



## Receiving a Purchase Order

SOP 230

Revision F, 10/08/2019

Approved by: Don Stanton

### PURPOSE:

Purchase orders are created for materials purchased to be used in production or sold as is.

Upon receipt of material, a receiver is to verify against a purchase order to ensure accuracy. Purchase orders can be received in full or partially and can be separated by lot. Any discrepancies must be noted and resolved immediately. Received materials become active inventory once confirmed. Invoices will be created after purchase orders are received to ensure vendors are paid for materials.

### PROCESS STEPS – Inventory Items:

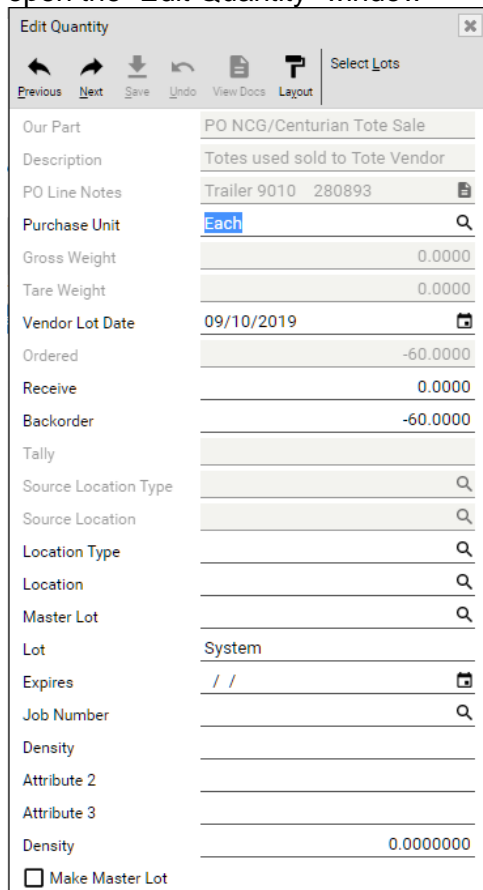
1. Navigate to Purchasing > Receive Purchase Orders.
2. Click on "Show Orders" in the header for a list of orders to be received.
3. Highlight the correct Purchase Order and click Continue.
4. Verify the quantities to be received and make any necessary changes by double clicking on the line item. This will open the Edit Quantity window.
  - a. Ensure the Purchase Unit is correct,
  - b. Enter Receive amount. If not receiving a full quantity, modify the amount in Receive and a backorder will automatically be created. Backorder can be zeroed out if needed.
  - c. Change Location Type,
  - d. Change Location,
  - e. If Lot = "Lot Required" enter Vendor Specific – Lot/Batch # (from Label/CoA from the vendor),
  - f. Enter Expires = Expiration Date when provided for Aviation Only
  - g. Click Save, and close the "Edit Quantity" window
5. If receiving multiple lots, select Split Lot on the banner above the header.
  - a. Enter in the Number of lots being received. (Totals must equal original PO)
6. If discrepancies exist, they must be entered in the notes field on the header.
7. Select Location Type and Location for the material to be placed.
8. Ensure Print PO labels After Receipt is checked.
9. Click Receive.
10. Click Print on the Print Part Forms window to complete

### PROCESS STEPS – Non-Inventory Items:

1. Navigate to Purchasing > Receive Purchase Orders.
2. Click on "Show Orders" in the header for a list of orders to be received.
3. Highlight the correct Purchase Order and click Continue.
4. Verify the quantities to be received and make any necessary changes by double clicking on the line item. This will open the Edit Quantity window.
  - a. Ensure the Purchase Unit is correct,
  - b. Enter Receive amount. If not receiving a full quantity, modify the amount in Receive and a backorder will automatically be created. Backorder can be zeroed out if needed.
  - c. Change Location Type,
  - d. Change Location,
  - e. If Lot = "Lot Required" enter Vendor Specific – Lot/Batch # on Label/CoA from the vendor,
  - f. Enter Expires = Expiration Date when provided for Aviation Only
  - g. Click Save, and close the "Edit Quantity" window
5. If discrepancies exist, they must be entered in the notes field on the header.
6. **EXIT RECEIVE PO window. Note:** Tulco AP will receive when Invoice has been received.

## RECEIVING CREDIT PO: (Return)

1. Navigate to **Purchasing > Receive Purchase Orders**
2. If you know the Purchase Order number, you can enter it in the pre-filter. You can also search using the other filters or click Show Orders.
3. Click Continue
4. From the Receive Purchase Orders tab, Double-click on the line (Part Number) you wish to receive to open the “Edit Quantity” window



- a. Enter the Receive quantity you want to return, and press tab. **Note:** THIS WILL BE A NEGATIVE RECEIVE QUANTITY to return
  - b. Click Select Lots [soft button] to open the Apply Inventory window
    - i. Double-click to select the appropriate Lot line that is being returned  
**Note:** If multiple Lots are listed to choose from, verify Lot number on Item(s) being returned
    - ii. Enter the Quantity of Item(s) being returned. **Note:** THIS WILL BE A POSSITIVE RETURN QUANTITY to return
    - iii. Click Save, and exit “Select Quantity” window
  - c. Click Apply  
**Note:** This will apply the correct Location Type, Location, & Lot that is being returned.
  - d. Click Save, and exit “Edit Quantity” window
5. Click Receive



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### REVISIONS

Rev	Date	Change
I/R	10/31/17	New
A	7/26/18	Move Print before Receive
B	9/26/18	Add steps for non-inventory items
C	12/12/18	Add steps for Lots
D	9/10/19	Add new steps for Lot and pictures
E	10/7/19	Clear up Receiving steps for Select Lots
F	10/8/19	Change steps for Select Lots steps