

ESM Purchase[™] Receive Reference Guide

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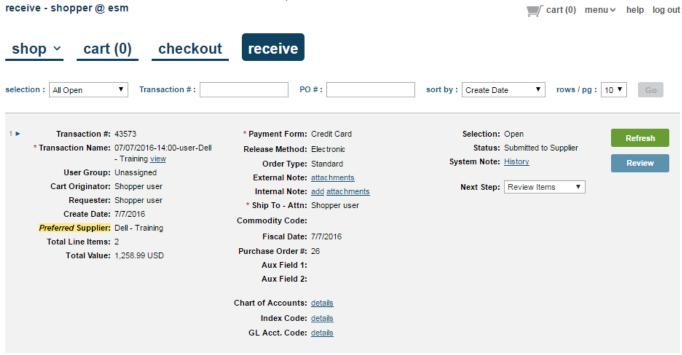
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ESM PurchaseTM Receive Process

This document provides a condensed overview of the ESM Purchase™ Receive Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Review Items

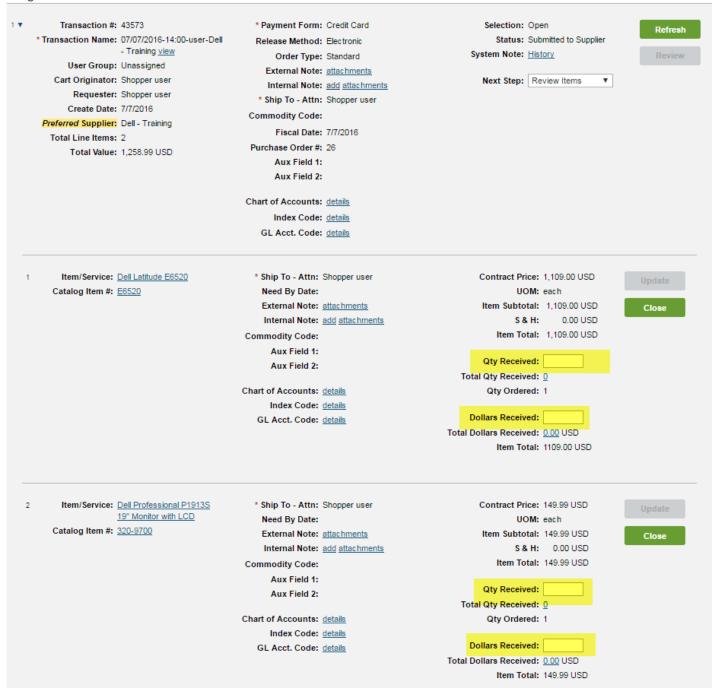
The Receiver can select the Review button to see open items.



Note: The caret in the top left corner also expands the order.

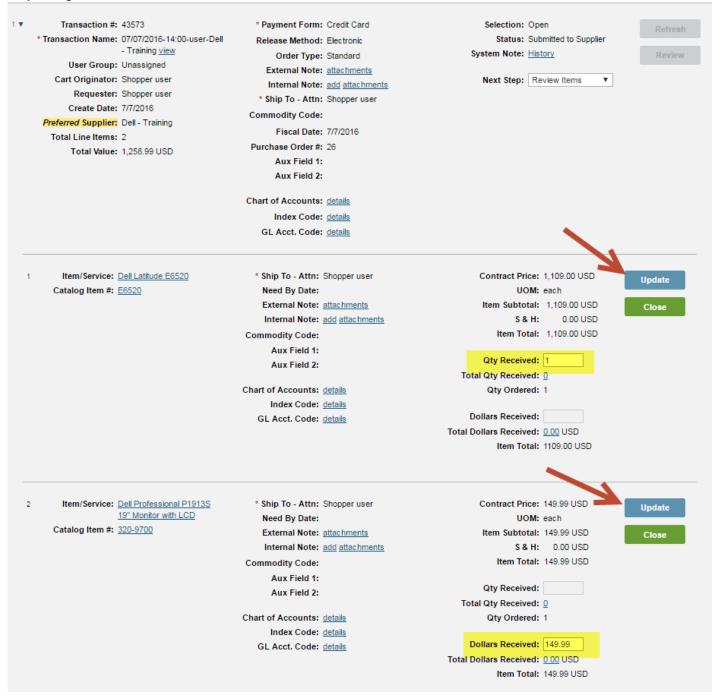
Receiving Items

Items can be received via Qty Received or Dollars Received. The receiving options are based on your entity/user configuration.



Note: The Receiver can either see all orders within the entity or only their orders based on user configuration.

The Receiver will enter the Quantity/Dollar Amount and select Update. Items may allow for over-receipts based on the entity configuration.



Closing Items

Items can be closed by selecting Close Order in the drop down menu and selecting the Close button. The System allows the Receiver to close without the full receipt.

Transaction #: 43573 * Payment Form: Credit Card Selection: Open Refresh * Transaction Name: 07/07/2016-14:00-user-Dell Status: Received Release Method: Electronic - Training view System Note: History Close Order Type: Standard User Group: Unassigned External Note: attachments Cart Originator: Shopper user Next Step: Close Order Internal Note: add attachments Requester: Shopper user * Ship To - Attn: Shopper user Create Date: 7/7/2016 Commodity Code: Preferred Supplier: Dell - Training Fiscal Date: 7/7/2016 Total Line Items: 2 Purchase Order #: 26 Total Value: 1,258.99 USD Aux Field 1: Aux Field 2: Chart of Accounts: details Index Code: details GL Acct. Code: details Item/Service: Dell Latitude E6520 * Ship To - Attn: Shopper user Contract Price: 1,109.00 USD Catalog Item #: E6520 Need By Date: UOM: each External Note: attachments Item Subtotal: 1,109.00 USD S & H: 0.00 USD Internal Note: add attachments Item Total: 1,109.00 USD Commodity Code: Aux Field 1: Qty Received: Aux Field 2: Total Qty Received: 1 Chart of Accounts: details Qty Ordered: 1 Index Code: details Dollars Received: GL Acct. Code: details Total Dollars Received: 0.00 USD Item Total: 1109.00 USD Item/Service: Dell Professional P1913S * Ship To - Attn: Shopper user Contract Price: 149.99 USD 19" Monitor with LCD Need By Date: UOM: each Catalog Item #: 320-9700 External Note: attachments Item Subtotal: 149.99 USD S & H: 0.00 USD Internal Note: add attachments Commodity Code: Item Total: 149.99 USD Aux Field 1: Qty Received: Aux Field 2: Total Qty Received: 0 Chart of Accounts: details Qty Ordered: 1 Index Code: details Dollars Received: GL Acct. Code: details Total Dollars Received: 149.99 USD Item Total: 149.99 USD

The Receiver will confirm if they want to close the order.



Re-Open Order

After the order is closed, it can be re-opened by selecting the option in the Drop Down Menu and selecting the Open button. The Receiver also has the option to View the Order in the Drop Down Menu.

