

ESM Purchase[™] Receive Reference Guide



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ESM Purchase™ 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.

receive - shopper@esm

cart (0) menu help log out

shop cart (0) checkout **receive**

selection: All Open Transaction #: PO #: sort by: Create Date rows / pg: 10 Go

Transaction #: 43573 * Transaction Name: 07/07/2016-14:00-user-Dell - Training view User Group: Unassigned Cart Originator: Shopper user Requester: Shopper user Create Date: 7/7/2016 Preferred Supplier: Dell - Training Total Line Items: 2 Total Value: 1,258.99 USD	* Payment Form: Credit Card Release Method: Electronic Order Type: Standard External Note: attachments Internal Note: add attachments * Ship To - Attn: Shopper user Commodity Code: Fiscal Date: 7/7/2016 Purchase Order #: 26 Aux Field 1: Aux Field 2: Chart of Accounts: details Index Code: details GL Acct. Code: details	Selection: Open Status: Submitted to Supplier System Note: History Next Step: Review Items	Refresh Review
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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.

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

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.

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

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.

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

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

Close- easyPurchase x

Closing the transaction will mark all line items as closed. Are you sure you wish to close receiving for this 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.

<p>Transaction #: 43573</p> <p>* Transaction Name: 07/07/2016-14:00-user-Dell - Training view</p> <p>User Group: Unassigned</p> <p>Cart Originator: Shopper user</p> <p>Requester: Shopper user</p> <p>Create Date: 7/7/2016</p> <p>Preferred Supplier: Dell - Training</p> <p>Total Line Items: 2</p> <p>Total Value: 1,258.99 USD</p>	<p>* Payment Form: Credit Card</p> <p>Release Method: Electronic</p> <p>Order Type: Standard</p> <p>External Note: attachments</p> <p>Internal Note: attachments</p> <p>* Ship To - Attn: Shopper user</p> <p>Commodity Code:</p> <p>Fiscal Date: 7/7/2016</p> <p>Purchase Order #: 26</p> <p>Aux Field 1:</p> <p>Aux Field 2:</p> <p>Chart of Accounts: details</p> <p>Index Code: details</p> <p>GL Acct. Code: details</p>	<p>Selection: Closed</p> <p>Status: Received and Closed</p> <p>System Note: History</p> <p>Next Step: <div style="border: 1px solid black; padding: 2px;">Re-Open Order ▼ Review Items Close Order Re-Open Order View Order</div></p>	<input type="button" value="Refresh"/> <input type="button" value="Open"/>
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