

Job Aid:

How to Return Items in COMMBUYS

This Job Aid shows how to:

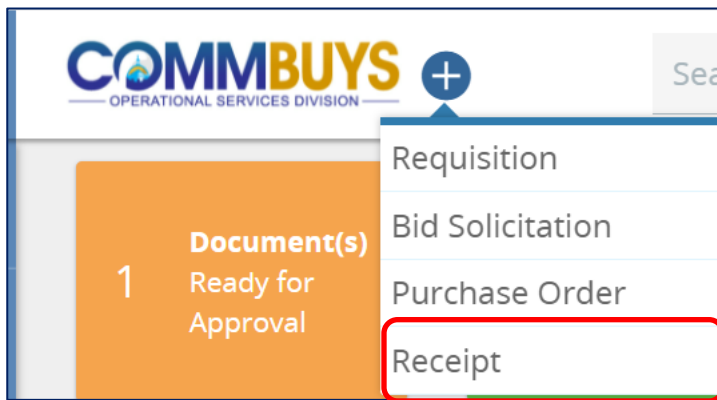
- Return Goods and Services in COMMBUYS

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>Step 1: Creating a New Receipt</p> <p>In order to return an item, it must be verified that it was received in COMMBUYS.</p> <p>Click on the Add Documents (plus sign) icon next to the COMMBUYS logo.</p>



Step 2: Selecting the Receipt

Select **Receipt** from the dropdown menu.

Step 3: 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.

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 Exit

Screenshot

Directions

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.

Click on the **Select** button at the bottom of the screen.

15981:15983			O'Malley/S					
<input type="radio"/>	PO-19-1080-OSD03-SRC3-15822:1104	10/06/2021	Copy Paper	BIDS1/BIDS1	Bill O'Malley/S	Lindenmeyr Munroe	\$2,193.00	3PCR - Complete Receipt
<input type="radio"/>	PO-19-1080-OSD03-SRC01-15789:173	09/14/2021	Tires	BIDS1/BIDS1	Bill O'Malley/S	Bridgestone Americas Tire Operations, LLC	\$500.00	3PCR - Complete Receipt
<input type="radio"/>	PO-19-1080-OSD03-OSD03-13725:447	05/05/2021	Safety vests and Carts From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$1,232.87	3PS - Sent
<input type="radio"/>	PO-19-1080-OSD03-OSD03-13725:448	05/05/2021	Hand trucks and safety vests From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$1,126.20	3PS - Sent
<input type="radio"/>	PO-19-1080-OSD03-OSD03-13725:449	05/06/2021	Hand trucks and Vests From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$729.94	3PS - Sent
<input type="radio"/>	PO-19-1080-OSD03-OSD03-13725:450	05/06/2021	G28 From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$729.94	3PS - Sent
<input type="radio"/>	PO-19-1080-OSD03-OSD03-13725:451	05/07/2021	Hand Trucks and Vests From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$729.94	3PS - Sent
<input checked="" type="radio"/>	PO-19-1080-OSD03-OSD03-13725:502	10/06/2021	Safety Vests and Hand trucks From Fastenal	BIDS1/BIDS1	Bill O'Malley/S	Fastenal	\$373.08	3PS - Sent

Select

Exit

Step 5: Receiving

The **Receipt** page displays. The Receipt Type 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.

Item Information

Show 5 entries

Selected	PO Item #	Unit Cost	UOM	Ordered Quantity/Dollars	Receipt Type	Quantity / Dollars	Comments
<input type="checkbox"/>	1	\$16.996	EA- Each	8.0 (0.0)	Receive	8 Quantity	
					10/13/2021 01:01:00 PM	Remaining: 0	
<input type="checkbox"/>	2	\$118.525	EA- Each	2.0 (0.0)	Receive	2 Quantity	
					10/13/2021 01:01:00 PM	Remaining: 2	

Return All Comment:
Cancel All Comment:

Step 6: Confirming the Receipt

A popup box displays the message "Do you want to Receive all remaining items on this Receipt?"

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

www.training.commbuys.com says

Do you want to Receive all remaining items on this Receipt?

Item Information

Show 5 entries

Selected	PO Item #	Unit Cost	UOM	Ordered Quantity/Dollars Receipt Total/PO Receipts Total	Receipt Type	Quantity / Dollars	Comments
<input type="checkbox"/>	1	\$16.996	Bk- Each	0.0 (0.0)	Receive	0 Quantity	
	1:1	\$16.996	Bk- Each	0.0	Receiving	0	
<input type="checkbox"/>	2	\$118.5525	Bk- Each	2.0 (0.0)	Receive	0 Quantity	
	2:1	\$118.5525	Bk- Each	2.0	Receiving	2	

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.

Step 7: Returning All Items

The page redispays 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.

1. Enter comments about the return in the **Return All Comment** 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.

Item Information

Show 5 entries

Selected	PO Item #	Unit Cost	UOM	Ordered Quantity/Dollars Receipt Total/PO Receipts Total	Receipt Type	Quantity / Dollars	Comments
<input type="checkbox"/>	1	\$16.996	Bk- Each	0.0 (0.0)	Receive	0 Quantity	
	1:1	\$16.996	Bk- Each	0.0	Receiving	0	
	1:2	\$16.996	Bk- Each	0.0	Return	0	Just because
<input type="checkbox"/>	2	\$118.5525	Bk- Each	2.0 (0.0)	Receive	2 Quantity	
	2:1	\$118.5525	Bk- Each	2.0	Receiving	2	
	2:2	\$118.5525	Bk- Each	2.0	Return	2	Just because

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.

Step 8: 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.

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

Screenshot

Directions

Receipt # 0032989 (In Progress) - Purchase Order # PO-19-1080-OSD03-OSD03-13725:502

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

Step 10: Saving the 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**.

Receipt # 0032989 (Approved for Invoice) - Purchase Order # PO-19-1080-OSD03-OSD03-13725:502

Header Information

Receipt Number:	0032989	Receipt Status:	SCA - Approved for Invoice	Receipt Description:	Safety Vests and Hand Trucks From Federal
PO Number:	PO-19-1080-OSD03-OSD03-13725:502	PO Status:	SPE - Sent	Alternate ID:	
Department:	80031 - Procurement Department	Location:	80031 - Procurement	Receipt Owner:	Bill O'Malley
User Created:	Bill O'Malley	Date Created:	10/19/2021 01:00:59 PM	User Last Updated:	Bill O'Malley
Date Last Updated:	10/19/2021 02:16:12 PM	Received Date:	10/19/2021 01:00:59 PM		

Attachments

Files:

Forms:

Step 11: Verifying the Approval

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