), and 'Packing Slip Date' (Oct 18, 2022). At the bottom, there is a 'Line Item' table with columns for Line, PO Line, Vendor Part, Inventory Part, Description, UOM, Ordered, Received, Accepted, and Prior Received. The table contains one row with values: 1, 1, 2010, DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 0-10" RANGE, +/- 2%, 2000 SERIES, EA, 1.0000, 2.0000, 1.0000, 0.0000.

12. When everything is complete, set the **Status** to with a status flag of Finalized.

This screenshot is identical to the previous one, but the 'Status' field is now set to 'FINALIZED'.

13. Click 

14. You are now ready to Disburse the order.