

## Job Aid: How to Return Items in COMMBUYS

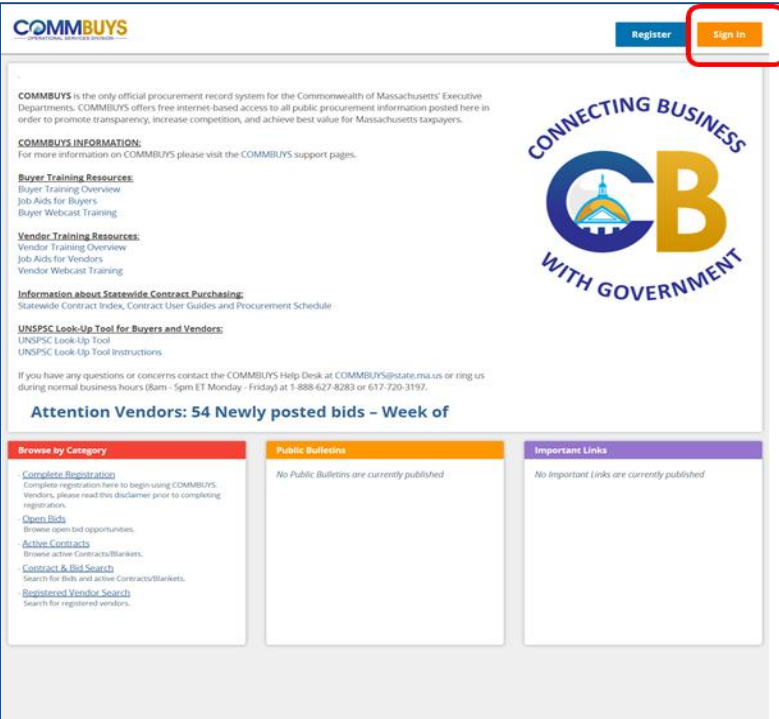
### This Job Aid Shows How To:

- Return Goods and Services in COMMBUYS

### Of Special Note:

Before a return can be processed, it must first be documented that the items were in fact delivered and received. 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 return items on a PO.

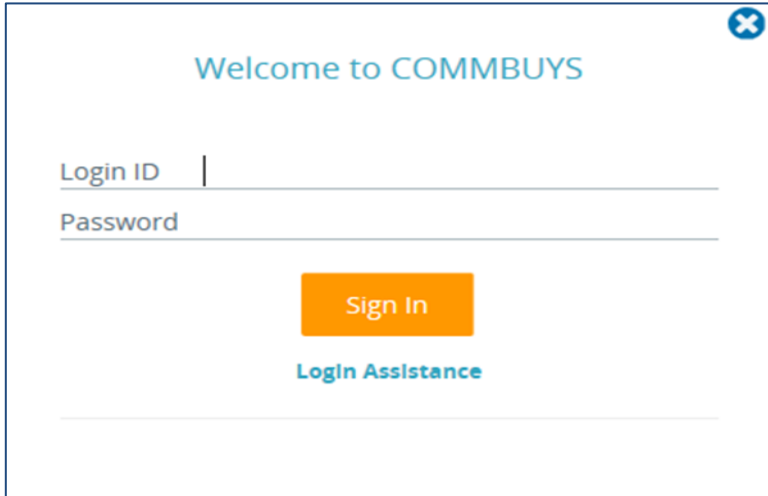
Individuals within an agency or department who receive and/or create requests for payments will find this document useful. These users **MUST** process receiving within the Basic Purchaser role or within the Department Access role with permission given to receive.

Screenshot	Directions
 <p>The screenshot shows the COMMBUYS website homepage. At the top right, there are two buttons: 'Register' and 'Sign In'. The 'Sign In' button is highlighted with a red rectangular box. The main content area includes a navigation menu on the left with categories like 'COMMBUYS INFORMATION', 'Buyer Training Resources', 'Vendor Training Resources', and 'Information about Statewide Contract Purchasing'. In the center, there is a large logo that says 'CONNECTING BUSINESS WITH GOVERNMENT' with a stylized 'CB' and a building icon. Below the logo, there is a section titled 'Attention Vendors: 54 Newly posted bids - Week of' followed by three columns: 'Browse by Category', 'Public Bulletins', and 'Important Links'.</p>	<h3>Step 1: Log-in to COMMBUYS</h3> <ol style="list-style-type: none"> <li>1. Launch the COMMBUYS website by entering the URL (<a href="https://www.commbuys.com">https://www.commbuys.com</a>) in the browser or by clicking the hyperlink <a href="https://www.commbuys.com">COMMBUYS</a>.</li> <li>2. Click on the orange <b>Sign In</b> button in the upper right hand corner.</li> </ol>

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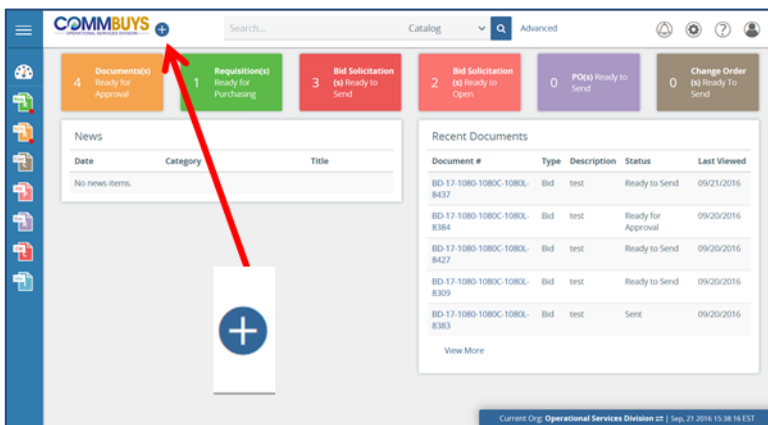
### Screenshot

### Directions



#### Step 2: Logging In

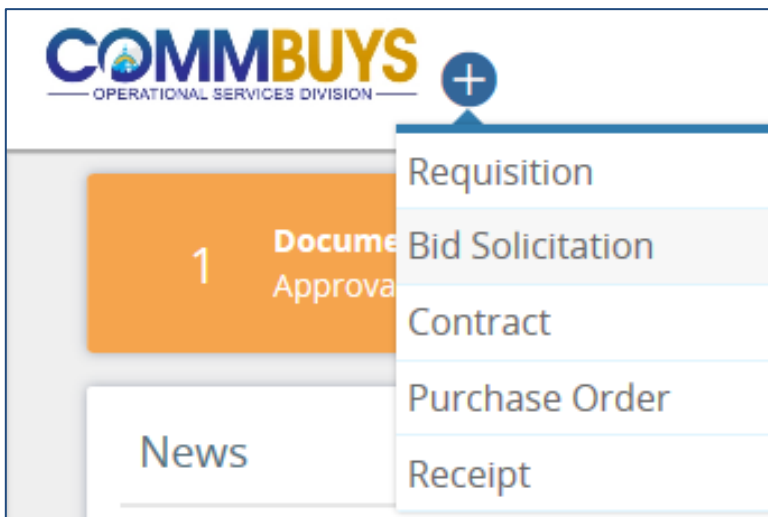
1. Enter your Login ID and Password.
2. Click on the **Sign In** button.



#### Step 3: Creating a New Receipt

In order to return an item, we must first show it was received in COMMBUYS.

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



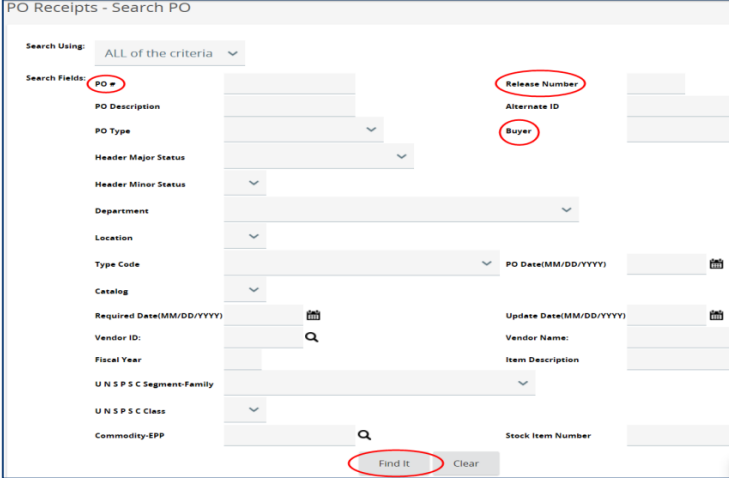
#### Step 4: Selecting Receipt

Select **Receipt** from the dropdown menu.

## Job Aid: How to Return Items in COMMBUYS

### Screenshot

### Directions



#### Step 5: Locating a Purchase Order

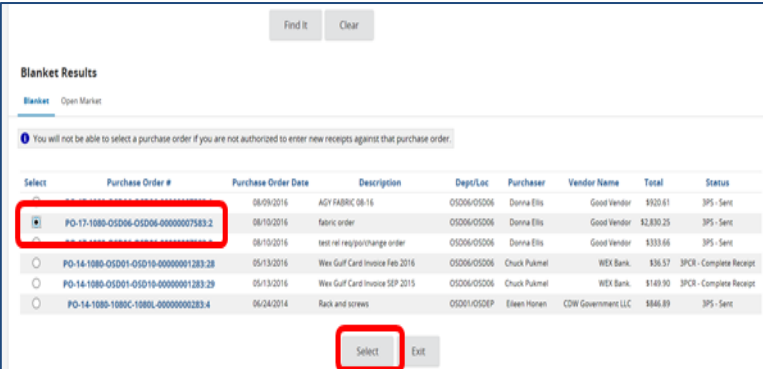
The PO Receipts – Search PO page displays.

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.

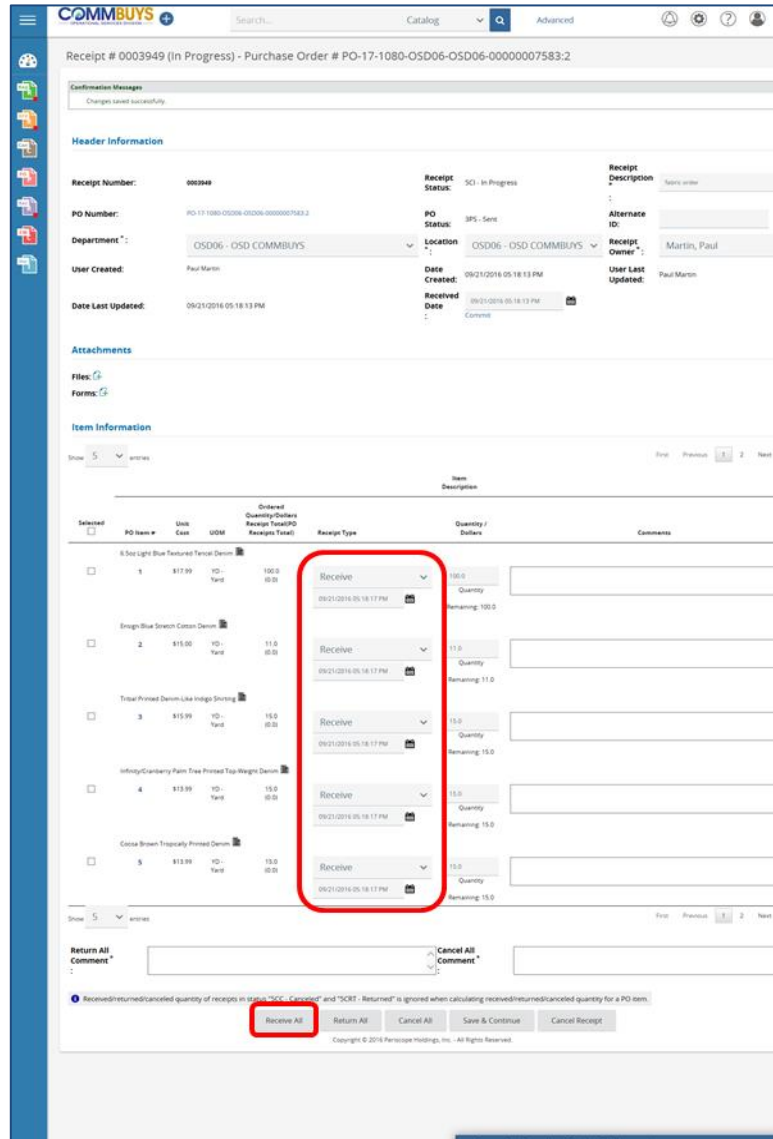


Select	Purchase Order #	Purchase Order Date	Description	Depo/Loc	Purchaser	Vendor Name	Total	Status
<input checked="" type="radio"/>	PO-17-1080-OSD06-OSD06-00000007583.2	08/09/2016	ADY FABRIC 08-16	OS006-OS006	Donna Ellis	Good Vendor	\$920.61	SPS - Sent
<input type="radio"/>		08/10/2016	fabric order	OS006-OS006	Donna Ellis	Good Vendor	\$2,830.25	SPS - Sent
<input type="radio"/>		08/10/2016	test re/req/purchase order	OS006-OS006	Donna Ellis	Good Vendor	\$333.66	SPS - Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD19-00000001283.28	05/13/2016	Wex Gulf Card Invoice Feb 2016	OS006-OS006	Chuck Palmel	WEX Bank	\$36.57	3PCR - Complete Receipt
<input type="radio"/>	PO-14-1080-OSD01-OSD19-00000001283.29	05/13/2016	Wex Gulf Card Invoice SEP 2015	OS006-OS006	Chuck Palmel	WEX Bank	\$149.90	3PCR - Complete Receipt
<input type="radio"/>	PO-14-1080-1080C-1080L-00000000283.4	06/24/2014	Rack and screws	OS001-OS00P	Eileen Honen	CDW Government LLC	\$846.89	SPS - Sent

# Job Aid: How to Return Items in COMMBUYS

## Screenshot

## Directions



Receipt # 0003949 (In Progress) - Purchase Order # PO-17-1080-OSD06-OSD06-0000007583-2

Confirmation Messages  
Changes saved successfully

Header Information

Receipt Number: 0003949  
PO Number: PO-17-1080-OSD06-OSD06-0000007583-2  
Department: OSD06 - OSD COMMBUYS  
User Created: Paul Martin  
Date Last Updated: 09/21/2016 05:18:13 PM

Receipt Status: SD - In Progress  
PO Status: 3PS - Sent  
Location: OSD06 - OSD COMMBUYS  
Date Created: 09/21/2016 05:18:13 PM  
Received Date: 09/21/2016 05:18:13 PM  
Alternate ID:   
Receipt Owner: Martin, Paul  
User Last Updated: Paul Martin

Attachments  
Files:   
Forms:   
Item Information

Selected	PO Item #	Unit Cost	UOM	Ordered Quantity/Status	Received Total/PO Receipts Total	Receipt Type	Quantity / Balance	Comments
<input type="checkbox"/>	1	\$17.99	YD - Yard	100.0	0.0	Receive	100.0 Quantity Remaining: 100.0	
<input type="checkbox"/>	2	\$15.00	YD - Yard	11.0	0.0	Receive	11.0 Quantity Remaining: 11.0	
<input type="checkbox"/>	3	\$15.99	YD - Yard	15.0	0.0	Receive	15.0 Quantity Remaining: 15.0	
<input type="checkbox"/>	4	\$13.99	YD - Yard	15.0	0.0	Receive	15.0 Quantity Remaining: 15.0	
<input type="checkbox"/>	5	\$13.99	YD - Yard	15.0	0.0	Receive	15.0 Quantity Remaining: 15.0	

Return All Comment:   
Cancel All Comment:   
Return All   
Cancel All   
Save & Continue   
Cancel Receipt

Receive All

### Step 7: Receiving

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

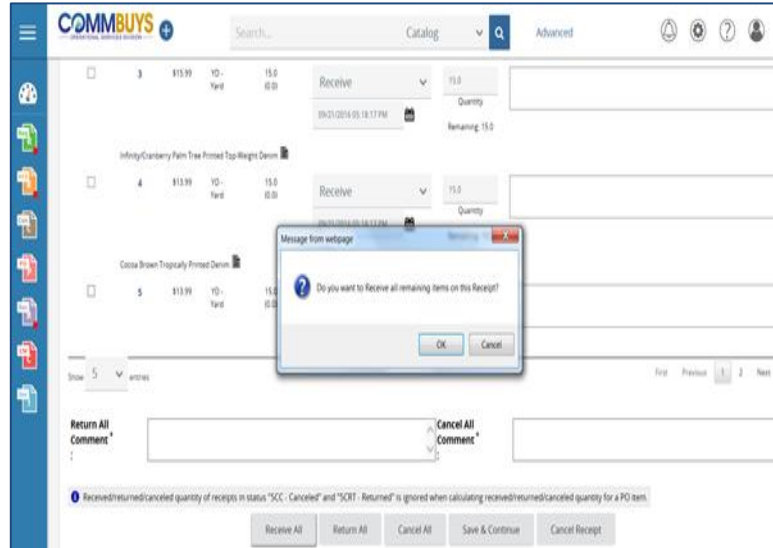
Before returning an item, you must first receive the items. In this example, we are going to receive and return all the items.

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.

## Job Aid: How to Return Items in COMMBUYS

### Screenshot

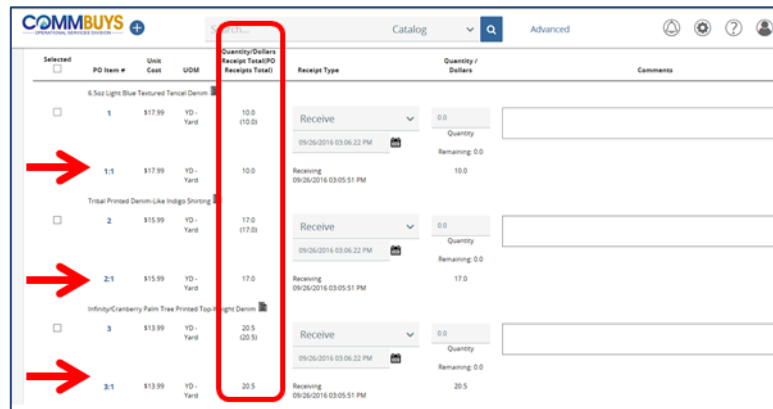
### Directions



#### Step 8: Confirming Receipt

A pop up box displays the message “Do you want to Receive all remaining items on this Receipt?”

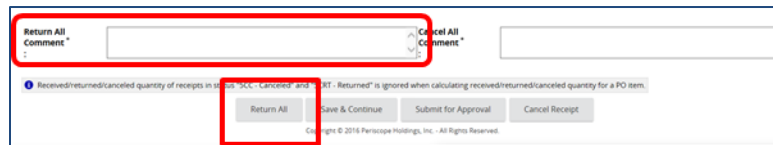
Click on the **OK** button to confirm.



#### Step 9: Returning All Items

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.

1. Enter comments about the return in the **Return All** comments box.
2. Click on the **Return All** button at the bottom of the page.
3. A pop up message displays the message **Do you want to Return all received items on this Receipt?** Click on the **OK** button to confirm.



If you do not want to return all the items, go to the applicable line item and in the Receipt Type column, choose **Return** in the dropdown. A comment is required. Click on the **Save & Continue** button.

## Job Aid: How to Return Items in COMMBUYS

### Screenshot

### Directions

PO Item #	Unit Cost	UOM	Receipt Total (PO Receipt Total)	Receipt Type	Quantity / Dollars	Comments
1	\$17.99	YD - Yard	10.0 (18.0)	Receive	0.0	
1.1	\$17.99	YD - Yard	10.0	Receiving	10.0	
1.2	\$17.99	YD - Yard	10.0	Return	10.0	product defective
Total Priced Item-Like Indigo Shirts						
2	\$15.99	YD - Yard	17.0 (17.0)	Receive	0.0	
2.1	\$15.99	YD - Yard	17.0	Receiving	17.0	
2.2	\$15.99	YD - Yard	17.0	Return	17.0	product defective
Infinity/Cariberry Palm Tree Priced Top-Waist Denim						
3	\$13.99	YD - Yard	25.5 (25.5)	Receive	0.0	

#### Step 10: Verifying the Return

The Receipt page displays with a new line added (i.e. 1:2, 2:2, etc.) showing the time and date of the return entry. The right side of the screen displays the return comments.

Return All Comment \*

Cancel All Comment \*

Received/returned/canceled quantity of receipts in status "SCC - Canceled" and "SRT - Returned" is ignored when calculating the quantity for a PO item.

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

#### Step 11: Submitting for Approval

Once you have verified the return, scroll to the bottom of the screen and click on the **Submit for Approval** button.

Receipt # 0003963 (In Progress) - Purchase Order # PO-17-1080-OSD06-OSD06-00000007583:3

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 12: 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.

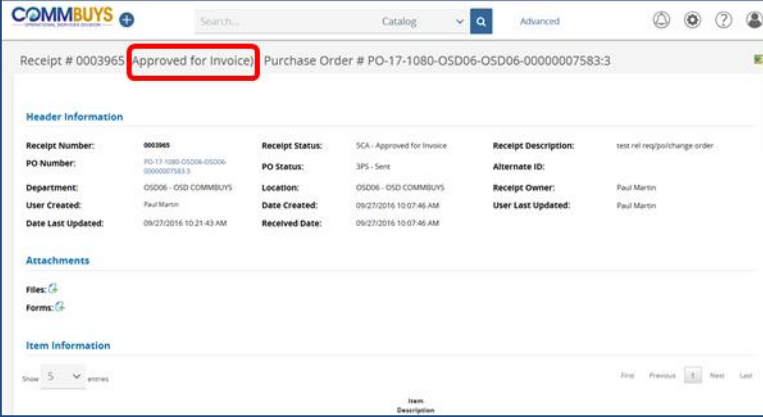
The return is now in Ready for Approval status until approved.

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

## Job Aid: How to Return Items in COMMBUYS

### Screenshot

### Directions



Receipt # 0003965 (Approved for Invoice) Purchase Order # PO-17-1080-OSD06-OSD06-0000007583:3

**Header Information**

<b>Receipt Number:</b> 0003965	<b>Receipt Status:</b> SCA - Approved for Invoice	<b>Receipt Description:</b> test ref req/purchase order
<b>PO Number:</b> PO-17-1080-OSD06-OSD06-0000007583:3	<b>PO Status:</b> 3PS - Sent	<b>Alternate ID:</b>
<b>Department:</b> OS006 - OSD COMMBUYS	<b>Location:</b> OSD06 - OSD COMMBUYS	<b>Receipt Owner:</b> Paul Martin
<b>User Created:</b> Paul Martin	<b>Date Created:</b> 09/27/2016 10:07:46 AM	<b>User Last Updated:</b> Paul Martin
<b>Date Last Updated:</b> 09/27/2016 10:21:43 AM	<b>Received Date:</b> 09/27/2016 10:07:46 AM	

**Attachments**

Files:

Forms:

**Item Information**

Show 5 entries

Item Description

### Step 13: Verifying Approval

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