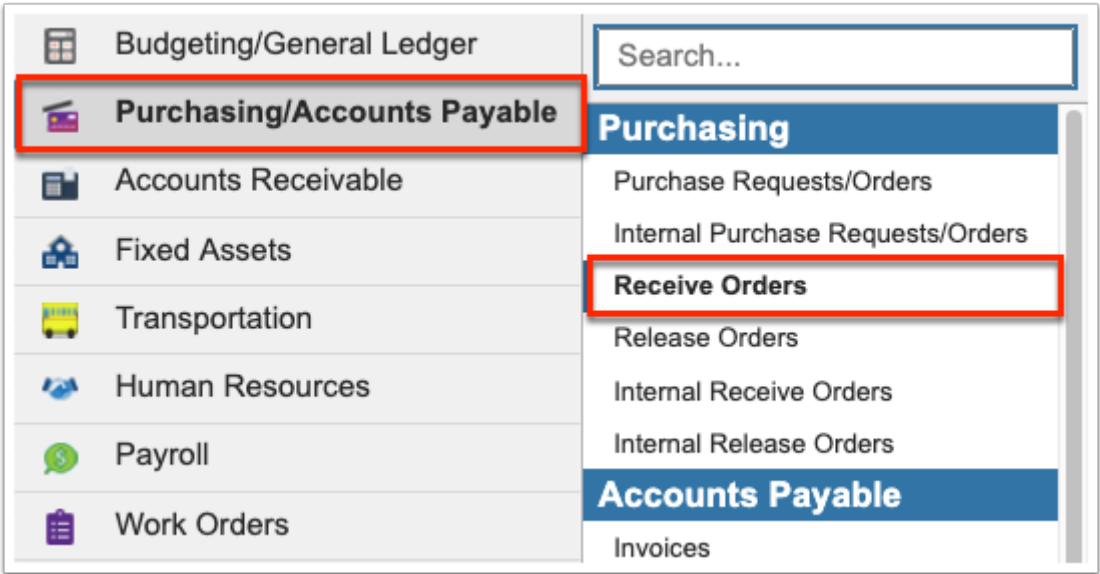# Receive Orders

The Receive Orders screen allows users to view information from the original purchase order and mark items as received. Once received, users can also release items for payment, as well as partial release for a portion of item received. Users can enter the number of items returned, if applicable. Fixed assets information including items received and/or returned, serial number, and location of the asset can also be completed.

> ℹ️ In order to generate notifications when orders are received, the **Generate Notification** permission must be enabled via Setup > [Profiles](#) > Purchasing/Accounts Payable tab.

Receive Orders

> ℹ️ See Setup > [Settings](#) > [Accounts Payable](#) for information on settings as they pertain to receiving and releasing purchase order items.

1. From the **Purchasing/Accounts Payable** menu, click **Receive Orders**.

2. Select the purchase order for which items are being received from the **Purchase Orders** pull-down.

Selecting the PO from the pull-down pulls the Request Information from the original PO completed via Purchasing/Accounts Payable > Purchase Requests/Orders.

Here you can review the Name, PO #, Author, Vendor, Bids, Vendor Contact, Deadline Date, Request Type, Request Date, Order Contact, School Contact, Deliver To, etc.

Click the **PO #** to open the original purchase order in Purchase Requests/Orders.

3. The **Close PO** check box is selected by default. Clear the check box to keep the purchase order open even after you've received the applicable items. The Close PO check box is typically cleared to keep the PO open for blanket POs or when you are still awaited items to be received.

ⓘ The Close PO check box displays when the setting "Auto-Close Non-Blanket PO's Upon Invoice Posting" is enabled via Setup > Settings > Accounts Payable.

The Line Items section displays the line items from the original PO and includes the Item #, Description, Price, Qty Ordered, QTY Remaining, Current Receiving, Current Returning, the number Received, the number Returned, Qty Released for payment, the Received Date, and the Receivers.

		Item #	Description	Price	Qty Ordered	Qty Remaining	Current Receiving	Current Returning	Received	Returned	Qty Released	Received Date	Receivers
View/Receive Assets	✔		wall rack 48"	1115.38	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
Receive	Partial Release ☐		full range speaker R%96MAX	1657.14	3.00	1			2.00	0.00	2.00	07/08/2019 11:57 am	Jocelyn
	✔		full range speaker R252Z	2471.43	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
	✔		full range speaker R5HP	1207.14	2.00	0			2.00	0.00	2.00	07/08/2019 11:57 am	Jocelyn
View/Receive Assets	✔		Network Amp 4000W	2428.57	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
View/Receive Assets			Network Amp 2000W	1928.57	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
View/Receive Assets	✔		Core w 24 channels	2571.43	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
	✔		MHS ODP - BCI - Data, Fire system and PA system	27726.83	1.00	0			1.00	0.00	1.00	07/08/2019 11:57 am	Jocelyn
View/Receive Assets			Handheld microphone	1528.57	1.00	1			0.00	0.00	0.00	08/23/2019 2:39 pm	Jocelyn

ℹ️ If receiving items from a stock warehouse purchase order, and if the **Add Asile and Bin data to receiving** setting is enabled via Setup > Settings > Accounts Payable, the Aisle and Bin information displays for applicable items.

4. Click **Receive** to receive all items or a specified number of items received.

a. Clicking Receive activates the **Current Receiving** and **Current Returning** fields. Enter the number of items received of the number ordered. If some of the items received are being returned due to damages or other reasons, enter the number of items being returned. In the example displayed, 3 items of 3 ordered were received. 1 of those 3 are being returned.

Current Receiving	Current Returning	Received	Returned
		1.00	0.00
3	1	3	1
		1.00	0.00
		2.00	0.00

b. Instead of clicking Receive, you can enter the **Current Receiving** and/or **Current Returning** items in the fields which automatically marks the item as received once you click Save.

	Receive and Release All	Save

emaining	Current Receiving	Current Returning	Received	Returned	Qty
3	2		2		
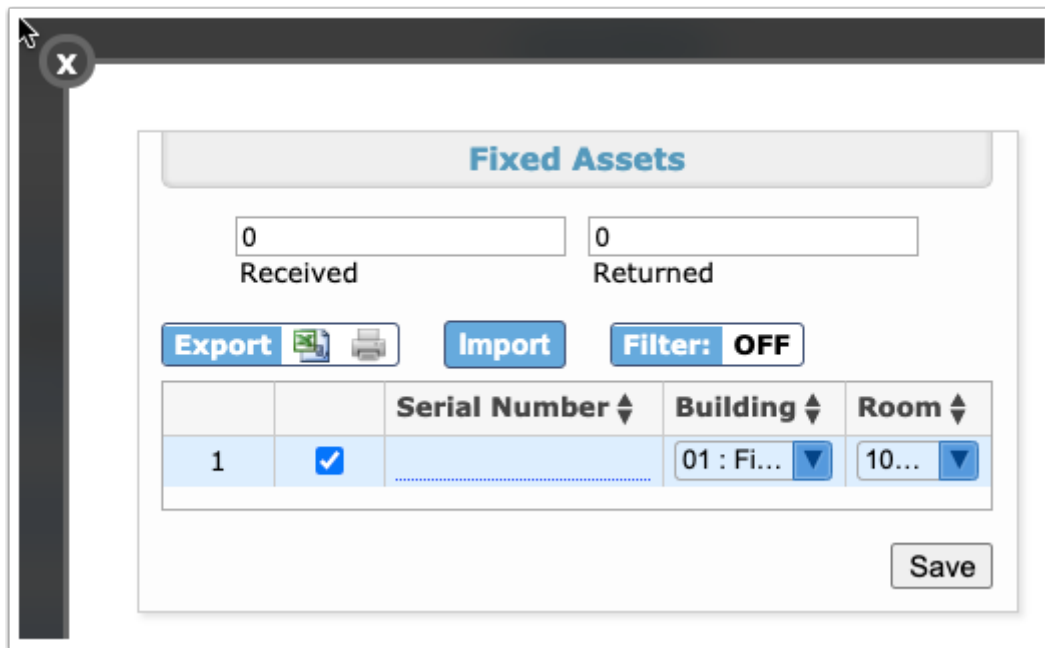
Numbers Only

5. Click **View/Receive Assets** to view and receive items from a PO that contains a fixed asset.

	Receive	Partial Release ☐		full range speaker R%96MAX
	✔			full range speaker R252Z
	✔			full range speaker R5HP
View/Receive Assets	✔			Network Amp 4000W
View/Receive Assets	✔			Network Amp 2000W
View/Receive Assets	✔			Core w 24 channels
	✔			MHS ODP - BCI - Data, Fire system and PA system
View/Receive Assets				Handheld microphone

ℹ️ Fixed Assets information is required upon receiving the item depending on the Receive check box being seleced via Fixed Assets > Categories > Current Category.

a. In the Fixed Assets pop-up window enter the number of items **Received** and/or **Returned** (if applicable).
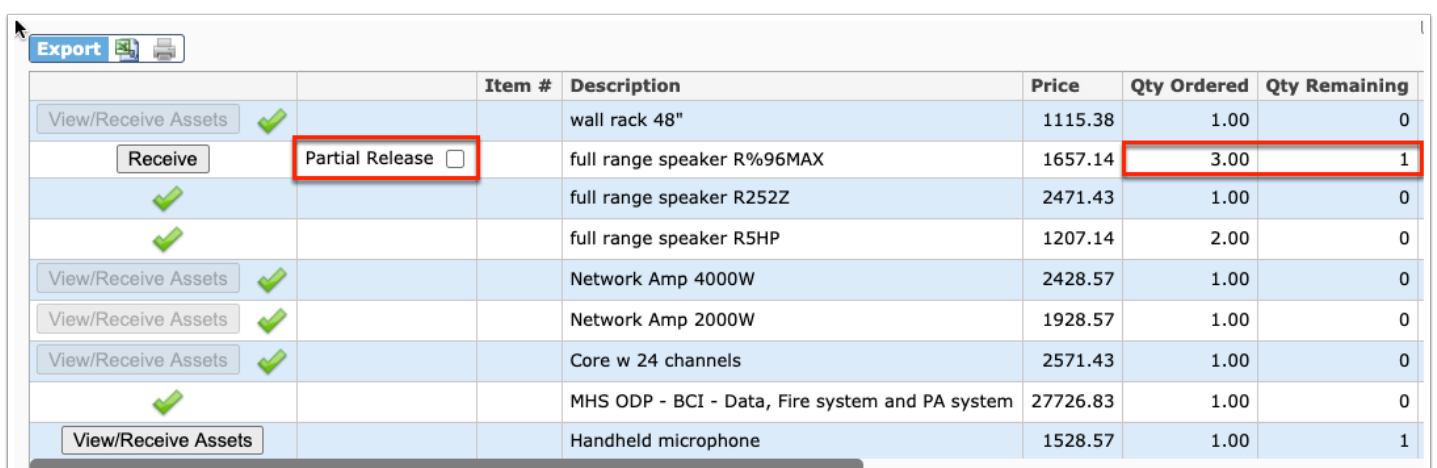
b. Enter the **Serial Number** of the asset in the text box.

c. Select the **Building** and **Room** from each corresponding pull-down to indicate where the fixed asset will be housed for inventory purposes.

d. Click **Save** and click the **X** to close the pop-up window.

6. Select the **Partial Release** check box if some of the items have been received but you are still waiting for items to be received as indicated in the Qty Remaining column. Selecting Partial Release allows payment to be sent for the items received even though you are still waiting for the rest of the items. In the example displayed, 3 speakers have been ordered but only 2 have been received; therefore, 1 speaker is remaining. This is also applicable if items have been returned.

		Item #	Description	Price	Qty Ordered	Qty Remaining
View/Receive Assets ✓			wall rack 48"	1115.38	1.00	0
Receive	Partial Release ☐		full range speaker R%96MAX	1657.14	3.00	1
✓			full range speaker R252Z	2471.43	1.00	0
✓			full range speaker R5HP	1207.14	2.00	0
View/Receive Assets ✓			Network Amp 4000W	2428.57	1.00	0
View/Receive Assets ✓			Network Amp 2000W	1928.57	1.00	0
View/Receive Assets ✓			Core w 24 channels	2571.43	1.00	0
✓			MHS ODP - BCI - Data, Fire system and PA system	27726.83	1.00	0
View/Receive Assets			Handheld microphone	1528.57	1.00	1

7. If the item has been received in entirety, select the **Release** check box in order to send payment for all items in the PO.

8. Click **Save**.

9. If all items in the PO have been received and are ready to be released for payment, click **Receive and Release All**.

⚠ If you click **Receive and Release All**, all items are automatically received and released. You cannot edit the Current Receiving or Current Returning fields.

> ℹ️ The Receive and Release All feature is only available if you have the **Allow Receive All** permission enabled via Human Resources > [Profiles](#) > Purchasing/Accounts Payable tab.

Files uploaded in the original PO are displayed.
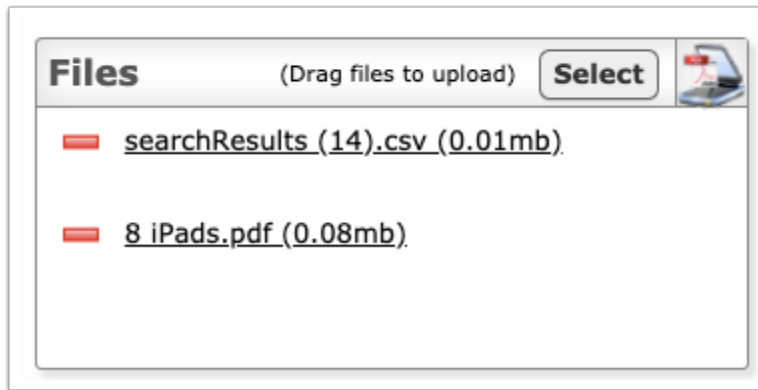
10. Click the attached file link to open and view or download the file.

11. Click the delete button (red minus sign) to remove an attached file.

12. To attach additional files, as indicated in the Files section, drag files directly into the box or click the **Select** button to browse for files. There is also a Scan File button next to the Select button for direct scanning. Click the **Scan File** button; this will prompt you to download Dynamsoft. This is a one-time download that allows you to attach files directly from your scanner. In doing so, you will bypass saving the file to your computer first.
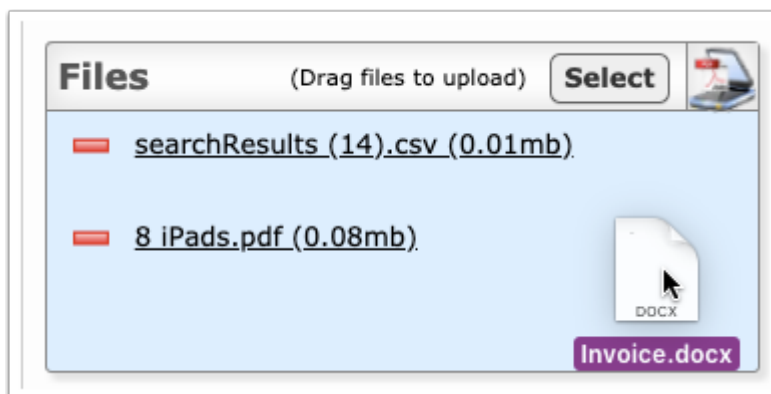
13. Review comments made in the original PO. To add a comment, type the comment in the provided text box. Then, click **Post**.

Receiving History

1. From the **Purchasing/Accounts Payable** menu, click **Receive Orders**.

2. Click the **Receiving History** tab.

3. Select the applicable fiscal year from the pull-down. The pull-down defaults to the current fiscal year.

The Receiving History report displays the PO#, PO name, and Vendor.

4. Click **View** to review details about the purchase order and receiving transactions.

To view details regrading a different purchase order, select the PO from the **Purchase Order**s pull-down.

Click the **PO #** to open the original purchase order in [Purchase Requests/Orders](#).

Review attached **Files**. Click the attached files to download them to you computer and save or open them.

Review **Comments** added. To post your own comment, type the comment in the provided text box and click **Post**.

Additional Features

To quickly open a purchase order by the purchase order number, type the number in the **Look up PO #** text box and press the **Enter** key.

Use the Filter text box located in select pull-downs to quickly find a selection. Begin typing the name or number of the data in question in the **Filter** text box to pull it to the beginning of the list.

Click the **Excel** icon in the Export section to export the table of data to an Excel spreadsheet, which can then be saved to your computer.

Click the **Printer** icon to print the table of data.