

# CYBAGE

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## Instructor Lead Training

**Brief:** This ILT session was created to provide an overview of various tasks of the client's retail and inventory systems.

### Tools & Technologies:

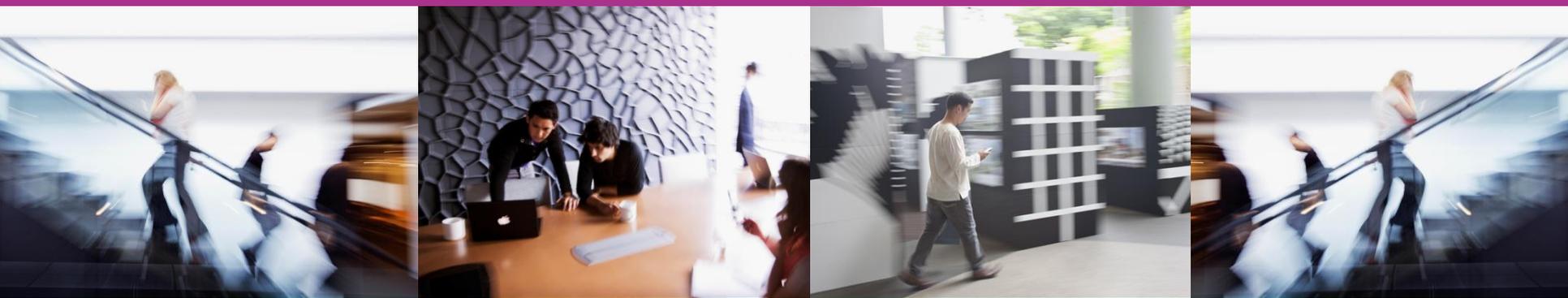


Acrobat PDF



Microsoft PPT

# Receive Purchase Order for Serialized and Non-Serialized Items



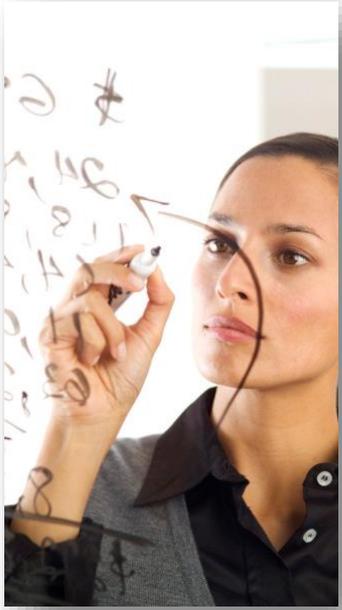
Date: Nov 2012

# Objectives

By the end of this lesson, you will be able to list the steps to receive a serialized and non-serialized purchase order.



- **Receiving a purchase order**



# Receiving a Purchase Order

A purchase order (P/O) is created to receive physical inventory in the store. A P/O is created and approved by a Retail Specialist and received by an administrator.

A P/O can include both Serialized and Non-Serialized inventory items.

Serialized items are either scanned or manually entered while receiving the P/O. Non-Serialized items are entered based on the total quantity while receiving the P/O.

# Receiving a Purchase Order



You receive a P/O when the status is updated to approved.

To receive a P/O:

1. Log on to the MicroTelecom application.
2. From the **Inventory** tab, click **Search P/O**.  
The **Purchase Order Search** window opens.
3. In the **File** list select the search parameter and enter the search terms.

 If you do not have specific search parameters, click **Search P/O**.

# Receiving a Purchase Order (Cont.)



The **Purchase Order Search** window displays a list of purchase orders matching the search criteria.

**Purchase Order Search (6 Records Found)**

File

System Ref #

From Date:  12/10/26 12:00 AM  To:  12/10/26 11:59 PM

Vendor: All

Location: LIMKETKAI

Sales Rep: All

Status: All

Search P/O

Limit Results To: 100

Order No	Order Date	Status	PO #	Vendor	Invoice	Order Amt	Rcvd Amt	Rep	Vendor ID	Store ID	Invoice Date
1011	10/26/2012	Approved	1011	AIKONTECH SVC CENTER		P0.00	P0.00	Admin	11172	12422	10/26/2012
1010	10/26/2012	Approved	1010	AIKONTECH SVC CENTER		P0.00	P0.00	Admin	11172	12422	10/26/2012
1009	10/26/2012	Order	1009	AIKONTECH SVC CENTER		P0.00	P0.00	Admin	11172	12422	10/26/2012
1008	10/26/2012	Order	1008	ALABANG TOWN CENTER	1008TMP	P2,737.50	P2,737.50	Admin	12110	12422	10/26/2012
1007	10/26/2012	Order	1007	ALABANG TOWN CENTER		P0.00	P0.00	Admin	12110	12422	10/26/2012
1006	10/26/2012	Order	1006	AIKONTECH SVC CENTER	1006TMP	P0.00	P0.00	Admin	11172	12422	10/26/2012

P2,737.50 P2,737.50

# Receiving a Purchase Order (Cont.)



**Purchase Order Search (6 Records Found)**

File

System Ref #

From Date:  12/10/26 12:00 AM  To:  12/10/26 11:59 PM

Vendor: All

Location: LIMKETKAI

Sales Rep: All

Status: All

Search P/O

Limit Results To: 100

Order No	Order Date	Status	PO #	Vendor	Invoice	Order Amt	Rcvd Amt	Rep	Vendor ID	Store ID	Invoice Date
1011	10/26/2012	Approved	1011	AIKONTECH SVC CENTER		P0.00	P0.00	Admin	11172	12422	10/26/2012
1010	10/26/2012	Approved	1010	AIKONTECH SVC CENTER				Admin	11172	12422	10/26/2012
1009	10/26/2012	Order	1009	AIKONTECH SVC CENTER				Admin	11172	12422	10/26/2012
1008	10/26/2012	Order	1008	ALABANG TOWN				Admin	12110	12422	10/26/2012
1007	10/26/2012	Order				P0.00	P0.00	Admin	12110	12422	10/26/2012
1006	10/26/2012	Order				P0.00	P0.00	Admin	11172	12422	10/26/2012

4. Double-click a purchase order and select **Receive P/O**.

P2,737.50 P2,737.50

# Receiving a Purchase Order (Cont.)



**PO Receive Screen**

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:14 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: Signed By: Admin

G/L #: ITEMS: 21

TOTAL: P9,709.39

Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
Order#: 1011 (10/26/2012)					
1220	HANDSET SOLO	1		P1.99	
Nokia1600	NOKIA GSM1600	10		P68.95	
303943	USB CABLE (922-9342)	10		P901.70	

5. Double-click the **QTY Rcv.** column to receive a serialized item in the P/O.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012 6:22 PM

Terms: CASH Items Received: 0

Note:

Sub Total: P0.00

Freight: P0.00

Tax: P0.00

Total: P0.00

Discount:

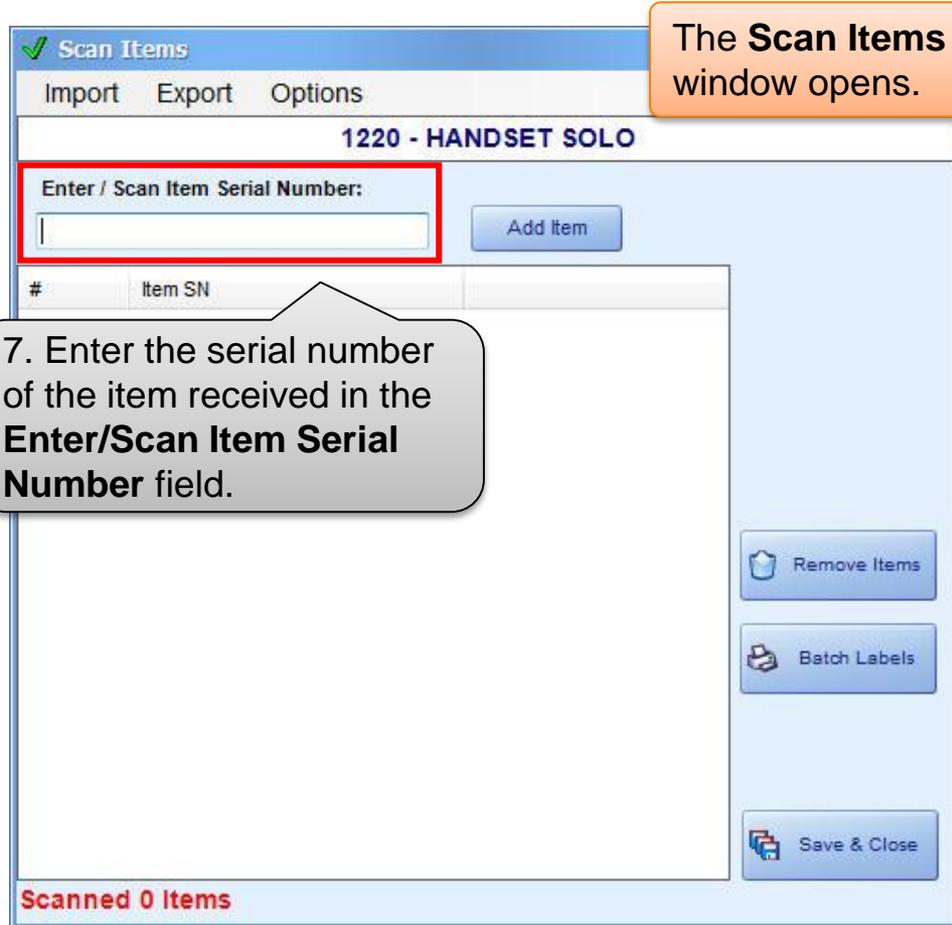
New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

The **PO Receive Screen** displays the purchase order to be received.

5. Double-click the **QTY Rcv.** column to receive a serialized item in the P/O.



# Receiving a Purchase Order (Cont.)

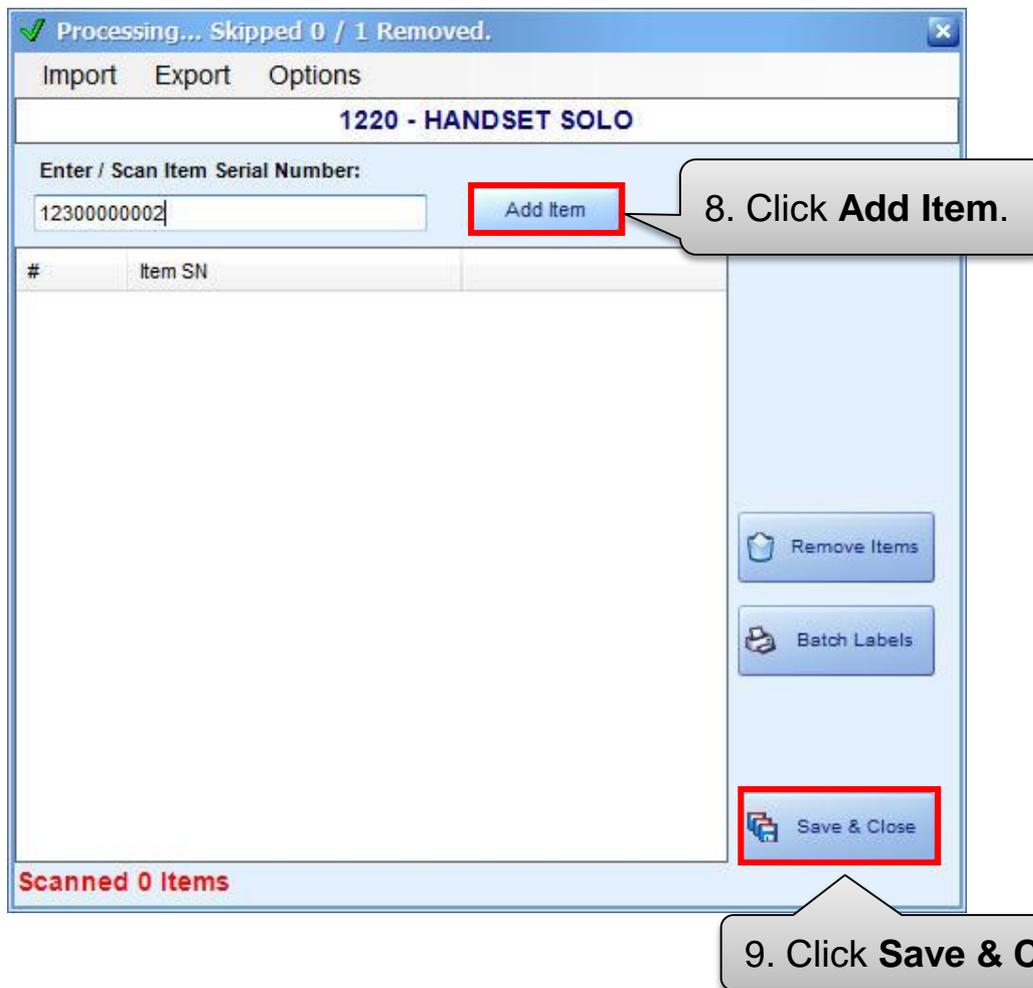


The **Scan Items** window opens.

7. Enter the serial number of the item received in the **Enter/Scan Item Serial Number** field.

Scanned 0 Items

# Receiving a Purchase Order (Cont.)



Processing... Skipped 0 / 1 Removed.

Import Export Options

1220 - HANDSET SOLO

Enter / Scan Item Serial Number:

12300000002

Add Item

8. Click Add Item.

#	Item SN

Remove Items

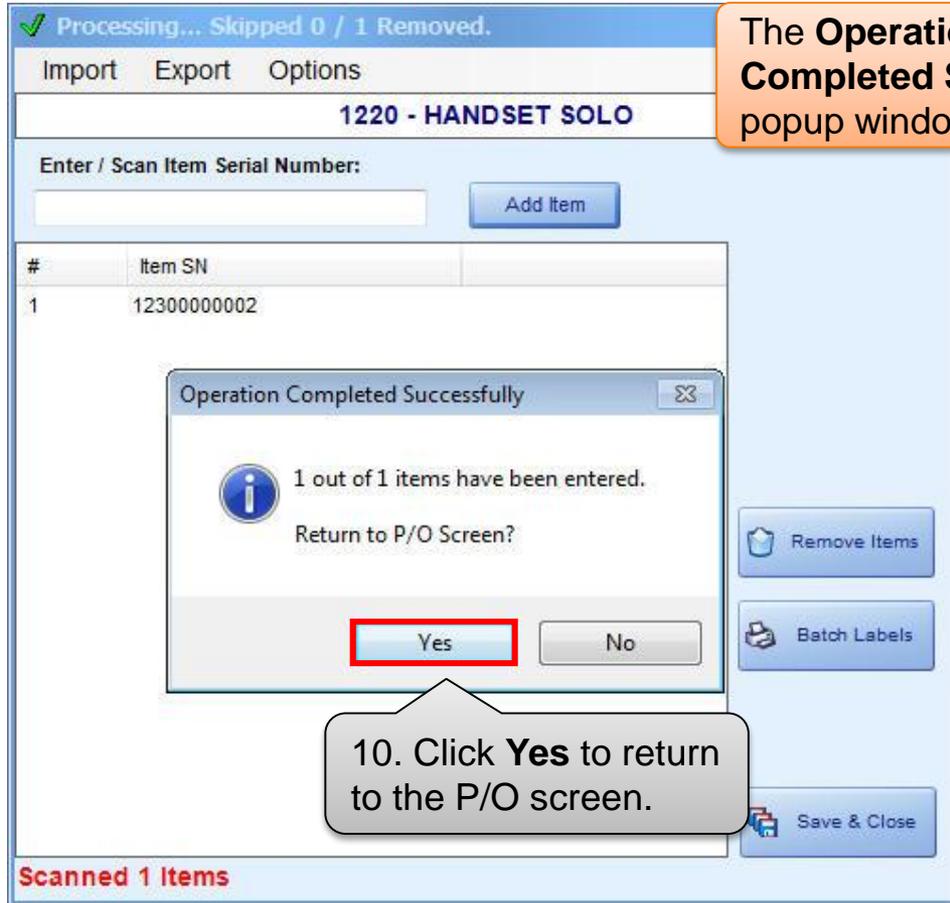
Batch Labels

Save & Close

9. Click Save & Close.

Scanned 0 Items

# Receiving a Purchase Order (Cont.)



Processing... Skipped 0 / 1 Removed.

Import Export Options

1220 - HANDSET SOLO

Enter / Scan Item Serial Number:

Add Item

#	Item SN
1	12300000002

Operation Completed Successfully

1 out of 1 items have been entered.  
Return to P/O Screen?

Yes No

Remove Items

Batch Labels

Save & Close

Scanned 1 Items

The **Operation Completed Successfully** popup window opens.

10. Click **Yes** to return to the P/O screen.

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: 1011TMP

G/L #: Signed By: Admin

Original PO Sum:  
ITEMS: 21  
TOTAL: P9,709.39  
Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
Order#: 1011 (10/26/2012)					
1220	HANDSET SOLO	1	1	P1.99	P1.99
Nokia1600	NOKIA GSM1600	10		P68.95	
303943	USB CABLE (922-9342)	10		P901.79	

The serialized inventory item is received as shown in the **QTY Rcv.** column.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012 6:22 PM

Terms: CASH Items Received: 1

Note:

Sub Total: P1.99  
Freight: P0.00  
Tax: P0.00  
Total: P1.99  
Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: 1011TMP

G/L #: Signed By: Admin

Original PO Sum:  
ITEMS: 21  
TOTAL: P9,709.39  
Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
Order#: 1011 (10/26/2012)					
1220	HANDSET SOLO	1	1	P1.99	P1.99
Nokia1600	NOKIA GSM1600	10		P68.95	
303943	USB CABLE (922-9342)	10		P901.79	

11. Double-click the **QTY Rcv.** column to receive bulk serialized item in the P/O.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012 6:22 PM

Terms: CASH Items Received: 1

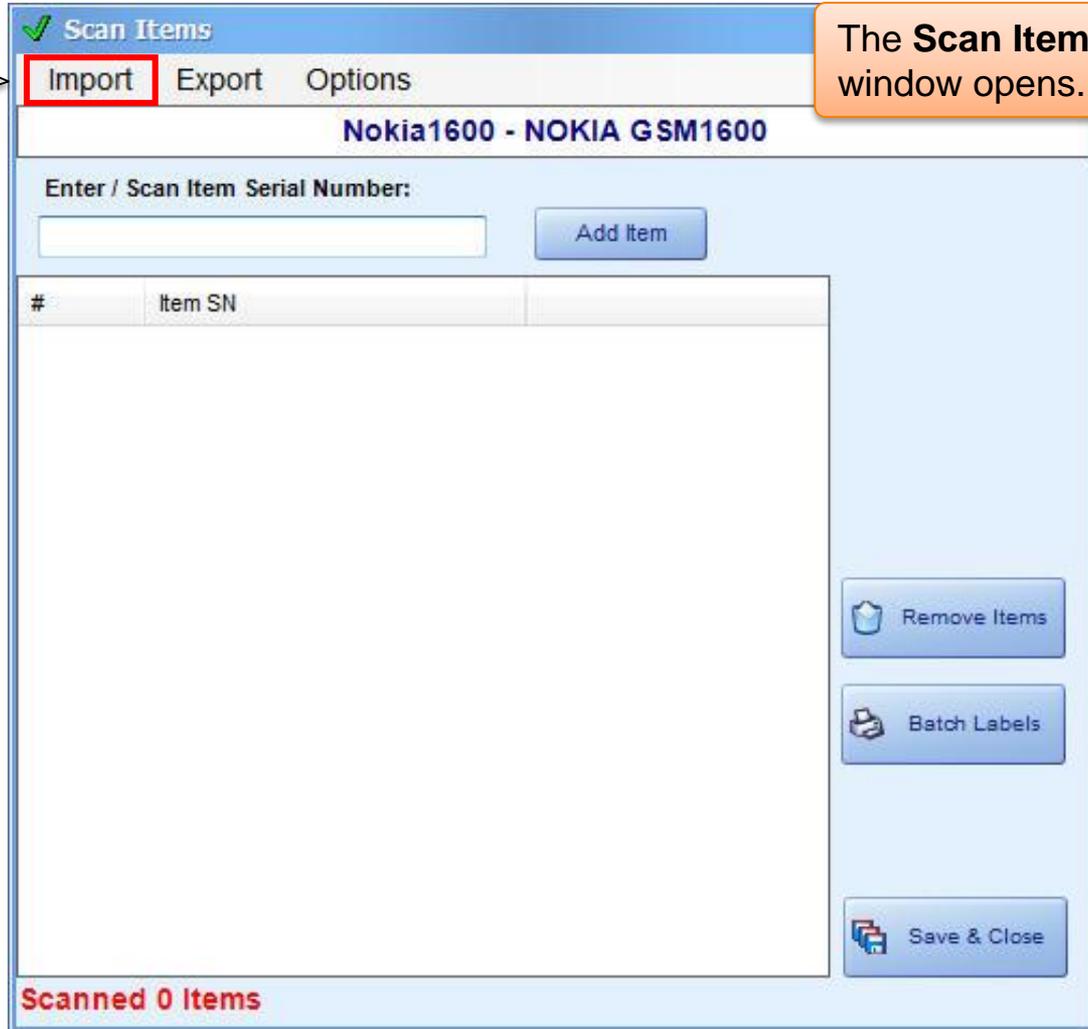
Note:

Sub Total: P1.99  
Freight: P0.00  
Tax: P0.00  
Total: P1.99  
Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)

12. Click **Import**.



✓ Scan Items

Import Export Options

Nokia1600 - NOKIA GSM1600

Enter / Scan Item Serial Number:

Add Item

#	Item SN	
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Remove Items

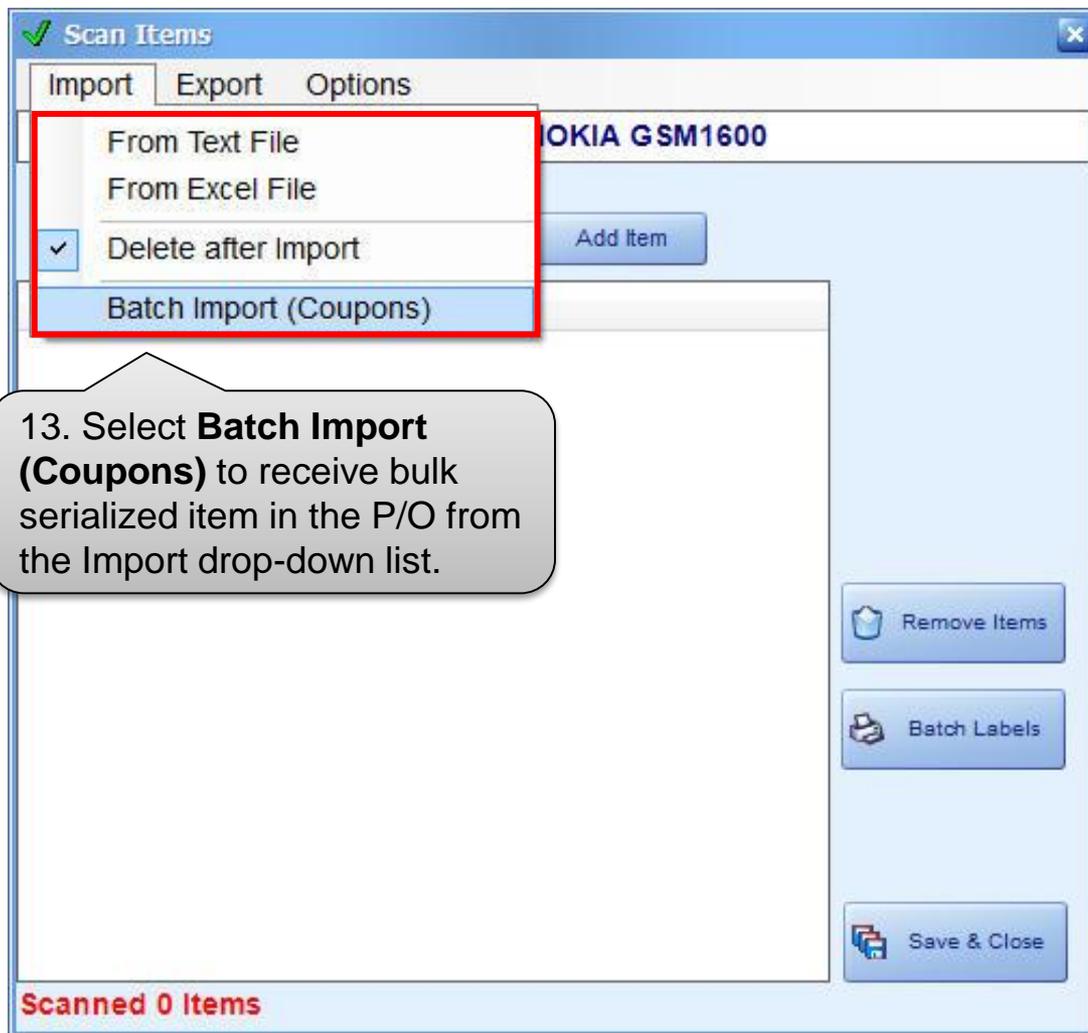
Batch Labels

Save & Close

Scanned 0 Items

The **Scan Items** window opens.

# Receiving a Purchase Order (Cont.)



✓ Scan Items

Import Export Options

From Text File

From Excel File

✓ Delete after Import

Batch Import (Coupons)

NOKIA GSM1600

Add Item

Remove Items

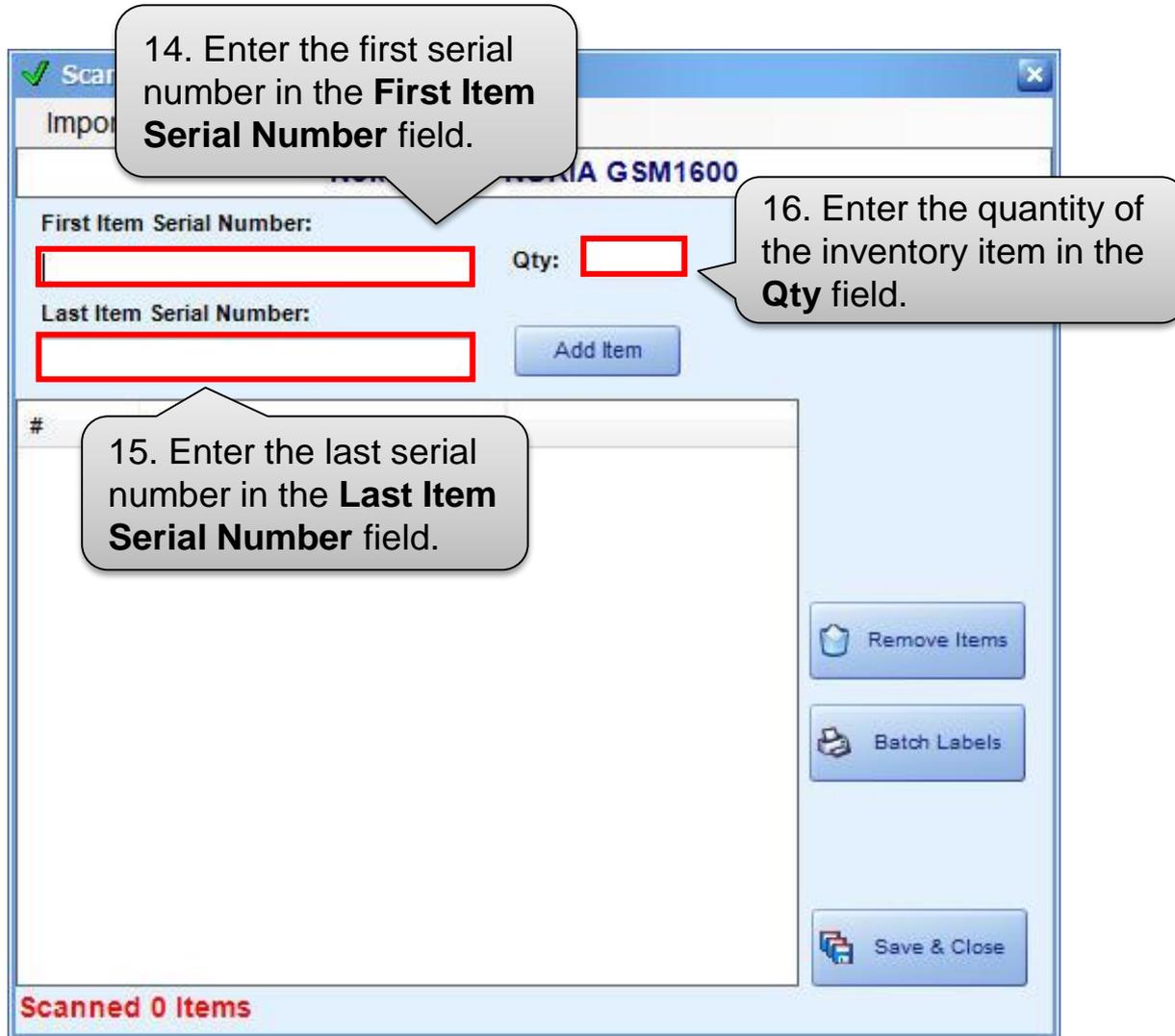
Batch Labels

Save & Close

Scanned 0 Items

13. Select **Batch Import (Coupons)** to receive bulk serialized item in the P/O from the Import drop-down list.

# Receiving a Purchase Order (Cont.)



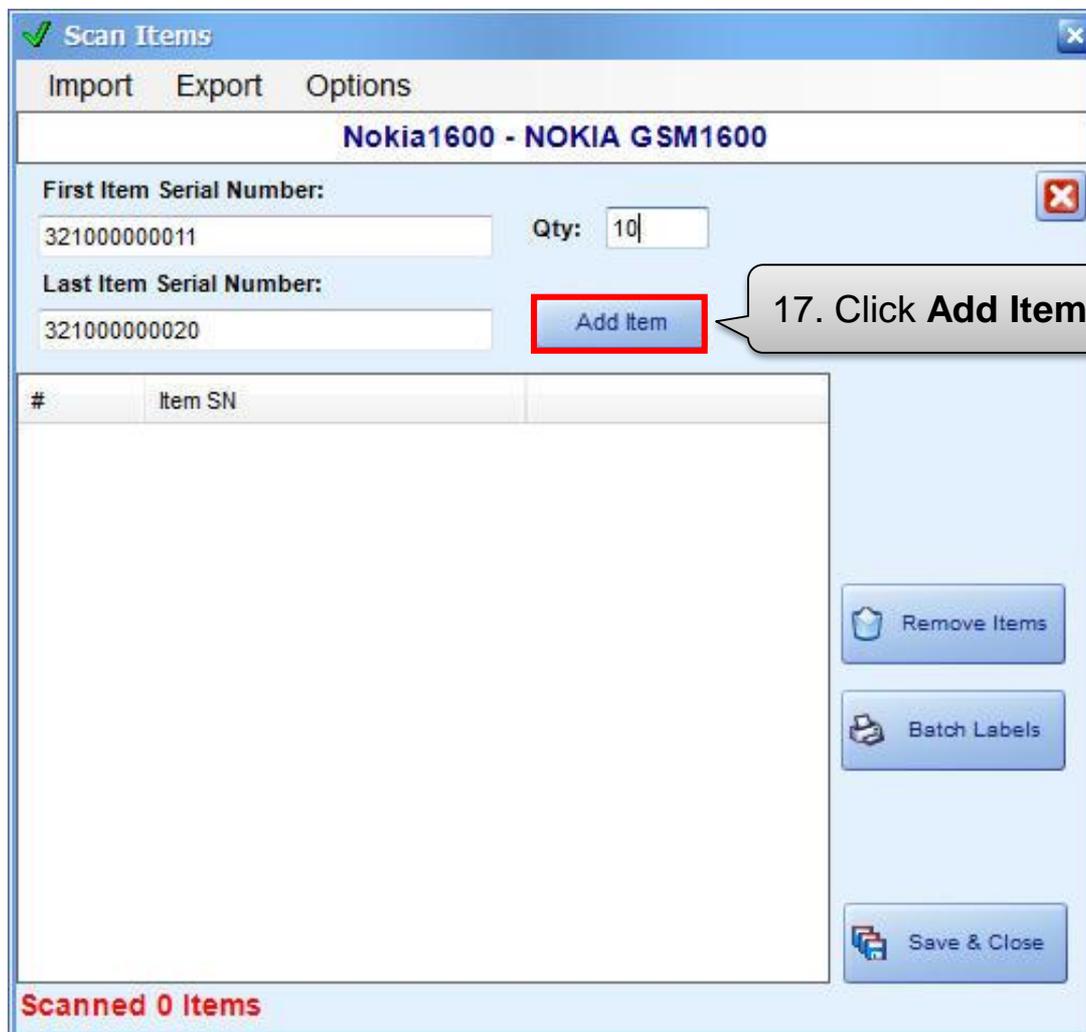
14. Enter the first serial number in the **First Item Serial Number** field.

15. Enter the last serial number in the **Last Item Serial Number** field.

16. Enter the quantity of the inventory item in the **Qty** field.

Scanned 0 Items

# Receiving a Purchase Order (Cont.)



✓ Scan Items

Import Export Options

Nokia1600 - NOKIA GSM1600

First Item Serial Number:  
321000000011 Qty: 10

Last Item Serial Number:  
321000000020

Add Item

17. Click Add Item.

#	Item SN
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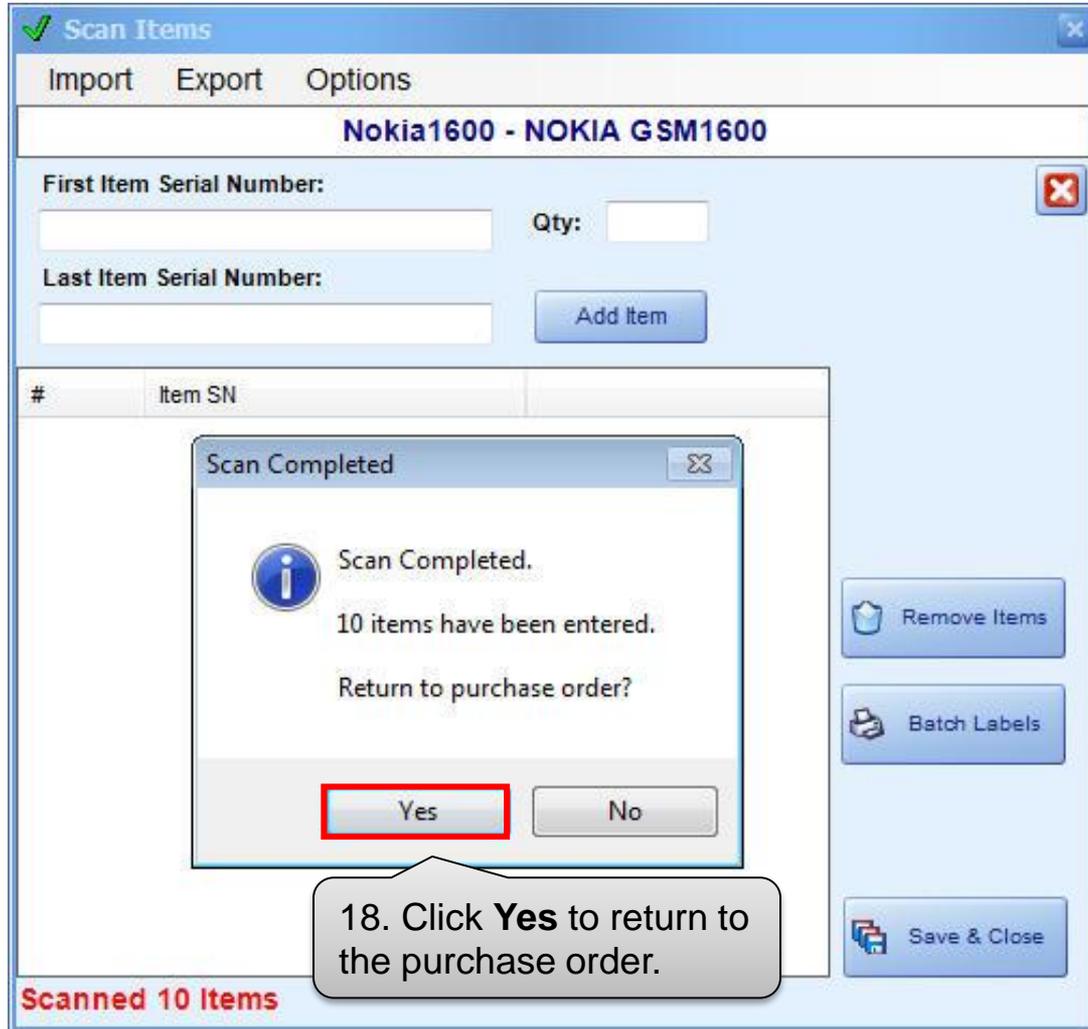
Remove Items

Batch Labels

Save & Close

Scanned 0 Items

# Receiving a Purchase Order (Cont.)



The screenshot shows the 'Scan Items' application window. At the top, there are tabs for 'Import', 'Export', and 'Options'. The main title is 'Nokia1600 - NOKIA GSM1600'. Below this, there are input fields for 'First Item Serial Number:' and 'Qty:', and another for 'Last Item Serial Number:'. An 'Add Item' button is located to the right of the 'Last Item Serial Number' field. A table with columns '#', 'Item SN', and an empty third column is visible. A 'Scan Completed' dialog box is overlaid on the table, containing an information icon, the text 'Scan Completed. 10 items have been entered. Return to purchase order?', and two buttons: 'Yes' (highlighted with a red box) and 'No'. To the right of the dialog, there are three buttons: 'Remove Items', 'Batch Labels', and 'Save & Close'. At the bottom left of the main window, a red status bar reads 'Scanned 10 Items'. A callout box at the bottom center contains the text: '18. Click **Yes** to return to the purchase order.'

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: 1011TMP

G/L #: Signed By: Admin

Original PO Sum:  
ITEMS: 21  
TOTAL: P9,709.39  
Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
Order#: 1011 (10/26/2012)					
1220	HANDSET SOLO	1	1	P1.99	P1.99
Nokia1600	NOKIA GSM1600	10	10	P68.95	P689.50
303943	USB CABLE (922-9342)	10		P901.79	

The bulk serialized inventory item is received as shown in the QTY Rcv. column.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012 6:22 PM

Terms: CASH Items Received: 11

Note:

Sub Total: P691.49  
Freight: P0.00  
Tax: P0.00  
Total: P691.49  
Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: 1011TMP

G/L #: Signed By: Admin

Original PO Sum:  
ITEMS: 21  
TOTAL: P9,709.39  
Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
<b>Order#: 1011 (10/26/2012)</b>					
1220	HANDSET SOLO	1	1	P1.99	P1.99
Nokia1600	NOKIA GSM1600	10	10	P68.95	P689.50
303943	USB CABLE (922-9342)	10		P901.79	

19. Double-click the **QTY Rcv.** column to receive bulk serialized item in the P/O.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012 6:22 PM Freight: P0.00

Terms: CASH Items Received: 11 Tax: P0.00

Note: Total: P691.49  
Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)

The **Enter Quantity Received** popup window opens.



20. Select the quantity of the non-serialized item from the **Enter Non-Serialized Quantity For** list.

21. Click **OK**.

**Note:** You can also scan the bar code of each non-serialized inventory item by clicking **Scan Each**. This functionality is optional.

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011 Vendor Inv #: 1011TMP

G/L #: Signed By: Admin

Original PO Sum:  
ITEMS: 21  
TOTAL: P9,709.39  
Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
Order#: 1011 (10/26/2012)					
1220	HANDSET SOLO	1	1	P1.99	P1.99
Nokia1600	NOKIA GSM1600	10	10	P68.95	P689.50
303943	USB CABLE (922-9342)	10	10	P901.79	P9,017.90

Add New Item Remove Selected Item

22. Click **Save** to receive the P/O.

Regula Receive Date: 10/26/2012 6:22 PM Freight: P0.00

Items Received: 21 Tax: P0.00

Total: P9,709.39

Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

The non-serialized inventory items are received as shown in the **QTY Rcv.** column.

# Receiving a Purchase Order (Cont.)



Receive P/O #1011

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:13 PM Invoice Date (AP): 10/26/2012 6:22 PM

Order #: 1011 Vendor: AIKONTECH SVC CENTER

P/O #: 1011

G/L #:

**The P/O Saved popup window opens.**

**Original PO Sum:**

ITEMS: 21

TOTAL: P9,709.39

Open Original P/O

Item ID	Item Description	QTY Ord	QTY Rcv	Cost	Total
<b>Order#: 1011 (10/26/2012)</b>					
1220	HANDSET SOLO		1	P1.99	P1.99
Nokia1600	NOKIA GSM1600		10	P68.95	P689.50
303943	USB CABLE (922		10	P901.79	P9,017.90

**P/O Saved.**

P/O #1011 Successfully Saved.

Ref Order #1011

**OK**

**23. Click OK.**

**24. Click Lock P/O Shipment to lock the purchase order.**

Add New Item Remove Selected Item

Delivery By: DB Schenker

Terms: CASH

Note:

Sub Total: P9,709.39

Freight: P0.00

Tax: P0.00

Total: P9,709.39

Discount:

New P/O Save **Lock P/O Shipment** Transfer Remaining Scan Non-Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)



**PO Receive Screen**

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:11 PM Invoice Date (AP): 10/26/2012 6:15 PM

Order #: 1010 Vendor: AIKONTECH SVC CENTER

P/O #: 1010

G/L #:

**The Lock and Transfer Items popup window opens.**

**Original PO Sum:**

ITEMS: 21

TOTAL: P9,710.04

Open Original P/O

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
1220				P2.64	P2.64
Nokia1600				P68.95	P689.50
303943				P901.79	P9,017.90

**Lock and Transfer Items**

You are about to lock this PO and transfer the backordered items to a new P/O

Are you sure you want to continue?

**Yes** No

**25. Click Yes to lock the P/O and transfer the backordered items.**

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Rec

Terms: CASH Item

Note:

Sub Total: P9,710.04

Freight: P0.00

Tax: P0.00

Total: P9,710.04

Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non - Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)



**PO Receive Screen**

File Print Tools

General Bill To Ship To Search

P/O Date: 10/26/2012 6:11 PM Invoice Date (AP): 10/26/2012 6:15 PM

Order #: 1010 Vendor: A/KONTROL CUS CENTER

P/O #: 1010

G/L #:

**Original PO Sum:**

ITEMS: 21

TOTAL: P9,710.04

Open Original P/O

An information box confirms that the received inventory transfer P/O was successfully locked.

Item ID	Item D	Y Rcv.	Cost	Total
Order#: 1010 (10/26/2012)				
1220		1	P2.64	P2.64
Nokia1600		0	P68.95	P689.50
303943		0	P901.79	P9,017.90

Received Inventory Transfer P/O #1010 was successfully locked.

OK

26. Click OK.

Add New Item Remove Selected Item

Delivery By: DB Schenker - Air - Regula Receive Date: 10/26/2012

Terms: CASH Items Received: 21

Note:

Sub Total: P9,710.04

Weight: P0.00

Tax: P0.00

Total: P9,710.04

Discount:

New P/O Save Lock P/O Shipment Transfer Remaining Scan Non - Serial Items Add Items by SKU Print

# Receiving a Purchase Order (Cont.)



The P/O is locked and a new P/O is created for the backordered items. The receive PO process is complete.

Item ID	Item Description	QTY Ord.	QTY Rcv.	Cost	Total
<b>Order#: 1010 (10/26/2012)</b>					
1220				P2.64	P2.64
Nokia1600				P68.95	P689.50
303943				P901.79	P9,017.90

PO has been locked and the remaining transferred to PO Ref #1012

OK

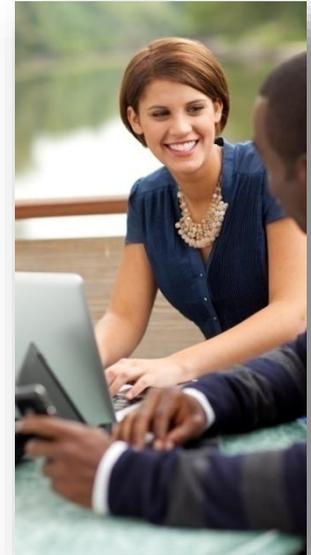
27. Click OK.  
**Note: Transfer Remaining** allows an administrator to convert the P/O to a read-only format and to transfer the backordered items to a new P/O.

# Try Your Luck



Which field do you need to click to receive serialized items in a PO Receive Screen?

- a. Scan Items
- b. QTY Rcv
- c. Select bin
- d. Lock P/O



# Time for Practice!

Open the **Receive a PO for Serialized and Non-Serialized Items** workbook and perform the following in the training environment:

- Exercise 1: Receiving a purchase order

**Note:** Some exercises might require you to use the data sheet provided by your instructor.



# Review

You should now be able to receive a purchase order by following the steps listed to receive serialized and non-serialized items.



# Thank You

