

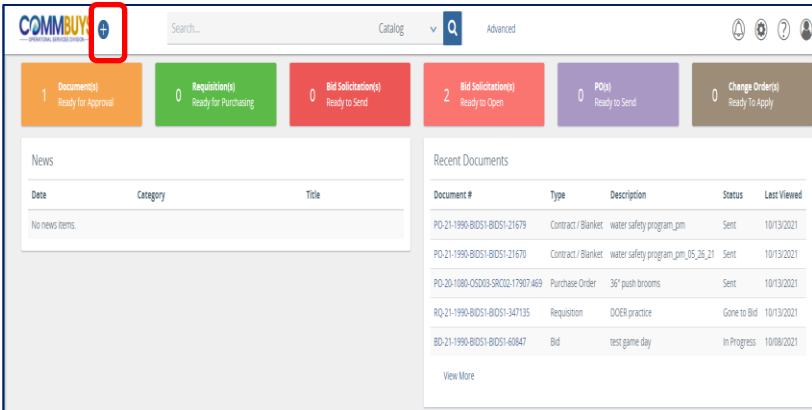
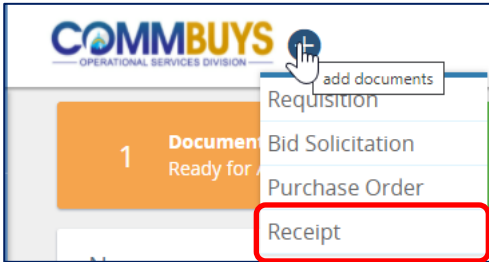
## Job Aid: How to Receive Items in COMMBUYS

This Job Aid shows how to:

- Receive 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 complete receipt or 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 receive all 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 given to receive.

| Screenshot  | Directions   |
|---|--|
|   | <p><b>Step 1: Clicking on the Add Documents icon.</b></p> <p>After logging in to COMMBUYS, click on the <b>Add Documents</b> (plus sign) icon.</p> |
|  | <p><b>Step 2: Selecting the Receipt</b></p> <p>Select <b>Receipt</b> from the dropdown menu.</p>   |

PO Receipts - Search PO

Search Using: ALL of the criteria

Search Fields:

PO # Release Number

PO Description Alternate ID

PO Type Buyer

Header Major Status

Header Minor Status

Department

Location

Type Code PO Date(MM/DD/YYYY)

Catalog

Required Date(MM/DD/YYYY) Update Date(MM/DD/YYYY)

Vendor ID: Vendor Name:

Fiscal Year Item Description

UNSPSC Segment-Family

UNSPSC Class

Commodity-EPP Stock Item Number

Find It Clear

### Step 3: Locating a Purchase Order

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

Blanket Results

[Blanket](#) [Open Market](#)

You will not be able to select a purchase order if you are not authorized to enter new receipts against that purchase order.

| Select                | Purchase Order #                 | Purchase Order Date | Description                              | Dept/Loc  | Purchaser      | Vendor Name                               | Total      | Status                 |
|-----------------------|----------------------------------|---------------------|--|-----------|----------------|---|------------|------------------------|
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119529 | 15/05/2021          | Sopar and Men Organizer From W.B. Mason  | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$113.20   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119530 | 15/05/2021          | May Order From W.B. Mason                | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$123.42   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119531 | 15/05/2021          | May Order From W.B. Mason                | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$113.20   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119532 | 15/05/2021          | May Order From W.B. Mason                | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$123.42   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119533 | 15/07/2021          | May Order From W.B. Mason                | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$123.42   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119536 | 15/10/2021          | Broder cips From W.B. Mason              | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$3.42     | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119537 | 15/10/2021          | Broder Cips From W.B. Mason              | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$3.42     | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119538 | 15/10/2021          | Broder Cips From W.B. Mason              | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$3.42     | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119539 | 15/10/2021          | Broder Cips From W.B. Mason              | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$3.42     | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119540 | 15/10/2021          | Desk Organizers From W.B. Mason          | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$59.94    | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119542 | 15/10/2021          | Desk Organizers From W.B. Mason          | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$59.94    | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119544 | 15/10/2021          | Desk Organizer From W.B. Mason           | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$90.84    | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-1590119553 | 10/06/2021          | Broders and Rulers From W.B. Mason       | B021-B001 | BI O'Malley/15 | W.B. Mason                                | \$40.83    | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-159211104  | 10/06/2021          | Copy Paper                               | B021-B001 | BI O'Malley/15 | Undermyer Muncie                          | \$2,193.00 | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-SRCH-157881173  | 09/11/2021          | Tires                                    | B021-B001 | BI O'Malley/15 | BridgeStone American Tire Operations, LLC | \$500.00   | SPCH- Complete Receipt |
| <input type="radio"/> | PO-19-1000-02003-02003-137325447 | 15/05/2021          | Safety vests and Cords From Federal      | B021-B001 | BI O'Malley/15 | Federal                                   | \$1,223.87 | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-02003-137325448 | 15/05/2021          | Handtrucks and safety vests From Federal | B021-B001 | BI O'Malley/15 | Federal                                   | \$1,124.20 | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-02003-137325449 | 15/05/2021          | Handtrucks and Vests From Federal        | B021-B001 | BI O'Malley/15 | Federal                                   | \$729.94   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-02003-137325450 | 15/05/2021          | G2B Form Federal                         | B021-B001 | BI O'Malley/15 | Federal                                   | \$729.94   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-02003-137325451 | 15/07/2021          | Hand Trucks and Vests From Federal       | B021-B001 | BI O'Malley/15 | Federal                                   | \$729.94   | SPS- Sent              |
| <input type="radio"/> | PO-19-1000-02003-02003-137325502 | 10/06/2021          | Safety Vests and Handtrucks From Federal | B021-B001 | BI O'Malley/15 | Federal                                   | \$373.08   | SPS- Sent              |

Select Exit

### Step 4: 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.

Receipt # 0032987 (In Progress) - Purchase Order # PO-19-1080-OSD03-SRC3-15822-1104

Confirmation Message  
Changes saved successfully.

**Header Information**

Receipt Number: W0287 Receipt Status: SC-In Progress Receipt Description\*: Copy Paper  
 PO Number: PO-19-1080-OSD03-SRC3-15822-1104 PO Status: SP5-Sent Alternate ID:  
 Department\*: BIDS1 - Procurement Department Location\*: BIDS1 - Procurement Receipt Owner\*: O'Malley, Bill  
 User Created: Bill O'Malley Date Created: 10/19/2021 11:17:14 AM User Last Updated: Bill O'Malley  
 Date Last Updated: 10/19/2021 11:17:14 AM Received Date: 10/19/2021 11:17:14 AM

**Attachments**

Files:  
Forms:

**Item Information**

Show 5 entries First Previous Next Last

| Selected                 | PO Item # | Unit Cost | UOM       | Ordered Quantity/Dollars<br>Receipt Total/PO Receipts Total | Item Description  | Receipt Type | Quantity / Dollars | Comments |
|--------------------------|-----------|-----------|-----------|---|---|--------------|--------------------|----------|
| <input type="checkbox"/> | 1         | \$40.00   | CS - Case | 50.00<br>(0.00)   | Rollsolv Copy Paper: 8.5 x 11 size, letter size, 20 lb. weight, white color, 5000 sheet case, 100% Recycled**Bullseye Brand Item - Discount Applied Based on Quantity | Receive      | 50 Quantity        |          |

Remaining 50

Return All Comment\*: Cancel All Comment\*:

Received/returned/canceled quantity of receipts in status "SCC - 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

### Step 5: Receiving

The **Receipt** page displays. The **Receipt Type** column defaults to **Receive**.

1. Ensure that each line item's receipt status is marked as **Receive**.

2. Scroll to the bottom of the page and click on the **Receive All** button.

www.training.commbuys.com says  
Do you want to Receive all remaining items on this Receipt?

OK

Cancel

### Step 6: Confirming Receipt

A pop-up box displays the message "Do you want to Receive all remaining items on this Receipt?" Click on the **OK** button to confirm.

Item Information

Show 5 entries

First Previous 1 Next Last

| Selected                 | PO Item # | Unit Cost | UOM       | Ordered Quantity/Dollars<br>Receipt Total(PO Receipts Total) | Receipt Type           | Quantity / Dollars | Comments |
|--------------------------|-----------|-----------|-----------|--|------------------------|--------------------|----------|
| <input type="checkbox"/> | 1         | \$48.86   | CS - Case | \$0.00<br>(\$0.00)   | Receive                | 0                  | Quantity |
|                          |           |           |           |  | 10/13/2021 11:20:21 AM | Remaining 0        |          |
|                          | 1:1       | \$48.86   | CS - Case | \$0.00   | Receiving              | 50                 |          |
|                          |           |           |           |  | 10/13/2021 11:17:14 AM |                    |          |

Show 5 entries

First Previous 1 Next Last

Return All Comment:  Cancel All Comment:

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

Receive All Return All Cancel All Save & Continue **Submit for Approval** Cancel Receipt

### Step 7: Submitting for Approval

The page redisplay and the **Ordered Quantity/Dollars Receipt Total (PO Receipts Total)** column is updated. The numbers in parentheses now reflect the amount received.

A new row has been added to each line item as 1:1, 2:1, 3:1, etc.

Click on the **Submit for Approval** button at the bottom of the page.

Receipt # 0032987 (In Progress) - Purchase Order # PO-19-1080-OSD03-SRC3-15822:1104

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

### Step 8: 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.

Receipt # 0032987 **(Approved for Invoice)** - Purchase Order # PO-19-1080-OSD03-SRC3-15822:1104

Header Information

|                    |                                  |                 |                            |                      |               |
|--------------------|----------------------------------|-----------------|----------------------------|----------------------|---------------|
| Receipt Number:    | 0032987                          | Receipt Status: | SCA - Approved for Invoice | Receipt Description: | Copy Paper    |
| PO Number:         | PO-19-1080-OSD03-SRC3-15822:1104 | PO Status:      | 3PCH - Complete Receipt    | Alternate ID:        |               |
| Department:        | B051 - Procurement Department    | Location:       | B051 - Procurement         | Receipt Owner:       | Bill O'Malley |
| User Created:      | Bill O'Malley                    | Date Created:   | 10/13/2021 11:17:14 AM     | User Last Updated:   | Bill O'Malley |
| Date Last Updated: | 10/13/2021 11:20:21 AM           | Received Date:  | 10/13/2021 11:17:14 AM     |                      |               |

Attachments

Files:

Forms:

Item Information

Show 5 entries

First Previous 1 Next Last

| Selected                 | Unit Cost | UOM       | Ordered Quantity/Dollars<br>Receipt Total(PO Receipts Total) | Receipt Type           | Quantity / Dollars | Comments |
|--------------------------|-----------|-----------|--|------------------------|--------------------|----------|
| <input type="checkbox"/> | \$48.86   | CS - Case | \$0.00<br>(\$0.00)   | Receive                | 0                  | Quantity |
|                          |           |           |  | 10/13/2021 11:20:21 AM | Remaining 0        |          |
|                          | 1:1       | \$48.86   | CS - Case  | \$0.00                 | Receiving          | 50       |
|                          |           |           |  | 10/13/2021 11:17:14 AM |                    |          |

### Step 9: Verifying Approval

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