Goods Receipting

Overview

Subject to permissions, goods that you have placed an order for, can be receipted from the home page. Alternatively, goods can be receipted on behalf of other individuals who have placed an order from the purchase request enquiry.

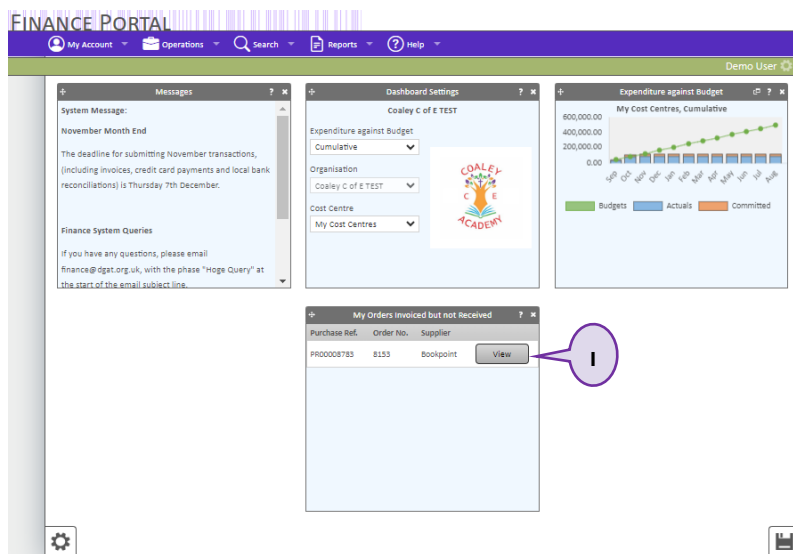Should goods not be acceptable, for example broken or not the right item, they can be disputed.

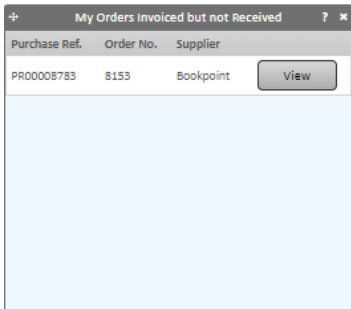Disputing goods puts the invoice and subsequent payment on hold.

Goods receipting **must not take place in advance of goods being receipted**. If goods are receipted on the system in advance of them arriving and being checked for their state of use, then there is a danger of items being paid for when goods have not been received or of the right quality.

Goods Receipting via Home Page
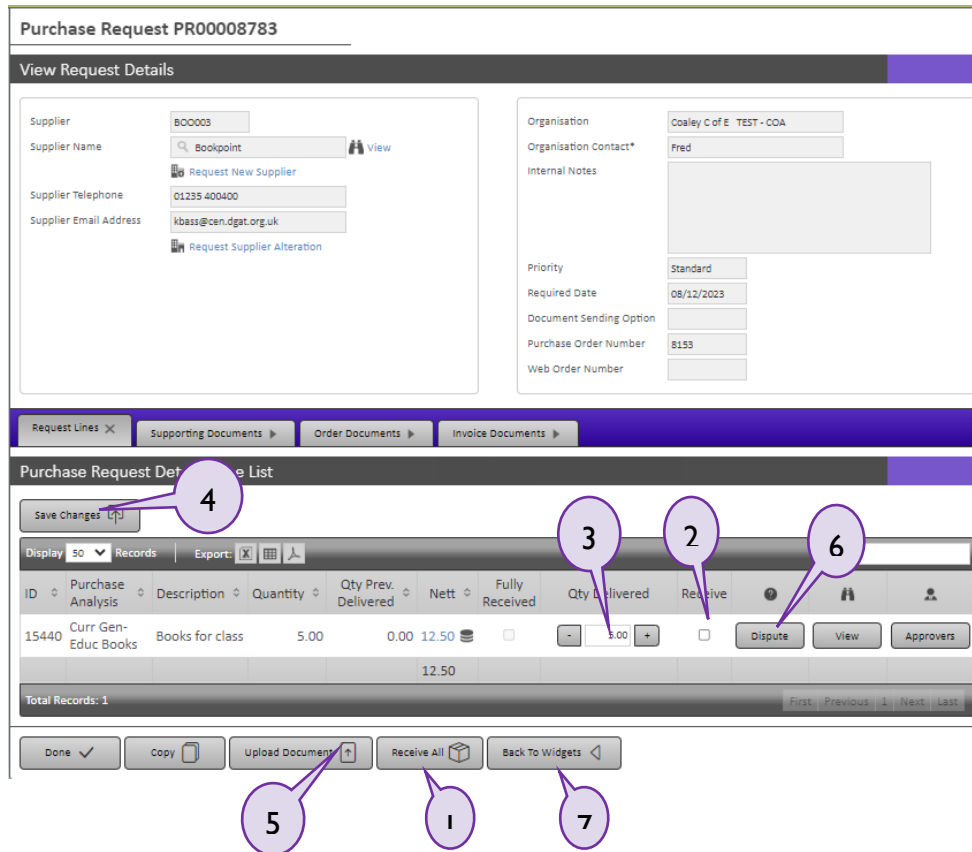
1.1. Menu

Home Page – My Orders Invoiced but not Received

Step	Description
I	Click on [View] to see the order details.

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1.2.   Purchase Request Details

The [View] option displays the purchase request details. Only receipt items if you know they have arrived and are in good working order.

If receipting occurs ahead of when goods arrive, there is a danger of items being paid for when goods have not been received or are of the right quality.
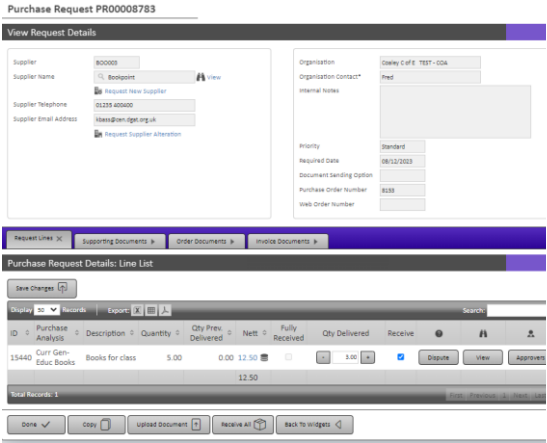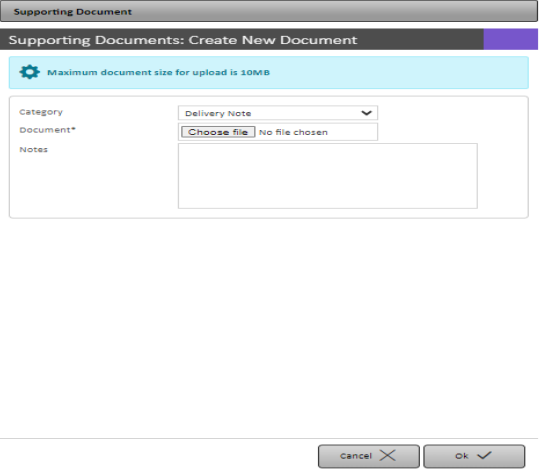
| Step	Description
1	[Receive all] receipts everything on the order. If this option is selected a message will be displayed. Confirm this is required with [Yes] or cancel with [No]. On confirmation that all goods have been receipted a message with the results is displayed. Click [OK].
2	For partial receipts, check the receive box, which then makes available the quantity received field.

Step	Description	
3	For partal receipts, enter the quantity received. The '+' and '-' either side of the quanity can also be used to change the quantity of goods delivered. Please do not over receipt goods. If goods have been over receipted please contact the central finance team. The option to change delivered quantities is available after the receive box (point 2) is checked.	
4	[Save changes] saves the receipt details that have been entered.	
5	A copy of the goods receipt note can be added to the system. Use the [Upload document] button to open the screen to add the documents. Select the 'Delivery Note' as the category (document type), then [Choose file] to browse and select the copy of the delivery note. When scanning in copies of delivery notes, please create a single pdf file for each delivery note.	
6	Click [Dispute] in order to do dispute the order, for example if the goods delivered were of poor quality.	
7	[Back to widgets] will return you to the home page.	

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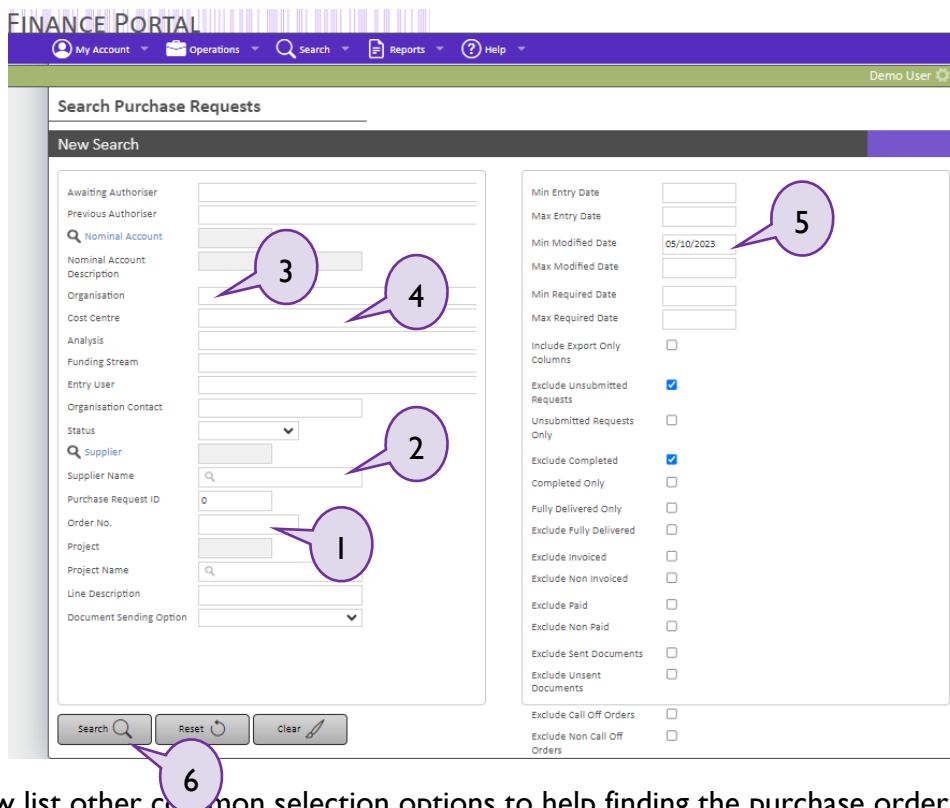
2. Goods Receipting via Menu

2.1. Menu

Search – Purchase Requests/Orders – Purchase Requests

Goods receipting is also available from the menu option.
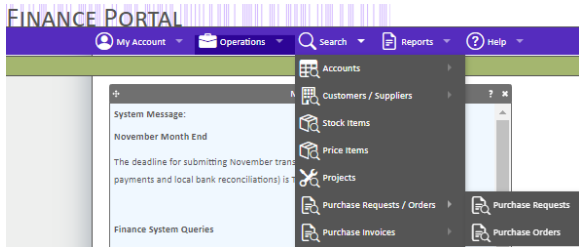
2.2. Finding the Purchase Order

The quickest way to retrieve the order to be receipted is by entering the 'Order No' followed by [Search].


The table below list other common selection options to help finding the purchase order for which the goods or services are to be receipted.

Step	Description
1	Enter the purchase order number if known then [Search].
2	Enter the supplier name. Start typing the supplier name in the field, then the system will display the list of available supplier. Make sure the supplier name is displayed then [Search].
3	Enter the school that the purchase order relates to, before selecting [Search].

Step	Description
4	Enter the cost centre that the purchase relates to, then [Search].
5	If it is an old order, change the date to an earlier date, before selecting [Search]
6	[Search] field to extract the data. Please make sure you have at least one item in the selection criteria.

2.3. Search Results

The option below illustrates the search results for a single supplier.
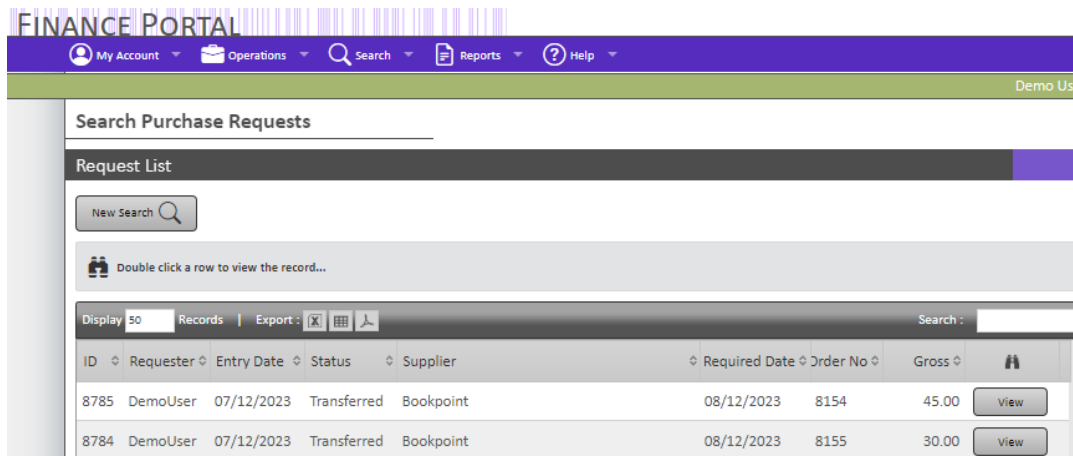
Step	Description
1	[View] to see the details of the order and be able to receipt goods against that order.

3. Partial Receipting of Goods

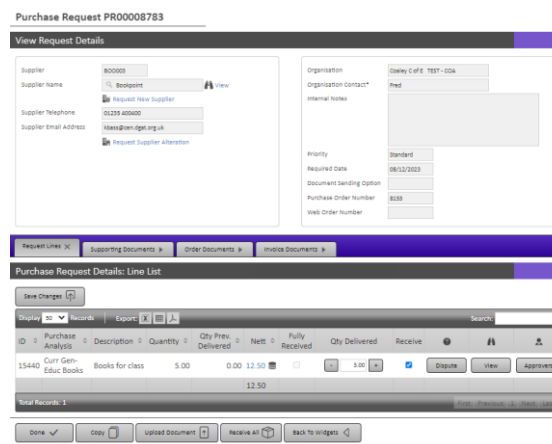Goods can be partially receipts from the screen as located in section 2.

To partially receipt goods, the action to 'receive goods' will need to be 'checked' before the quantity of goods that have been received are added.
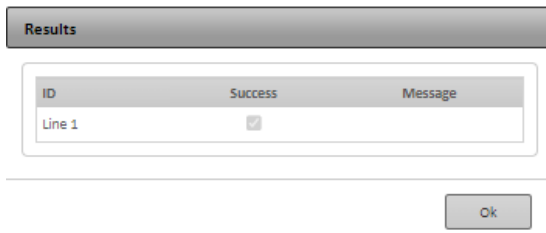
Updates that are entered on the system will need to be saved.
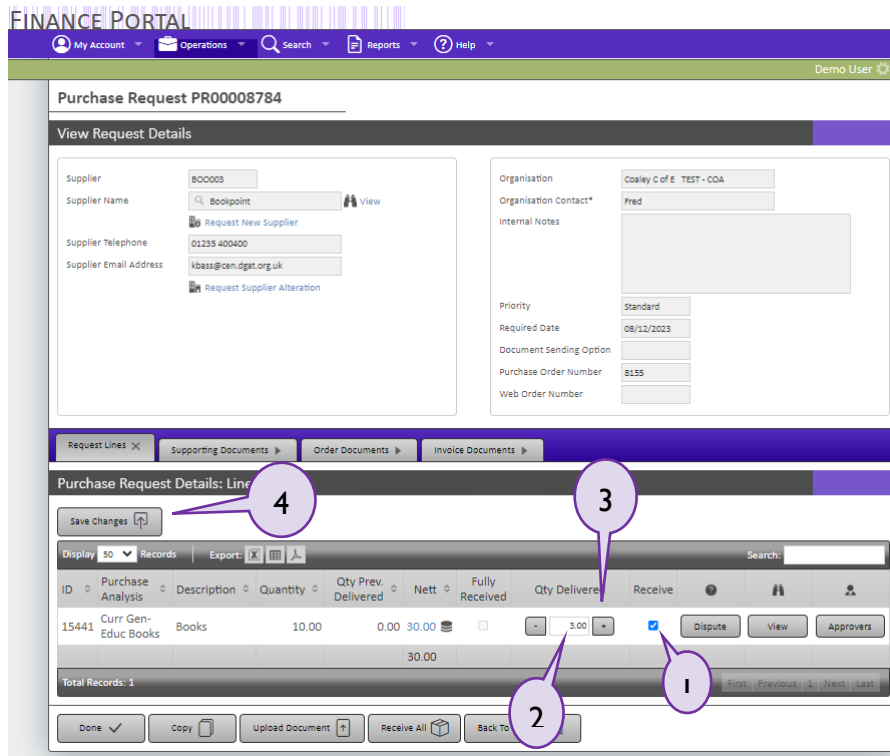
Following the update, the system will show how many goods have previously been receipted.

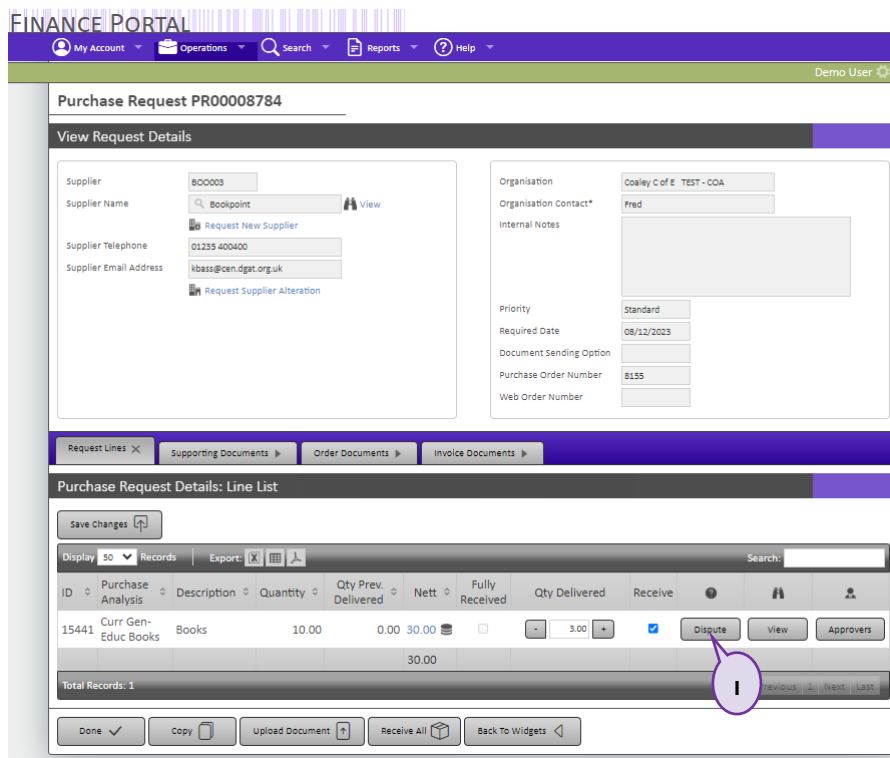| Step	Description
1	For partial receipts, check the receive box, which then makes available the quantity received field.
2	For partal receipts, enter the quantity received. The '+' and '-' either side of the quanity can also be used to change the quantity of goods delivered. Please do not over receipt goods. If goods have been over receipted please contact the central finance team. The option to change delivered quantities is available after the receive box (point 2) is checked.

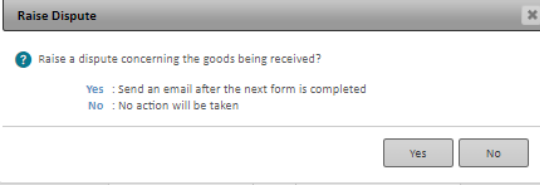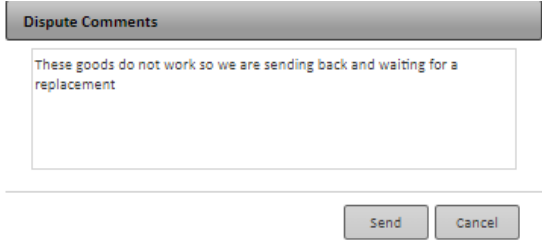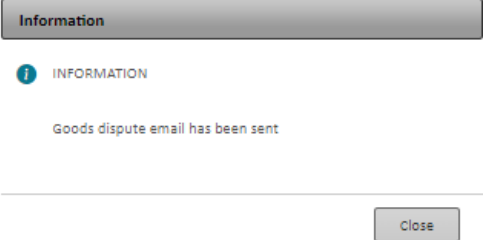| Step	Description	
3	[Save changes] saves the receipt details that have been entered. A message will be displayed to confirm this. Clinck on the [OK].	

4. Disputing the Order/Goods Receipt

Goods can be annotated with dispute information from the screen as located in section 2.

If there is something wrong with the goods delivered, then do not receipt them. A query can be added to show that the goods are in dispute.


Step	Description
1	Select [Dispute] to raise a query on the order.

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Step	Description	
2	Either confirm that a query/dispute needs to be raised, [Yes] or cancel the request by selecting [No]	**Raise Dispute** ✕ Raise a dispute concerning the goods being received? Yes : Send an email after the next form is completed No : No action will be taken [Yes] [No]
3	Add comments to explain the query. The comments will be included in the email that is sent to the schools administrator to sort. Click [Send] when complete.	**Dispute Comments** These goods do not work so we are sending back and waiting for a replacement [Send] [Cancel]
4	A confirmation that an email is sent to the schools administrator is displayed. Click on [Close] to clear.	**Information** ⓘ INFORMATION Goods dispute email has been sent [Close]

5. Receiving Goods on Behalf of Others

Search – Purchase Requests/Orders – Purchase Requests

Provided the user has permissions, goods can be receipted on behalf of another, for example absence due to ill health.
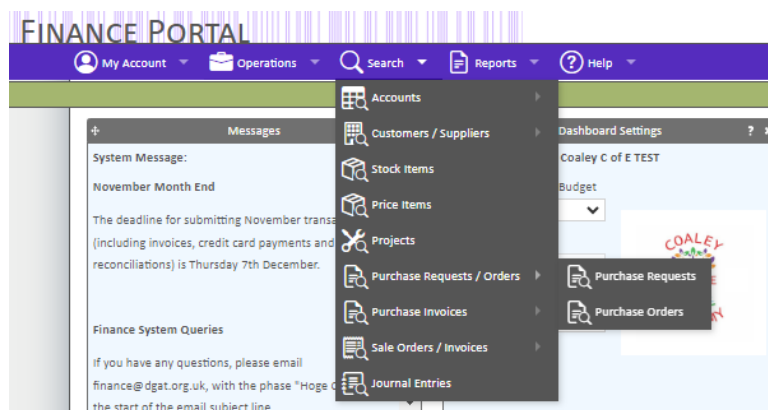
The steps needed are identical to 2- Goods Receipting via Menu.

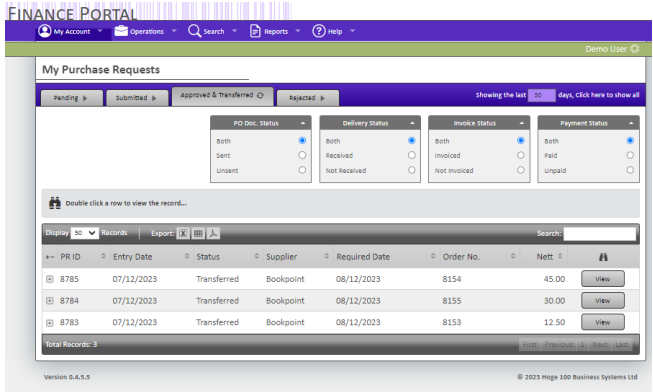# 6. Goods Receipting via My Purchase Request

6.1. Menu

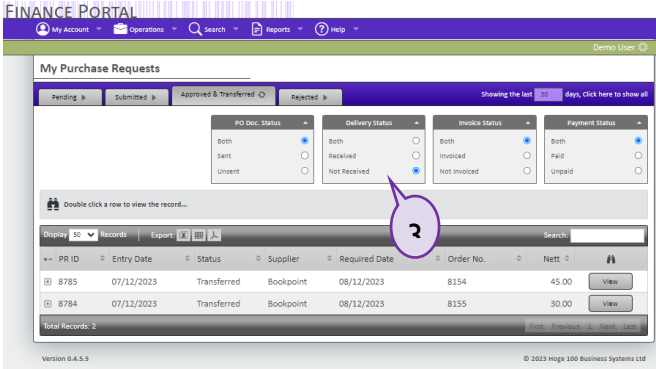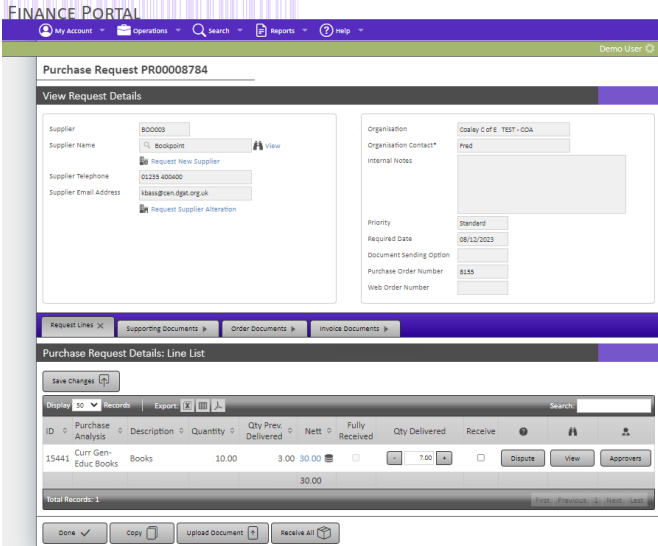*Search – Purchase Requests/Orders – Purchase Requests*

Goods receipting is also available from the My Purchase Requests. This only relates to the requests that you have entered on the system.

6.2. Approved and Transferred

On accessing the 'My Purchase Requests' , you will need to move to the 'Approved and Transferred' tab.
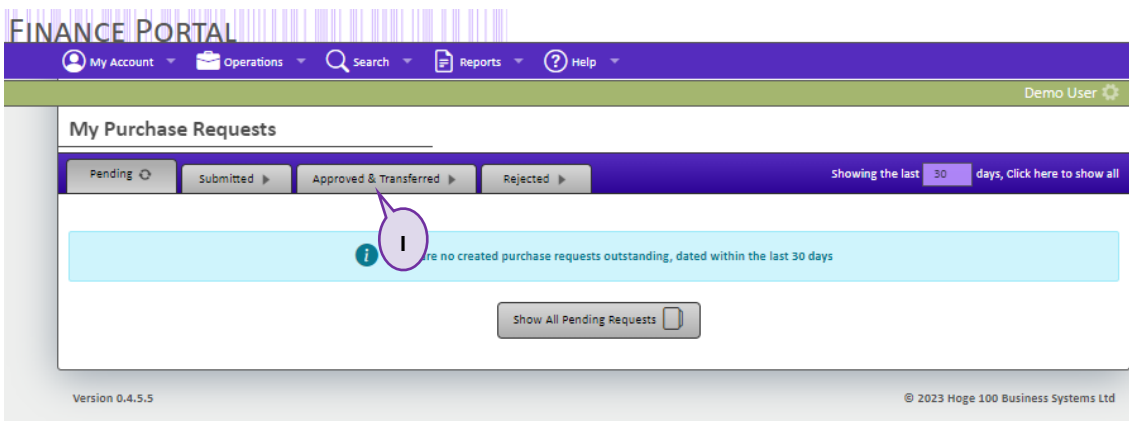
Step	Description	
1	Select the 'Approved and Transferred' tab.	
2	The tab will be displayed with multiple selection criteria.	

Step	Description	
3	Selet 'Not received' on the Delivery Status box	
4	Click on [View] to see the order line details.	

Receiving the goods, adding the delivery note and disputing the items is as previous sections.