High Level Description

Process: Lookups and Comments
Module: Receiving
Document Type: Business Process Guide

Revision Control

<table>
<thead>
<tr>
<th>Date</th>
<th>By</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>06-19-2009</td>
<td>M Walker</td>
<td>Document created</td>
<td>7</td>
</tr>
</tbody>
</table>

Table of Contents

Table of Contents ................................................................................................................................. 1
Overview .................................................................................................................................................. 1
Lookups and Comments .............................................................................................................................. 2
View Requester, Location etc .................................................................................................................. 2
Find Location ........................................................................................................................................ 5
Find Receipts by PO Number Live or Cancelled Receipts ......................................................................... 6
Review PO Header Comments .................................................................................................................. 7
Whom to Contact for Help? .................................................................................................................... 7

Overview

Brief overview of module processes.
Lookups and Comments

View Requester, Location etc

Navigate to Purchasing > Receipts > Add/Update Receipts

The Receiving page displays.

1. Click Find An Existing Value tab

Locating a receiver when PO is known.

2. Enter 10 digits PO Number
3. Click Search
The Search Results page displays.

Note: This gives you all the receivers for that PO including Date and person who received.

4. To locate a detail select the receiver you wish to look at and click it

The Receiving page displays.

Note: Receipt Lines will give the number of items received.

Note: Optional Input will give the date, time and person who entered information.

Note: Add Comments is used to explain delivery, package problems, etc.

5. Click Add Comments link
6. Enter comment. Explain why item is being held, etc.
7. **Spell Check** if necessary
8. Click **OK**

The Receiving page displays.
9. Note that **Add Comments** Link has changed to **Edit Comments**
10. Click **Save**

You will receive this message.
11. Click **OK**

The Receiving page displays.
12. You are now returned to your main Receiving Screen
13. If a comment exists on the PO, you can read it by going to **Source Information**.

14. If the cartoon bubble is clear, there are no comments. If it has something inside the bubble, click it.

The Purchase Order Comments page displays.

This will often give you delivery contact or location information.

**Find Location**

1. Use the same screen
2. Scroll Down to **More**
3. Use **Pull down**
4. Select **Distribution Information**
Find Receipts by PO Number Live or Cancelled Receipts

Navigate to Purchasing > Shipments > Review Shipment Information > Receipts

1. Enter PO # (add zeros but do not have to count to 6, they will fill out to correct amount)

The Search Results page displays.

2. Three receipts are shown for this PO

3. Scroll to the right and you can see if it has been Received or Cancelled

Received receipt displays.

4. Scroll to bottom of screen to Return to Search

5. Look at the next line if necessary
Review PO Header Comments

1. Before scrolling down to Save, click the PO Header Comments

   The PO Header Comments page displays.

2. The buyer will leave comments here for Receiving

3. If the PO had a Change Order, the comments made on the Change Order will be on the second page

Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).