



Texas Skyward User Group Conference

Purchasing: Receiving

John Golden



Purchasing: Receiving



Going paperless with receiving can make your process even more efficient. This session reviews the receiving process, including options for notifying the Accounts Payable person to changes in receiving.

- Receiving Entry Options under Configurations
- How to add a Receiving Record from a Purchase Order
- How to setup and use the PO Items Received Report
- How to use Pending Receiving

There are two Receiving Entry Options available.

Receiving Entry Options - WF\PU\PS\CF\EO - 9145 - 05.16.02.00.10 - Internet Explorer

Receiving Entry Options (82)

Receiving Entry Options

Allow the Receiving Date to be changed.
 Display PO's entered by current User only

Fixed Asset Purchasing and Receiving Entry Options

Do not allow Fixed Asset entry on Purchasing Requisitions.

- Enter Fixed Asset data by Account Distribution.
- Enter Fixed Asset data by Detail Line Item.

Allow Receiving Entry to flag items as Fixed Assets.

- During Receiving, if a PO Detail Line Item unit cost is greater than flag the item as a Fixed Asset.
- Require valid Site and Building entry for items flagged as assets.
- Build multiple individual Asset records when multiple quantities are received.
- Build a Single Asset with total quantity when multiple quantities are received.

Schedule Processes

Schedule Build Assets from Receiving records [Parameters](#) [Edit](#) [Run Now](#)

Click add will allow you to receive.

Receiving - WF\PU\PR\RC - 10746 - 05.16.02.00.10 - Internet Explorer

Skyward School District

Oliver Brieflyscr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

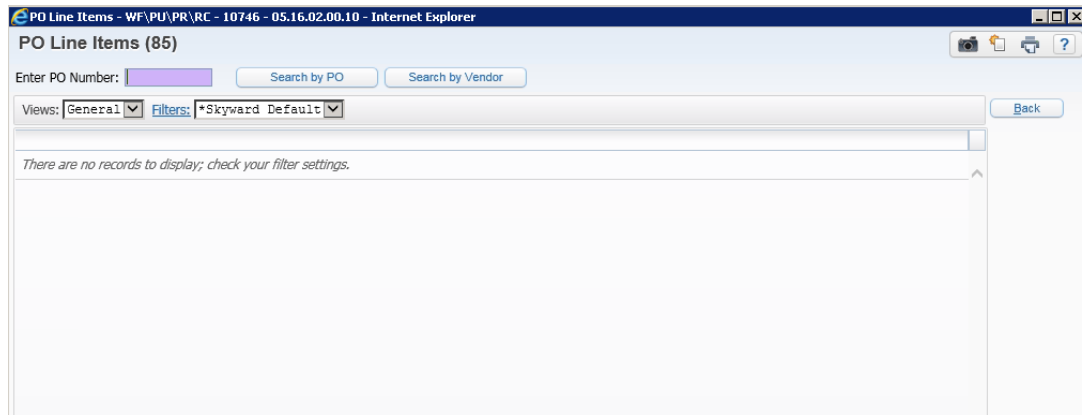
Receiving (498)

Views: General Filters: Skyward Default

Date	Time	PO Number	Batch Number	PO Status	BP	Catalog	Description	Unit Desc	Quantity	Vendor	BP \$ Received
05/25/2016	12:44 PM	0001600027	tm	O			15 Boxes of Red Pens	BOX	10.00	STAPLES	0.00
05/24/2016	8:51 AM	0001600026	TM	H			10 Cases of 20 reams of paper	CASE	10.00	STAPLES	0.00
05/20/2016	3:59 PM	0001600025	19	H			250 PACKS OF PLASTIC WARE	PACK	250.00	Wal-mart stores i	0.00
05/20/2016	3:59 PM	0001600025	19	H			250 PACKS OF PAPER PLATES	PACK	250.00	Wal-mart stores i	0.00
05/20/2016	3:57 PM	0001600024	19	H			10 boxes bathroom door hinges	BOX	10.00	A-one aluminium d	0.00
05/04/2016	1:50 PM	0001600022	TM	O			10 BUNDLES SALE ON HIGHLIGHTERS/PENS	BUNDLE	10.00	STAPLES	0.00
04/21/2016	3:29 PM	0001600020	TM	H			One hundred reams of copy paper	REAM	100.00	STAPLES	0.00
01/28/2016	3:39 PM	3031500002	hm	H			Boxes of markers	boxes	10.00	ABC School Supply	0.00
09/11/2015	4:07 PM	3031500003	hm	H			Boxes of markers	boxes	1.00	ABC School Supply	0.00
09/11/2015	4:05 PM	3031500003	hm	H			Boxes of markers	boxes	4.00	ABC School Supply	0.00
09/11/2015	3:53 PM	3031500002	hm	H			Boxes of markers	boxes	5.00	ABC School Supply	0.00
07/31/2015	10:39 AM	3031400002	hm	H			Boxes of markers	boxes	5.00	ABC School Supply	0.00
07/22/2015	3:26 PM	2021500005	02	H			3 Extra Buses needed for the annual science exhibit.	EACH	3.00	A big bus co incs	0.00
07/13/2015	3:02 PM	2021500011	13	H			Riding Lawnmowers	EACH	3.00	Amx distribution	0.00
07/13/2015	3:02 PM	2021500011	13	H			Lawn fertilizer	EACH	7.00	Amx distribution	0.00
07/10/2015	10:26 AM	2021500008	10	H			adfad		50.00	A & f trophy cosc	0.00
07/01/2015	3:55 PM	2021500000	hm	H			Party Supplies - balloons, banners, etc.	Box	50.00	Abc restaurant su	0.00
07/01/2015	3:19 PM	2021500004	01	H			Aluminum doors	EACH	3.00	A-one aluminium d	0.00
06/23/2015	2:01 PM	5550000002	18	H			Lawn Fertilizer	EACH	12.00	A flower connecti	0.00
06/23/2015	2:00 PM	5550000001	18	H			Weed wacker	EACH	21.00	Amx distribution	0.00

Buttons: Add, Edit, Delete, Notes, Attach

You can type in the Purchase order number, Search by PO, or Search by Vendor.



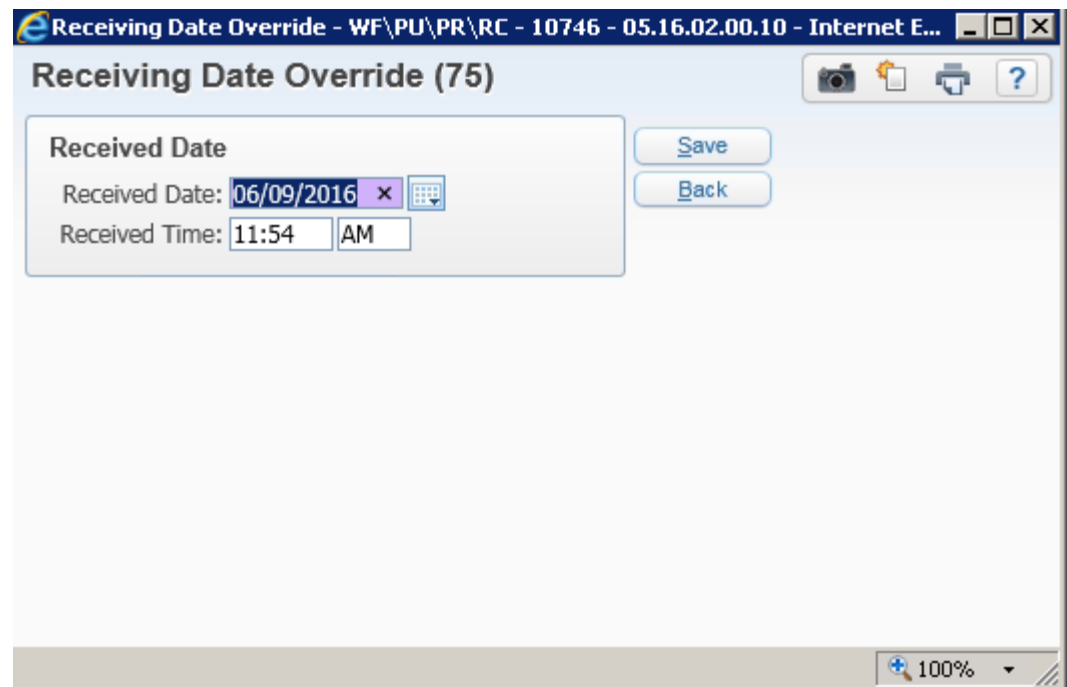
PO Line Items (85)

Enter PO Number:

Views: Filters:

There are no records to display; check your filter settings.

After clicking Save, the Receiving Date Override window will display. Date and Time defaults to current .



Setup your report template.

Reports - WF\PU\PR\RE - 31052 - 05.16.02.00.10 - Internet Explorer

Skyward School District Oliver Briery

Home Account Management Vendors **Purchasing** Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Reports (116)

Reports - RP
PO Items Received - PI

PO Items Received Range Screen - WF\PU\PR\RE\PI - 25132 - 05.16.02.00.10 - Internet Explorer

PO Items Received Range Screen (80)

Template Settings

* Template Description: **Receiving report** x

Share with other users in the district
 Print Greenbar

Save
Save and Print
Back

P.O. Items Received Parameters

Report Type
 All Items Received Items NOT Received

Sort
 Sort 1: Vendor
 Sort 2: Date Received
 Sort 3: Purchase Order
 Sort 4: Due Date

Ranges

	Low	High
Date Received:	01/01/1900	12/31/2999
Due Date:	01/01/1900	12/31/2999
PO Number:	0	9999999999

Vendors
 All Vendors Vendor Key Range Selected Vendors

Low High
ZZZZZZZZZZ

Select Vendors

No Individual Vendors selected

Invoiced Items
 All Invoiced Not Invoiced
 Print Check Number and Date Paid

Page Break by Purchase Order
 Print Notes.
 Print Receiving Comments.

Asterisk (*) denotes a required field

100%

Report shows items received but not invoiced.

3porec02.p 02-2 SCRAMBLED DATABASE 06/09/16 Page:1
 05.16.02.00.00 All P.O. Items - Vendor-Date Received-Purchase Order-Due Date 12:01 PM

VENDOR	DATE RCVD	TIME	PO #	DUK DATE	ITEM RECEIVED	QUANTITY/AMOUNT	RECEIVED BY	INVOICE #
	02/05/2009	10:38am	1030900033	01/21/2009	SCRAMBLE PO DETAIL DATA 110	1	Fondaocr, Hattie L	
	02/18/2009	8:58am	2400900078	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
		9:01am	2400900080	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
	02/27/2009	1:14pm	2400900078	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
		1:17pm	2400900080	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
	03/26/2009	11:25am	2400900080	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
		11:27am	2400900078	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
	04/27/2009	2:25pm	2400900078	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
		2:26pm	2400900080	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
	06/08/2009	8:11am	9310900125	06/01/2009	SCRAMBLE PO DETAIL DATA 110	1	Quantacr, Teri X	
		8:32am			SCRAMBLE PO DETAIL DATA 110	1	Quantacr, Teri X	
	06/10/2009	8:46am	9310900137	06/09/2009	SCRAMBLE PO DETAIL DATA 100	1	Quantacr, Teri X	
	06/15/2009	12:33pm	9310900140	06/10/2009	SCRAMBLE PO DETAIL DATA 110	1	Quantacr, Teri X	
		9:50am	2400900078	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
		9:51am	2400900080	02/06/2009	SCRAMBLE PO DETAIL DATA 100	1	Puellacr, Sandra H	
	07/23/2009	8:17am	0410900139	07/20/2009	SCRAMBLE PO DETAIL DATA 110	1	Plotneracr, Danielle W	
	07/28/2009	12:19pm	1060900099	07/22/2009	SCRAMBLE PO DETAIL DATA 100	30	Orloffacr, Leah V	
					SCRAMBLE PO DETAIL DATA 110	30		
					SCRAMBLE PO DETAIL DATA 120	30		
					SCRAMBLE PO DETAIL DATA 130	30		
					SCRAMBLE PO DETAIL DATA 140	30		
					SCRAMBLE PO DETAIL DATA 150	350		
					SCRAMBLE PO DETAIL DATA 160	50		
					SCRAMBLE PO DETAIL DATA 170	50		
					SCRAMBLE PO DETAIL DATA 180	50		
					SCRAMBLE PO DETAIL DATA 190	50		
					SCRAMBLE PO DETAIL DATA 200	50		
					SCRAMBLE PO DETAIL DATA 210	250		
					SCRAMBLE PO DETAIL DATA 220	30		
		12:20pm	1060900098	07/22/2009	SCRAMBLE PO DETAIL DATA 100	100	Orloffacr, Leah V	
					SCRAMBLE PO DETAIL DATA 110	300		
	09/08/2009	2:20pm	9011000028	09/02/2009	SCRAMBLE PO DETAIL DATA 110	1	Tonysacr, Eleanor A	
	09/18/2009	2:52pm	2401000011	09/15/2009	SCRAMBLE PO DETAIL DATA 110	1	Puellacr, Sandra H	
					SCRAMBLE PO DETAIL DATA 120	1		
		2:54pm	2401000013	09/15/2009	SCRAMBLE PO DETAIL DATA 110	1	Puellacr, Sandra H	
					SCRAMBLE PO DETAIL DATA 120	1		
		9:00am	9311000007	09/17/2009	SCRAMBLE PO DETAIL DATA 110	1	Jaquasacr, Blanca P	
	10/09/2009	8:05am	0511000093	10/08/2009	SCRAMBLE PO DETAIL DATA 100	406	Garbarinoacr, Michele M	
					SCRAMBLE PO DETAIL DATA 110	2		



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THANK YOU FOR ATTENDING!

