

# Create a Receiving Doc

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## Overview

Receiving Docs are transactions that show what Items have been shipped by the Vendor and actually received at your location.

There are three (3) ways to complete Receiving:

- Receiving *without* Purchase Orders

Receiving Docs usually correspond to Purchase Orders to show how much of the PO still needs to be filled. However, Receiving Docs can be created *without Purchase Orders*.

- [Creating a New Receiving Doc](#)

You can create a new Receiving Doc from the Side Menu.

- [Processing a Receiver: Generated Receiving Doc](#)

A Receiving Doc must be generated first in order to receive a Purchase Order.

- [Multiple Purchase Orders](#)

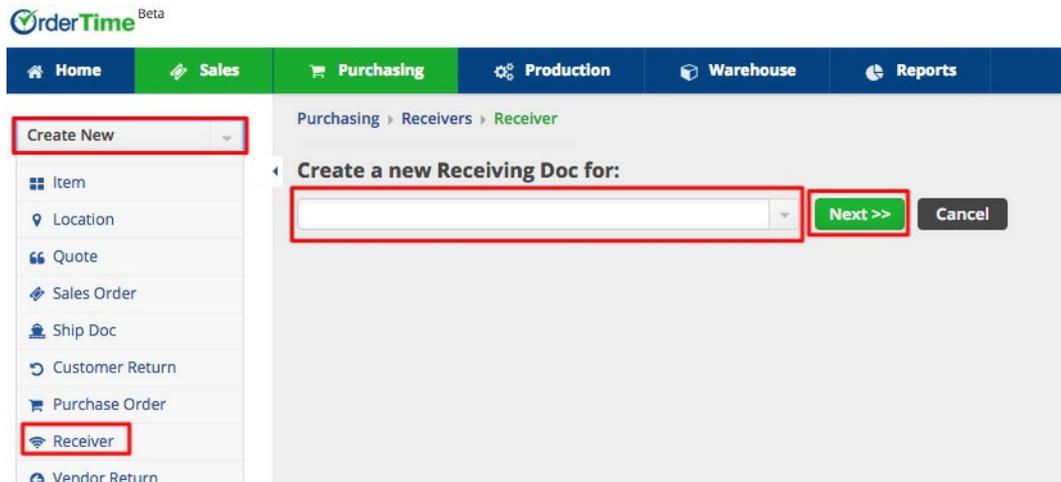
You can also create a Receiving Doc for a vendor with multiple purchase orders.

## Creating a New Receiving Doc

To generate a new Receiving Doc from the Side Menu > Create New > Receiver, follow the steps below.

1. Open the side menu and click on the Create New drop-down menu.

2. Select Receiver from the menu.
3. On the screen, type the Vendor's name. When the Vendor's name has been enter or selected from the drop-down menu, click Next>>.



4. Once you click on Next>>, the next screen will prompt you to enter the information below:

- Select Date from the date box.
- Enter the Expected Date.
- Under the Default tab select the following from each drop down menu:
  - Location
  - Bill Address
  - Class
  - Terms
  - Ship Method
  - Total Packages
  - Total Weight
  - Tracking No.
  - Invoice No.

5. Enter information relevant to the PO under the Memo & Internal Notes:

- Notes on the memo will be displayed on the PO
- Internal Notes will only be view by reviewing the PO

6. Under the Custom tab, you can provide specifications based on your preferences.

7. Click Save when done.

Purchasing » Receivers » Receiver

**Receiver** Save Cancel

Vendor: Service Provider 1

No.  Date  Expected Date

Defaults | Memo & Internal Notes | Custom

Location:

Bill Address:

Class:

Terms:

Ship Method:

Total Packages:

Total Weight:

Tracking No:

Invoice No.:

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## Processing a Receiver

To receive a Purchase Order, a Receiving Doc must be generated. A Receiving Doc is created once a PO status has been changed from Processing to Approve or Sent and a Receiving Doc is generated under Receivers tab. This process is usually completed by the employee generating the PO.

Purchase Order must be Approved before they can be received.

When a Receiving Doc has been generated, complete the following steps to receive a Purchase Order:

1. Open the side menu and click on **Open Full List**.
2. Select **Purchase Orders**.

The screenshot shows the OrderTime Home page. On the left, a navigation menu has 'Purchase Orders' highlighted. The main area displays a calendar for Thursday, August 24, 2017, with time slots from 8am to 6pm. Below the calendar is an 'Open Tasks' section with a table of tasks:

ACTIVITY TYPE	SUBJECT	DUE DATE	DESCRIPTION	ASSIGNED TO	PRIORITY	ACTIONS
Task	Reminders date	5/31/2017 02:00 AM	Reminders pop hrs. Today filter on home page	Ian Benoit	Critical	🗑️
Task	Value adjustments	6/2/2017 04:00 PM	Something is up with the value adjustments validation and details page	Ian Benoit	Normal	🗑️
Call	Hello	8/16/2017 08:00 AM		Ian Benoit	Normal	🗑️
Call	Make call	8/19/2017 09:30 AM		Ian Benoit	Normal	🗑️

3. On the **Purchase Order** screen, enter the **Purchase Order number**. You also have the option to sort your POs by selecting from the drop-down menu (i.e. Location, Memo, Bill Address Email, Bill Address Fax, Phone Number, Company Name, Zip code, etc.).

- Enter the **PO number**, then press **Enter**.

The screenshot shows the 'Purchasing - Purchase Orders' screen. A search bar at the top contains the number '9062'. Below it is a table of purchase orders:

NO.	VENDOR	DATE	PROMISE DATE	STATUS	DROP SHIP	ACTIONS
9062	1800 Got Junk SE Florida	8/22/2017	8/22/2017	Closed	○	🗑️

4. Select the **Purchase Order number** from the Listing.

This is a close-up of the 'Purchase Orders' table. The first row is highlighted, showing the PO number '9062' in the 'NO.' column, which is circled in red.

NO.	VENDOR	DATE	PROMISE DATE	STATUS	DROP SHIP	ACTIONS
9062	1800 Got Junk SE Florida	8/22/2017	8/22/2017	Closed	○	🗑️

5. The Purchase Order screen will open. Select the **Receivers** tab and click the **Receiving Doc line item** under the **NO** column.


 If there is no Receiving Doc on the listing, the PO has not generated a Receiving Doc. TO CREATE a Receiving Doc, select the **Receivers** tab and click on the **+Receiver** icon. Once this function is completed, a Receiving Doc will be displayed in the listing under the **Receivers** tab. Click on the **Receiving Doc line item** under the **NO** column.

Once you have opened your Receiving Doc, you can begin the process of receiving your items.

- On the Receiving Doc screen, click on the Items tab and inspect your items.
- If there is a need to change the Item quantity, click on the Note icon under the ACTIONS column.
- Under the Edit icon, you can make order changes.

You can directly change the field values by clicking on the line item (item row). Field boxes will appear, and you can add details or edit the information accordingly.

When you click on the **Edit** icon, the following options are available:

Under the **General** tab, you have the option to change the item quantity received under the Purchase Order. Click on **Save** when your changes are completed.

The screenshot shows the 'Line item for Receiver 720' form. The 'General' tab is selected. The 'Quantity' field is highlighted with a red box, and a blue arrow points to it. The form includes fields for Description, Quantity, Cost, UOM, Part No, Class, and Line Instructions. The 'Save' and 'Reset' buttons are visible in the top right corner.

Under the **Bins** tab, you can move your Items to a new Bin Location at your warehouse.

- Based on you Bin assignments, you can select a new location from the list in the drop down menu.
- Enter the item quantity for this location.
- Click on **Save** when done.

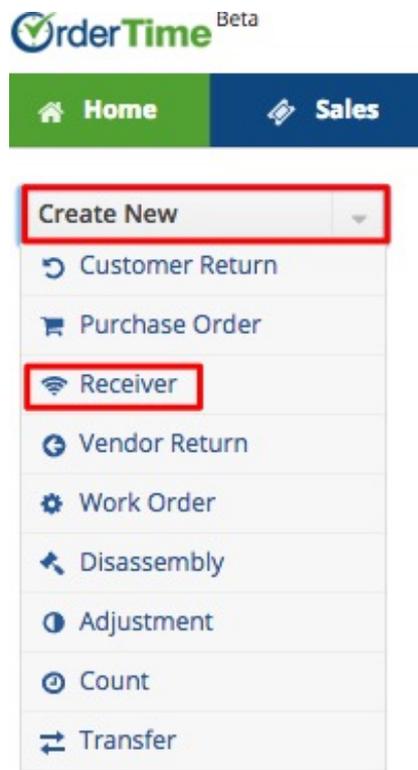
The screenshot shows the 'Line item for Receiver 720' form with the 'Bins' tab selected. The 'Enter Bin' dialog box is open, showing a list of bin locations (A-1 (HQ), A-10 (HQ), A-11 (HQ), A-12 (HQ), A-2 (HQ)) and a quantity field. The 'General' tab of the dialog is highlighted with a red box, and a blue arrow points to the quantity field. The 'Save' and 'Close' buttons are visible in the bottom right corner of the dialog.

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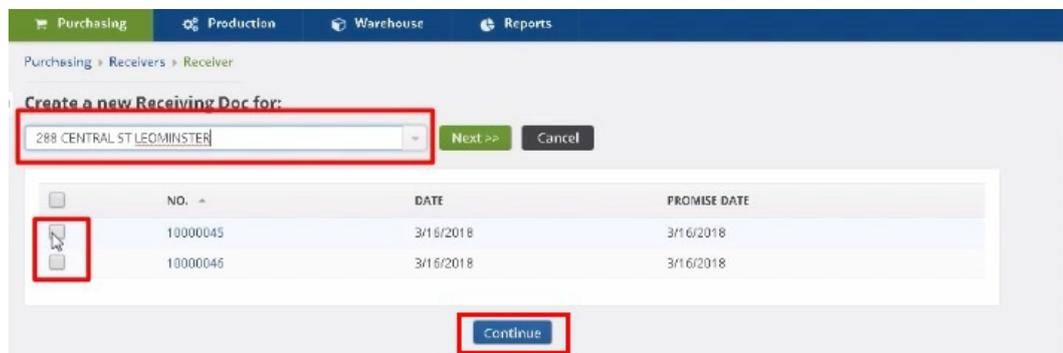
## Receiving Multiple Purchase Orders

You can receive multiple POs at the same time by following these steps:

1. Click **Create New**.
2. Select **Receiver**.



3. Enter the **Vendor name**. Once the vendor's name is entered, a list of POs will be displayed.
4. Select the **POs** that you want to receive by clicking on the corresponding boxes.
5. Click **Continue**.



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## Receiving Status Menu

Once all the necessary information has been entered into your Receiving Doc, you are ready to proceed to change the status of the Receiving Doc. On the top right side of the screen next to **Status**, use the drop-down menu to change the status of your Receiving Doc. The following status options will be available for your Receiving Doc:

- **Processing:** Processing means you are in the process of recording the Receiving Doc information.
- **In Transit:** Items for this Receiving Doc are currently in transit, this is usually used for Drop Ship deliveries.
- **Received:** Items for the Receiving Doc have been received and processed at the warehouse.
- **Closed:** The Receiving Doc is closed.

The screenshot shows the OrderTime interface for a Receiving Doc. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main header shows 'Receiver - 720' with buttons for 'Create PDF', 'EDIT', 'RETURN', and 'ADD COST'. A 'Status' dropdown menu is open, showing options: 'Received', 'Processing', 'In Transit', 'Received', and 'Closed'. A blue arrow points to the 'Status' label. Below the header, there are sections for 'General' (No. 720, Vendor: 1800 GotJunk SE Florida, Date: 8/23/2017, Expected Date: 8/23/2017), 'Bill Address' (1800 GOT JUNK SE FLORIDA, 4436 FOX RIDGE DR, STE 2, FAB, HOLLYWOOD, FL 33021, USA), and 'Summary' (Revision: 1, Subtotal: 26.00, Charges: 0.00, Total Amount: 26.00). The 'Items' section is visible below, showing a table with columns: ITEM, DESCRIPTION, QUANTITY, UOM, COST, EXT., LINKED QUANTITY ORDERED, LINKED QUANTITY FILLED, and ACTIONS.

ITEM	DESCRIPTION	QUANTITY	UOM	COST	EXT.	LINKED QUANTITY ORDERED	LINKED QUANTITY FILLED	ACTIONS
01022A	Seal, fric. hub grease	1,000	EA	13,000	13,000	1,000	1,000	🗑️ 🔄
01022A	Seal, fric. hub grease	1,000	EA	13,000	13,000	1,000	1,000	🗑️ 🔄

When you do a Receiver the items that are in inventory are listed as In Transit until the status is changed to Received, then it becomes Available for sale.

When you are ready to receive the Items on your Receiving Doc, select **Received** from the **Status** drop-down menu.

When it is marked as Received or Closed, it goes in to synchronization to update the Accounts Payable.

The screenshot shows the OrderTime interface for a Receiving Doc. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main header shows 'Receiver - 24' with buttons for 'EDIT' and 'ADD COST'. The 'Status' dropdown menu is set to 'Received'. Below the header, there are sections for 'General' (No. 24, Vendor: 289 CENTRAL ST LEOMINSTER, Date: 3/16/2018, Expected Date: 3/16/2018), 'Bill Address', and 'Summary' (Revision: 1, Subtotal: 116.50, Charges: 0.00, Total Amount: 116.50). The 'Items' section is visible below, showing a table with columns: ITEM, DESCRIPTION, QUANTITY, UOM, COST, EXT., LINKED QUANTITY ORDERED, LINKED QUANTITY FILLED, and ACTIONS. A red box highlights the 'Accounting Integration' section, which contains the text: 'This transactions in scheduled to sync: Delete from Sync Queue'. A 'Close' button is visible next to the text.

ITEM	DESCRIPTION	QUANTITY	UOM	COST	EXT.	LINKED QUANTITY ORDERED	LINKED QUANTITY FILLED	ACTIONS
106		100	EA	0.74	74.00	10000046		🗑️ 🔄

## Printing your Receiving Doc

A Receiving Doc can be printed and emailed to your Vendor.

1. Click on the *Create PDF* icon next to the Purchase Order number.
2. A pop-up window will open and you can select *Save and Email* icon.
3. The *Send Email* screen will pop up, enter the information requested. You will have the option to attach additional information or carbon copy individuals in your company. Select the appropriate template from the Template drop-down box.

[More about Order Management with Order Time](#)