

Job Aid: How to Cancel Items in COMMBUYS

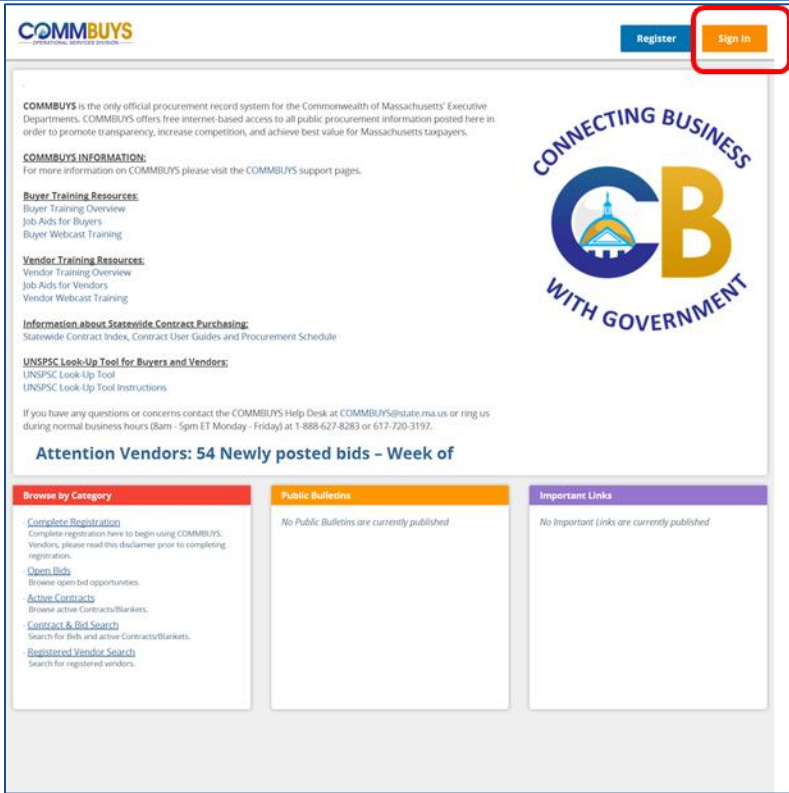
This Job Aid Shows How To:

- Cancel items in COMMBUYS

Of Special Note:

Before a receipt can be processed, there must be a purchase order (PO) in Sent status. The receiving of goods and services may be either a complete or a partial receipt. Items that are being returned must be received and then returned. The receipt of items can also be cancelled without first receiving them. This Job Aid shows how to cancel items on a PO and the completed receipt with a Receipt Number assigned in an updated status of Approved for Invoice.

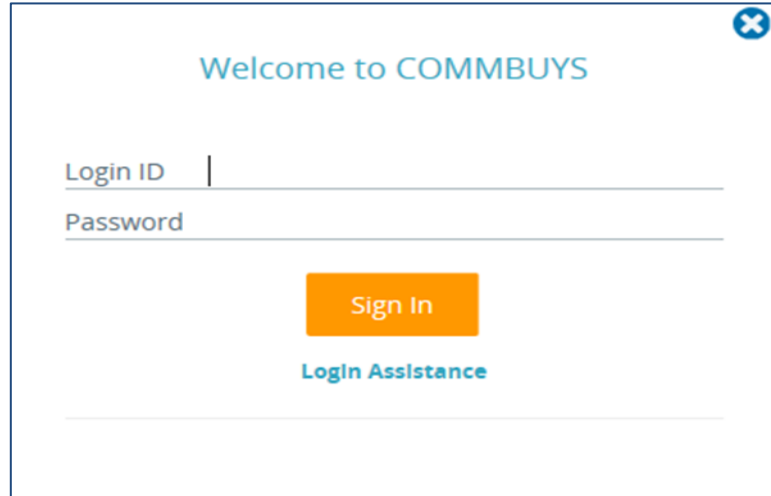
Individuals within an agency or department who receive and or create requests for payments will find this document useful. These users **MUST** process receiving within the Basic Purchaser role or within the Department Access role with permission to receive.

Screenshot	Directions
	<h3>Step 1: Signing In to COMMBUYS</h3> <ol style="list-style-type: none">1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking the hyperlink COMMBUYS.2. Click on the orange Sign In button in the upper right hand corner.

Job Aid: How to Cancel Items in COMMBUYS

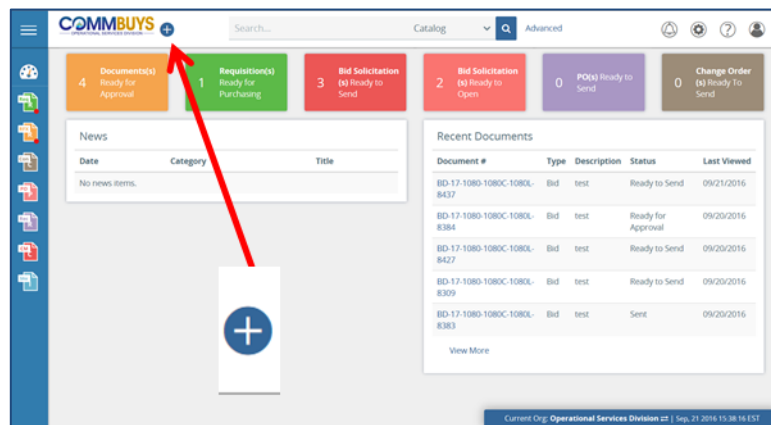
Screenshot

Directions



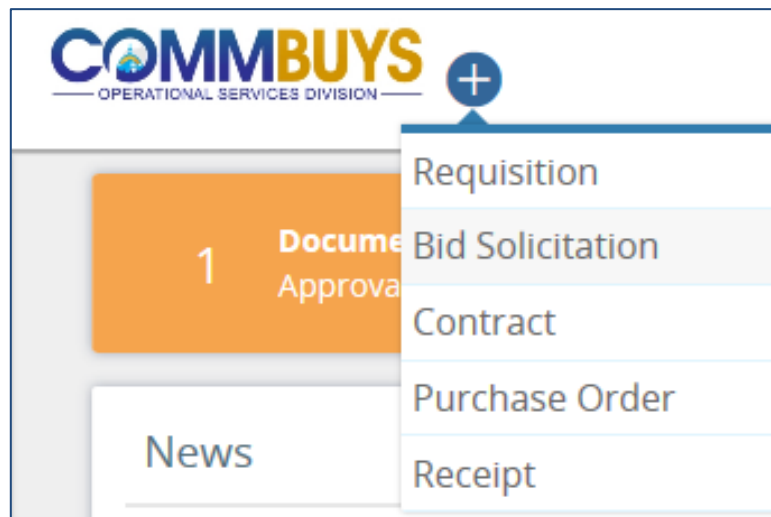
Step 2: Logging In

1. Enter your Login ID and Password.
2. Click on the **Sign In** button.



Step 3: Clicking the Add Documents Icon

Click on the **Add Documents** (plus sign) icon.



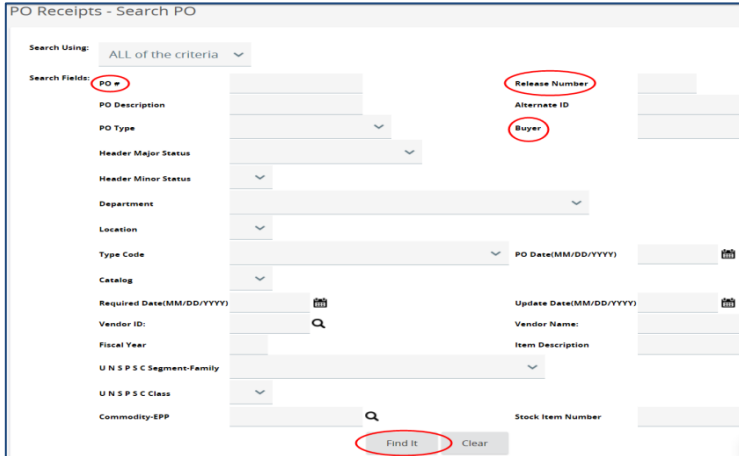
Step 4: Selecting Receipt

Select **Receipt** from the dropdown menu.

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Screenshot

Directions



Step 5: Locating a Purchase Order

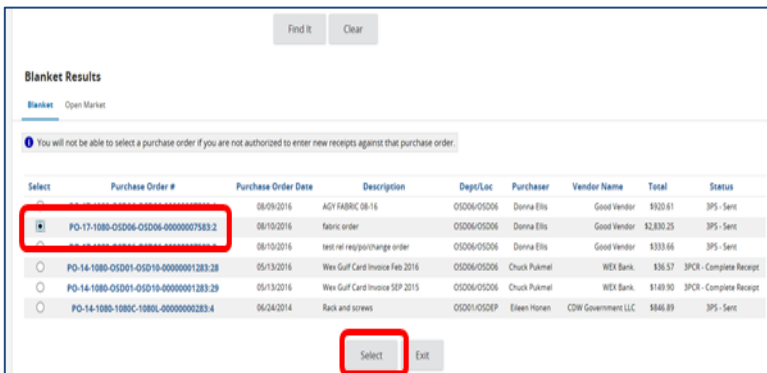
The PO Receipts – Search PO page displays.

1. Locate the PO using any of these search fields:
 - PO#
 - Release Number
 - Buyer
2. Press **Enter** on your keyboard or scroll to the bottom of the screen and click on the **Find It** button.

Step 6: Selecting a Purchase Order

The search results display at the bottom of your screen in the Blanket Results section.

1. In the **Select** column, click on the radio button next to the PO you want to receive.
2. Click on the **Select** button at the bottom of the screen.

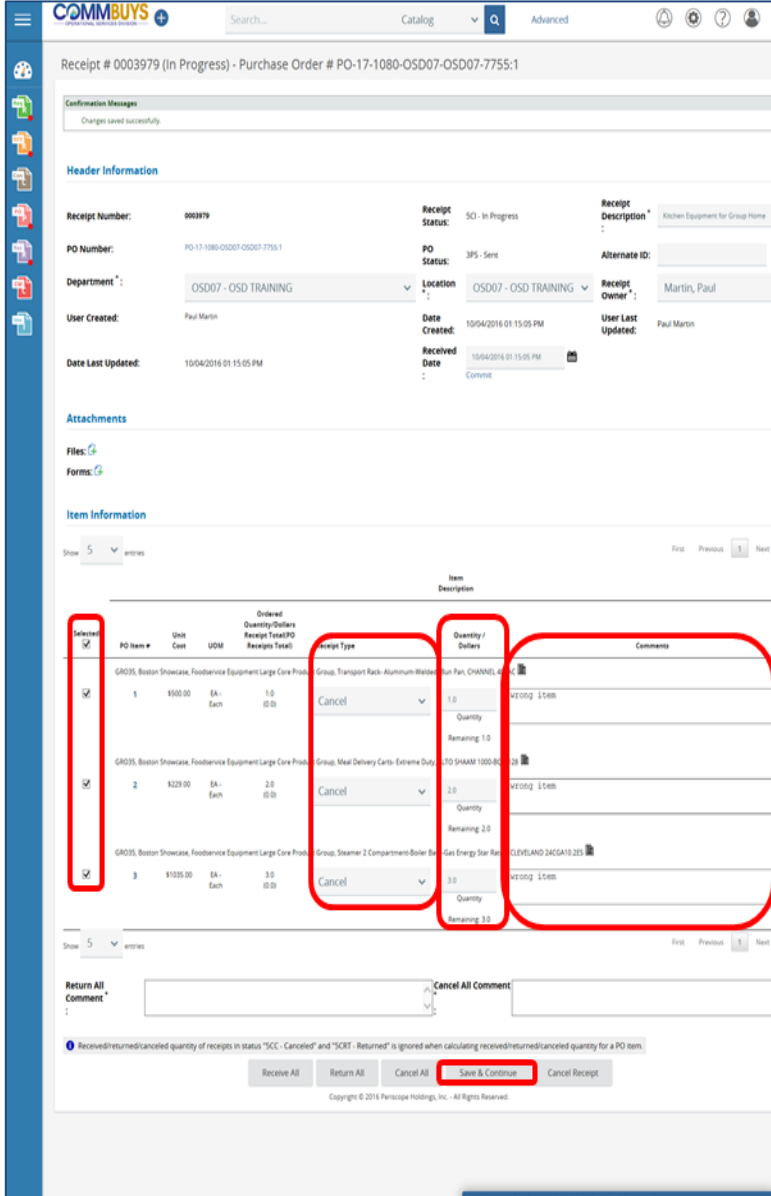


Select	Purchase Order #	Purchase Order Date	Description	Depts/Loc	Purchaser	Vendor Name	Total	Status
<input checked="" type="radio"/>	PO-17-1080-OSD06-OSD06-00000007583.2	08/09/2016	ADY FABRIC 08-16	OS006-OS006	Dianna Ellis	Good Vendor	\$920.61	SPS - Sent
<input type="radio"/>		08/10/2016	fabric order	OS006-OS006	Dianna Ellis	Good Vendor	\$2,830.25	SPS - Sent
<input type="radio"/>		08/10/2016	test:rel req/porchange order	OS006-OS006	Dianna Ellis	Good Vendor	\$333.66	SPS - Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD10-00000001283.28	05/13/2016	Wex Gulf Card Invoice Feb 2016	OS006-OS006	Chuck Pakmel	WEX Bank	\$36.57	3PCR - Complete Receipt
<input type="radio"/>	PO-14-1080-OSD01-OSD10-00000001283.29	05/13/2016	Wex Gulf Card Invoice SEP 2015	OS006-OS006	Chuck Pakmel	WEX Bank	\$149.90	3PCR - Complete Receipt
<input type="radio"/>	PO-14-1080-1080C-1080C-00000000283.4	06/24/2014	Rack and screws	OS001-OS02EP	Eileen Honen	CDW Government LLC	\$846.89	SPS - Sent

Job Aid: How to Cancel Items in COMMBUYS

Screenshot

Directions



Receipt # 0003979 (In Progress) - Purchase Order # PO-17-1080-OSD07-OSD07-7755:1

Confirmation Messages
Changes saved successfully

Header Information

Receipt Number: 0003979
PO Number: PO-17-1080-OSD07-OSD07-7755:1
Department: OSD07 - OSD TRAINING
User Created: Paul Martin
Date Last Updated: 10/04/2016 01:15:05 PM

Receipt Status: SC - In Progress
PO Status: SPS - Sent
Location: OSD07 - OSD TRAINING
Date Created: 10/04/2016 01:15:05 PM
Received Date: 10/04/2016 01:15:05 PM

Receipt Description: Kitchen Equipment for Group Home
Alternate ID:
Receipt Owner: Martin, Paul
User Last Updated: Paul Martin

Attachments

Files:
Forms:

Item Information

Selected	PO Item #	Unit Cost	UDOM	Ordered Quantity/Dollars Receipt Total/PO Receipts Total	Receipt Type	Quantity / Dollars	Comments
<input checked="" type="checkbox"/>	1	\$500.00	EA-	1.0 (0.0)	Cancel	1.0 Quantity Remaining 1.0	Group, Transport Rack- Aluminum Wheelbarrow Fan, CHANNEL
<input checked="" type="checkbox"/>	2	\$129.00	EA-	2.0 (0.0)	Cancel	2.0 Quantity Remaining 2.0	Group, Meal Delivery Cart- Extreme Duty 120 SHAMM 1000-B
<input checked="" type="checkbox"/>	3	\$1035.00	EA-	3.0 (0.0)	Cancel	3.0 Quantity Remaining 3.0	Group, Steamer 2 Compartment Boiler Bar Gas Energy Star Rat CLEVELAND 24CGA10 205

Return All Comment: Cancel All Comment

Received/returned/canceled quantity of receipts in status "SC - Canceled" and "SCRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.

Receive All Return All Cancel All **Save & Continue** Cancel Receipt

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Step 7: Locating the Items to Cancel

The **Receipt** page displays. The Receipt Type column in the Item Information section defaults to Receive for each item.

1. In the **Selected** column, click on the checkbox next to each item to be cancelled, or click the checkbox at the top of the column to select all items.
2. Using the dropdown arrows in the **Receipt Type** column, select **Cancel** for each item to be cancelled.
3. Enter the quantity to be cancelled in the **Quantity/Dollars** column.
4. Enter a comment or reason for the cancellation in the boxes in the **Comments** column or enter a comment in the Cancel All Column box at the bottom.
5. Scroll to the bottom of the page and click on the **Save & Continue** button.

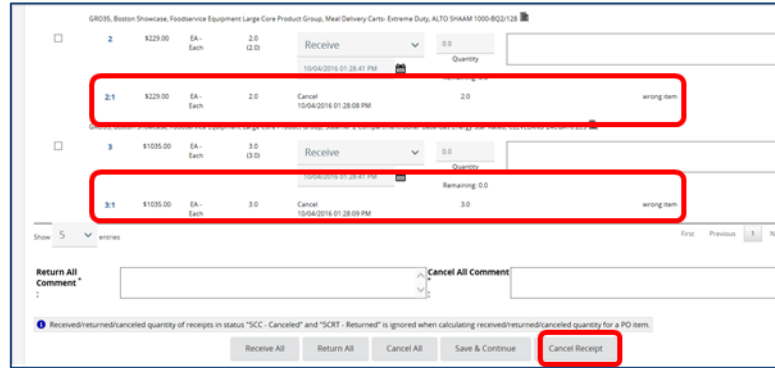
In this example all the items are being canceled.

NOTE: Items do not have to be received before they can be canceled.

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Screenshot

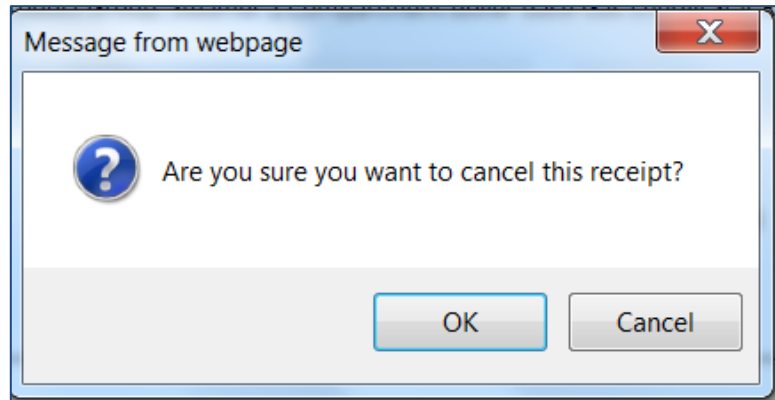
Directions



Step 8: Canceling the Items

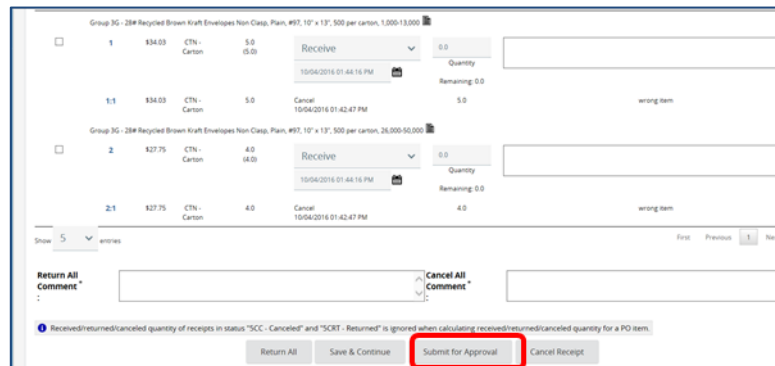
The screen redisplay with new lines added as 1:1, 2:1, 3:1, etc. containing information about the cancellation.

1. Click the **Cancel Receipt** button.
2. A popup dialogue box displays asking if you are sure you want to cancel. Click on the **OK** button.



Step 9: Submitting for Approval


When the screen redisplay, click on the **Submit for Approval** button at the bottom of the page.



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Receipt # 0003983 (In Progress) - Purchase Order # PO-14-1080-OSD01-OSD10-00000000038:550

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver: Add Approver

Save & Continue Cancel & Exit

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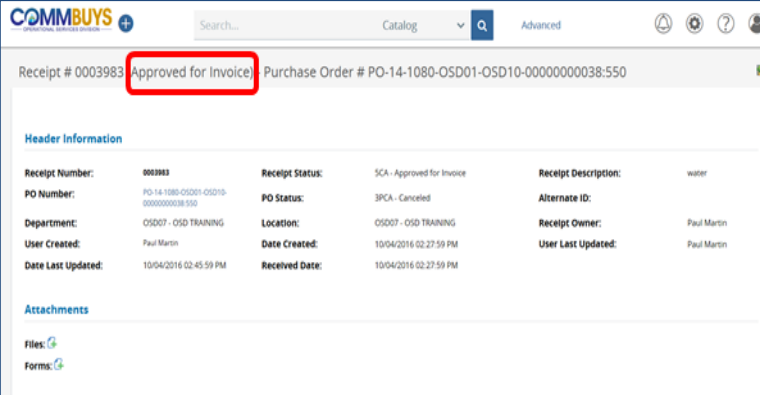
Step 10: Saving Approval

Each agency sets up their specific approval path for receipts.

1. Select the appropriate approval choice.
2. Click on the **Save & Continue** button.

The receipt is now in Ready for Approval status until approved.

In our scenario, we do not have an approval path for receiving items, so we selected Automatic approval and clicked on the **Save & Continue** button.



COMMBUYS Search... Catalog Advanced

Receipt # 0003983 **Approved for Invoice** Purchase Order # PO-14-1080-OSD01-OSD10-00000000038:550

Header Information

Receipt Number: 0003983	Receipt Status: SCA - Approved for Invoice	Receipt Description: water
PO Number: PO-14-1080-OSD01-OSD10-00000000038:550	PO Status: 3PCA - Canceled	Alternate ID:
Department: OSD07 - OSD TRAINING	Location: OSD07 - OSD TRAINING	Receipt Owner: Paul Martin
User Created: Paul Martin	Date Created: 10/04/2016 02:27:59 PM	User Last Updated: Paul Martin
Date Last Updated: 10/04/2016 02:45:59 PM	Received Date: 10/04/2016 02:27:59 PM	

Attachments

Files:

Forms:

Step 11: Verifying Approval

Once your receipt is approved, it will be placed in the Approved for Invoice status.