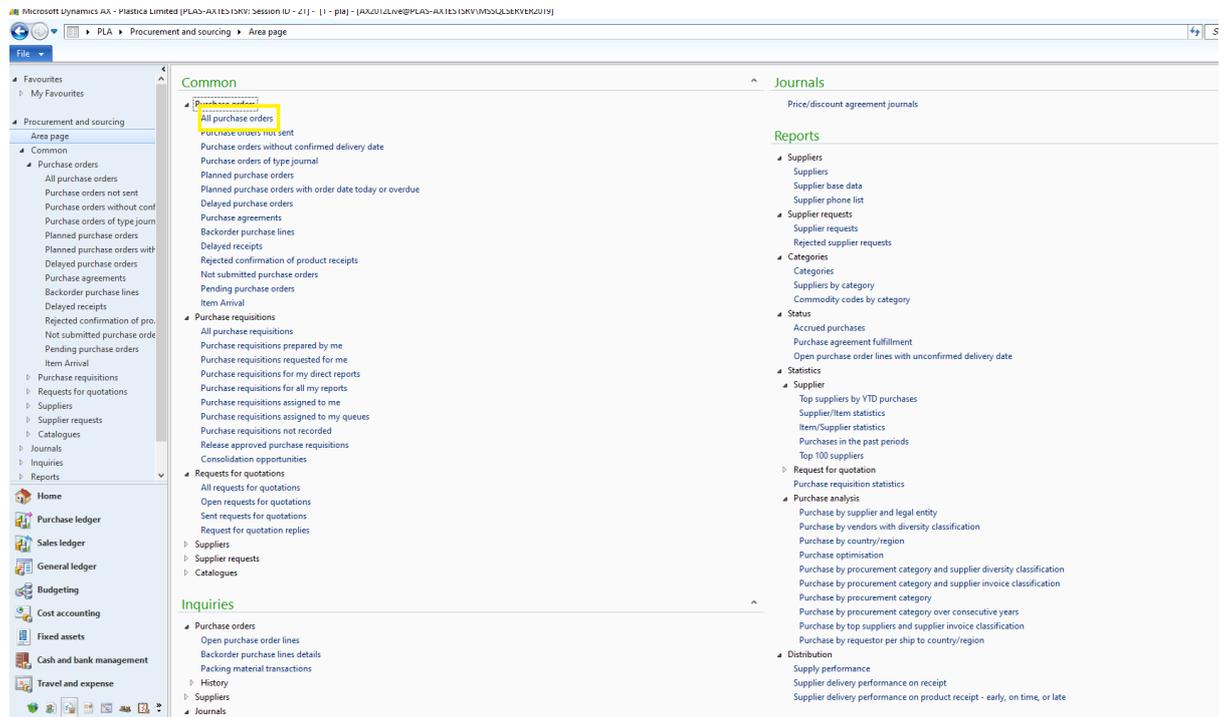


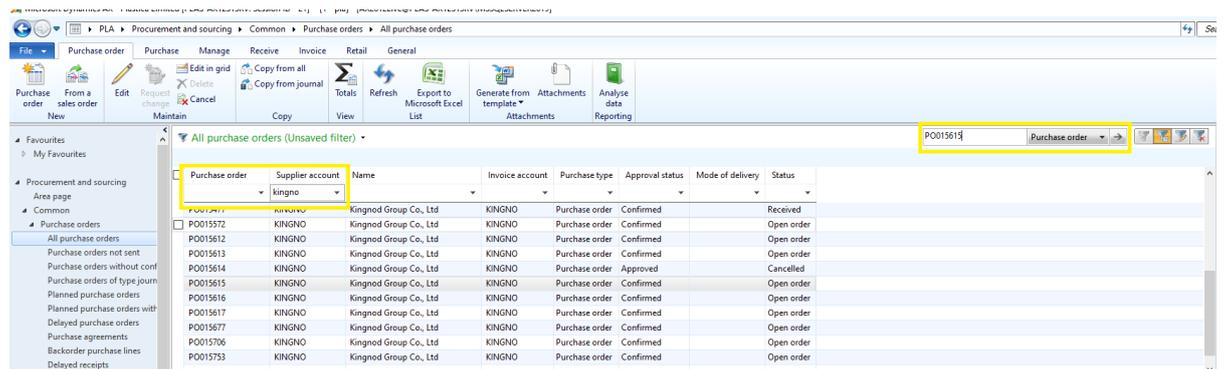
How to Receipt a delivery

Receiving a purchase order in AX

1. Go to procurement and sourcing > Purchase orders > All purchase orders



2. Enter the purchase order number you want to receipt, you can either enter this in the search bar or in the purchase order column filter. If you do not know the purchase order number you can search by supplier

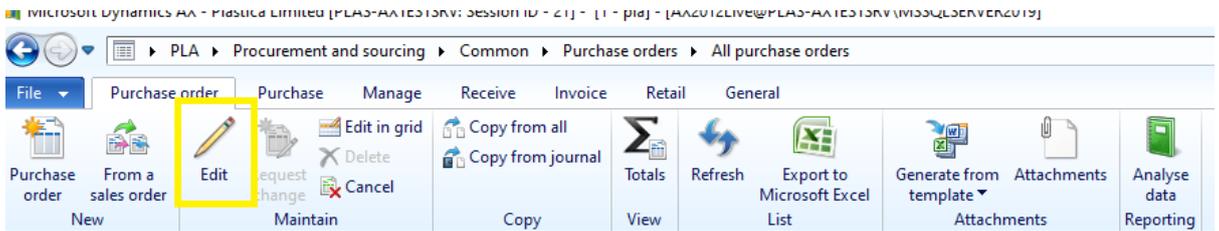


- If the item has a supplier generated batch number you must manually create the record in AX. Receiving via RF Smart will automatically do this for you.

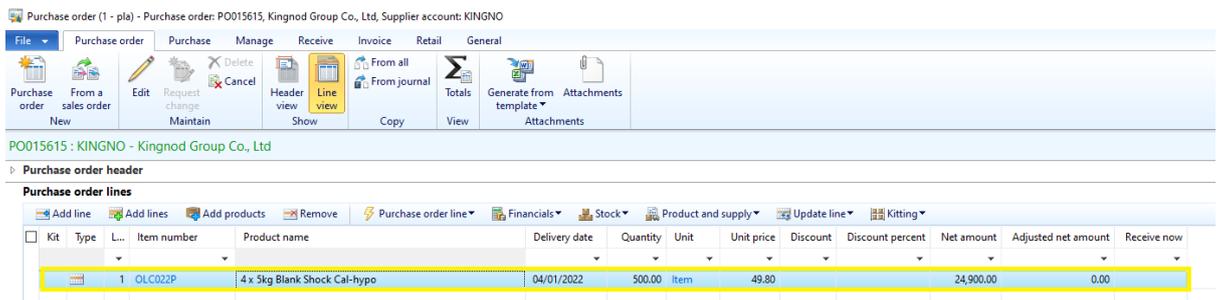
If the item does not have a supplier batch number and AX is using the purchase order number you can skip this step and go straight to step 12

If the item is serial number controlled you can only receipt one unit at a time, if you are receipting more than one unit of a serial controlled item it is quicker to receipt the order via RF Smart

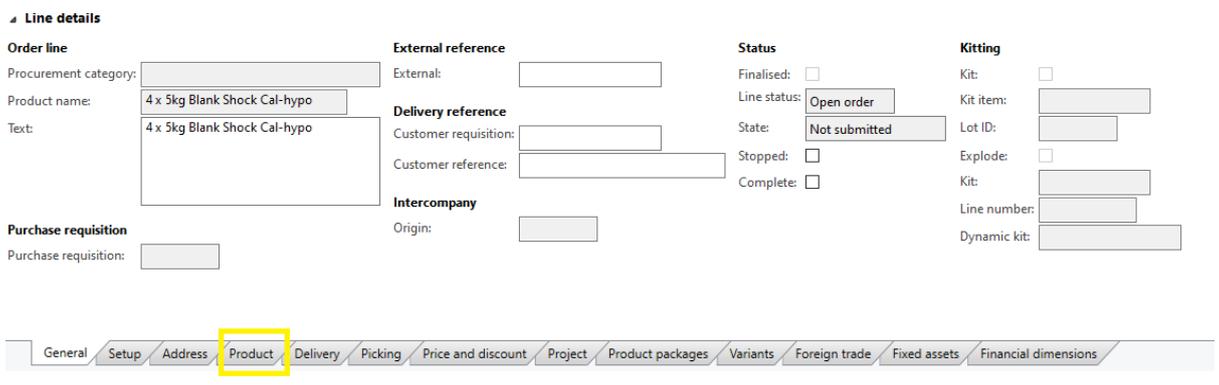
On the Navigation Ribbon Click on Edit



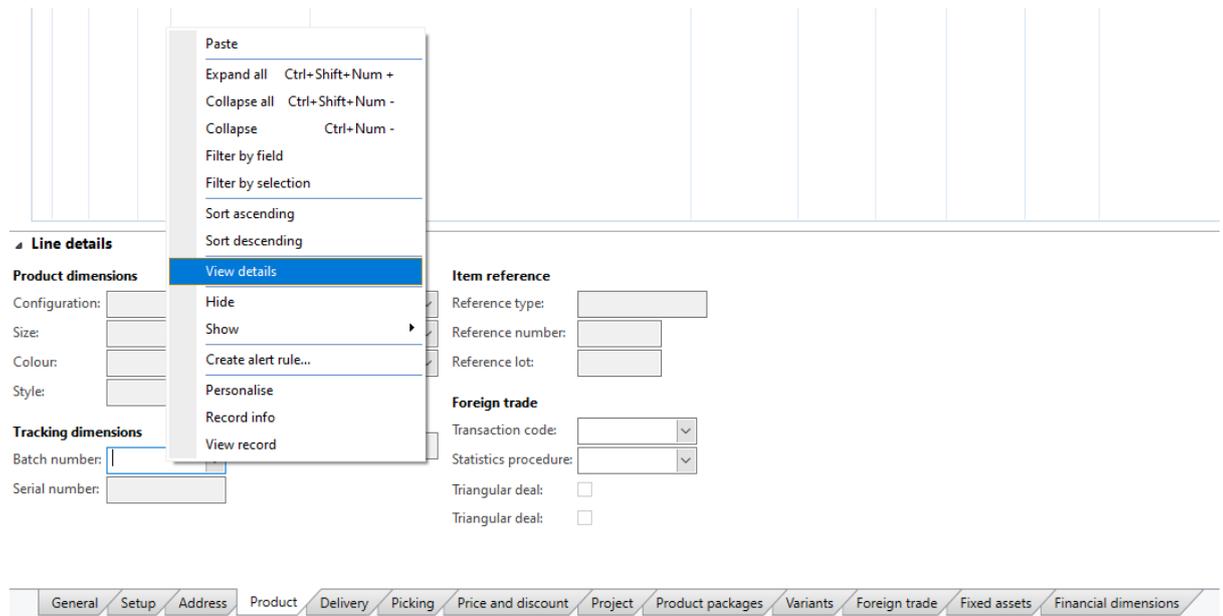
- Click on the line where you need to create the item batch number



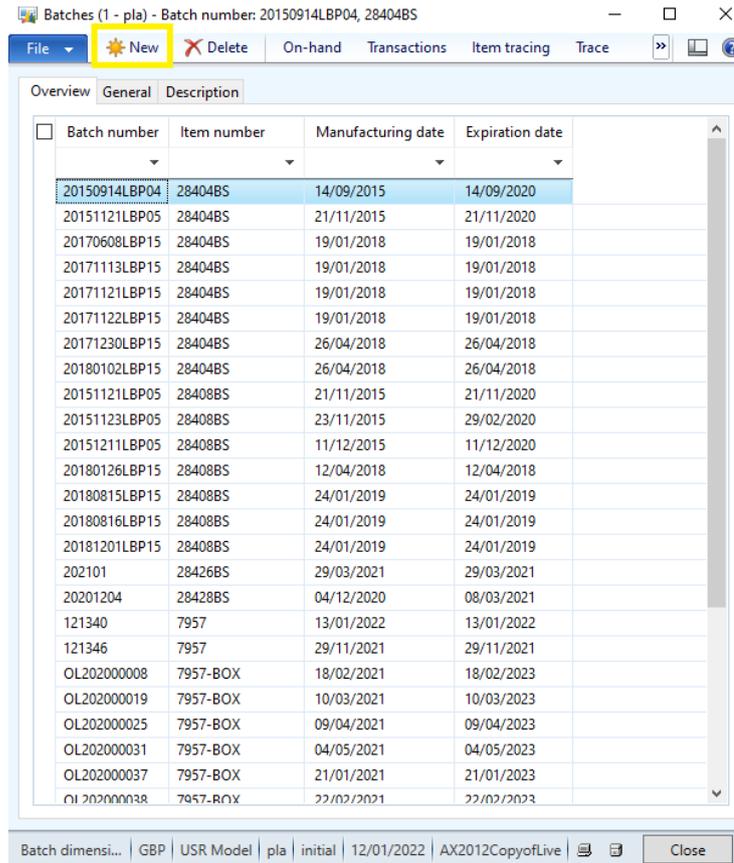
- Now at the bottom of the window under Line details click on the Product tab



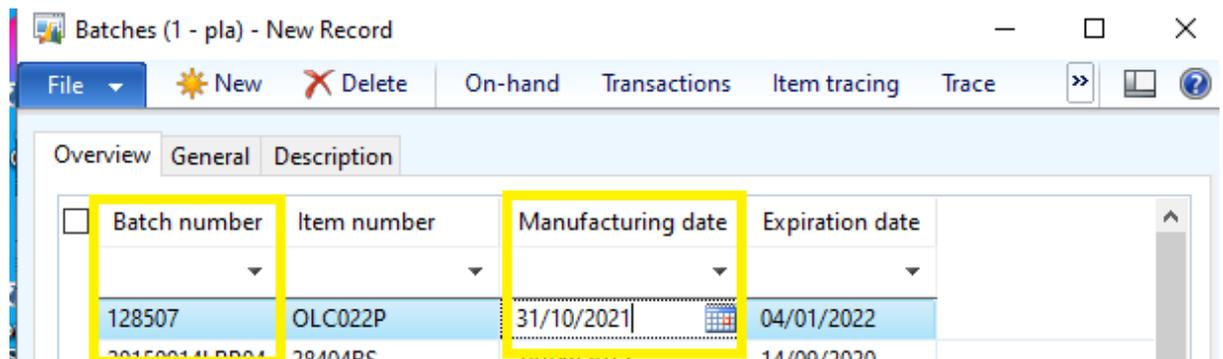
6. Right mouse click on the Batch number or Serial number field and then select View details



7. Click New



8. Enter the batch/serial number that is printed on the item and enter the manufactured date. Then Close the window



9. Click back on the Batch/serial number field and select your newly created batch/serial number from the list. Press Ctrl+S

Repeat steps 4-9 for every line on the purchase order that needs a batch number to be created.

| Batch numbers | | | On-hand | Reference |
|---------------|--------------------|-----------------|---------|-----------|
| Batch number | Manufacturing date | Expiration date | | |
| 128507 | 31/10/2021 | 04/01/2022 | | |
| PO011008 | 20/07/2020 | 20/07/2025 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Line details
Product dimensions
 Configuration:
 Size:
 Colour:
 Style:

Tracking dimensions
 Batch number: Statistics procedure:
 Serial number: Triangular deal:
 Triangular deal:

General Setup Address Product **Delivery** Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions

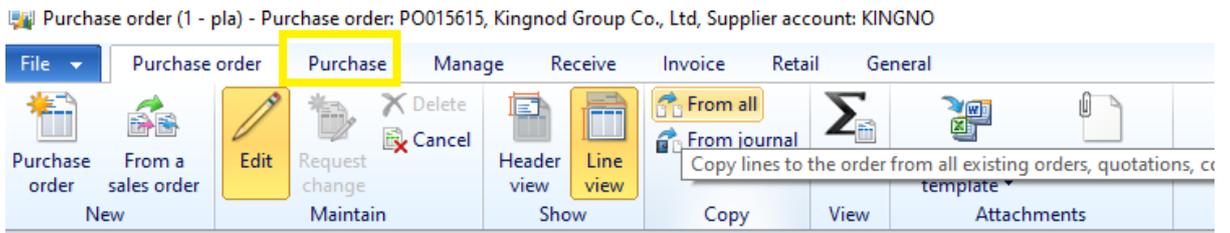
10. Under Line details Product tab the warehouse and location where the goods are to be receipted to will be displayed. Change if the displayed warehouse and/or location is different

Repeat this step for every item on the purchase order that needs to be updated with a different warehouse or location

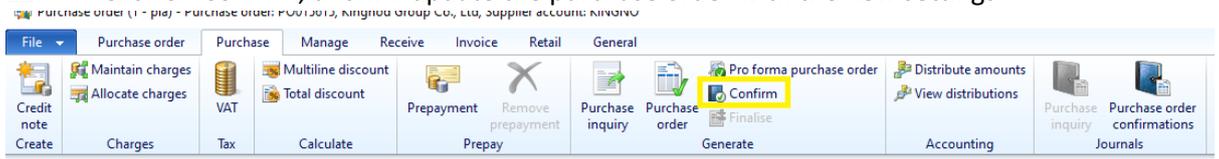
| | | |
|---|--|--|
| Product dimensions Configuration: <input type="text"/> Size: <input type="text"/> Colour: <input type="text"/> Style: <input type="text"/> | Storage dimensions Site: <input type="text" value="PLAHAST"/> Warehouse: <input type="text" value="45"/> Location: <input type="text" value="GOODSIN"/> Planned-order reference Number: <input type="text"/> Master plan: <input type="text"/> | Item reference Reference type: <input type="text"/> Reference number: <input type="text"/> Reference lot: <input type="text"/> Foreign trade Transaction code: <input type="text"/> Statistics procedure: <input type="text"/> Triangular deal: <input type="checkbox"/> Triangular deal: <input type="checkbox"/> |
| Tracking dimensions Batch number: <input type="text" value="128507"/> Serial number: <input type="text"/> | | |

General Setup Address Product **Delivery** Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions

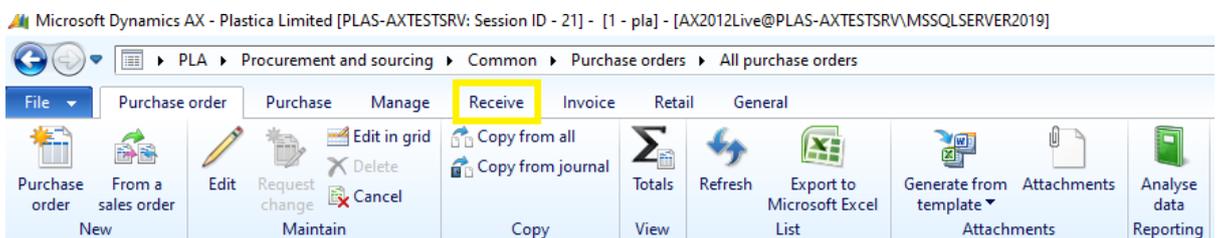
11. On the Navigation Ribbon click on the Purchase tab



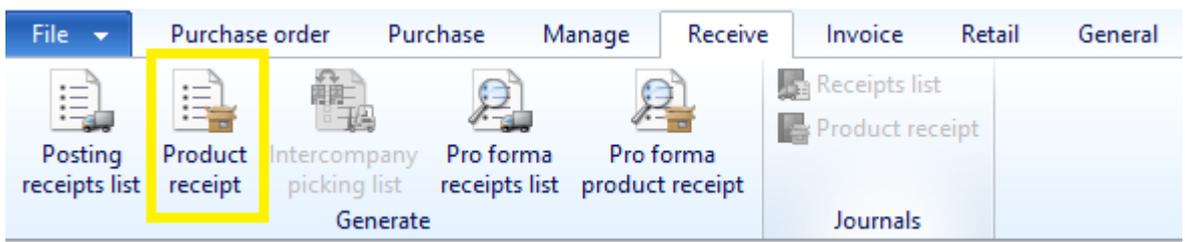
12. Click on Confirm, this will update the purchase order with the new settings



13. On the Navigation Ribbon click on Receive tab

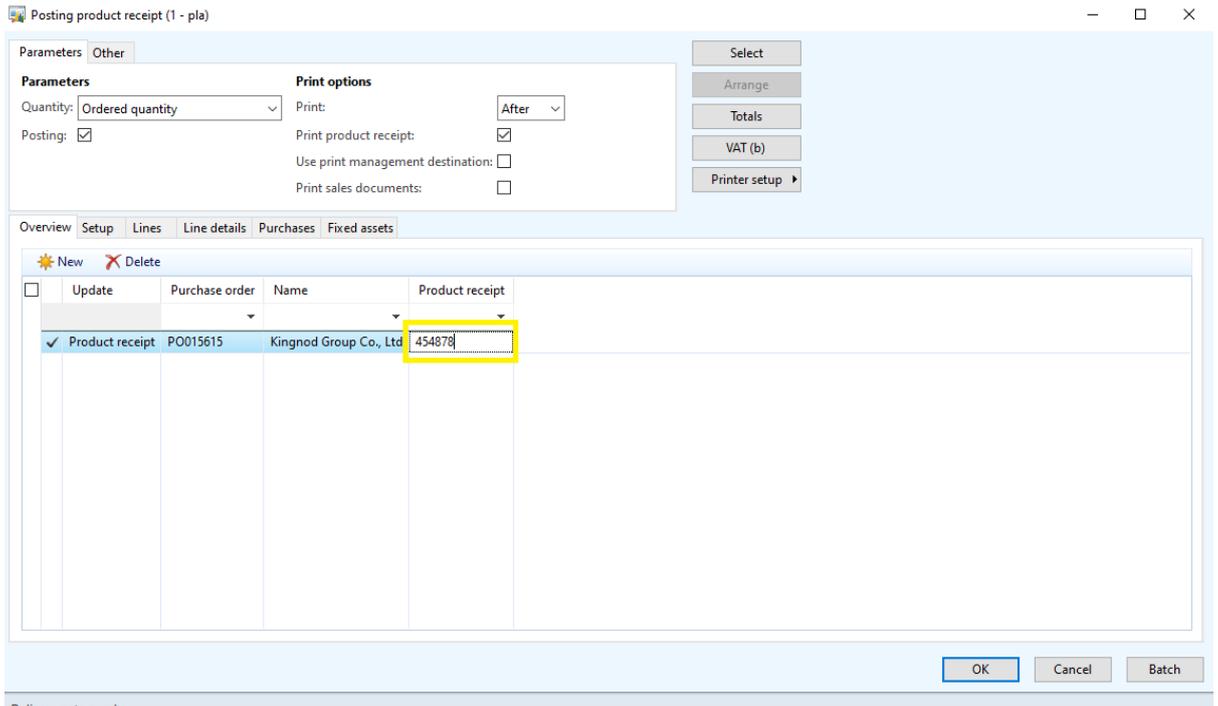


14. Click on Product receipt

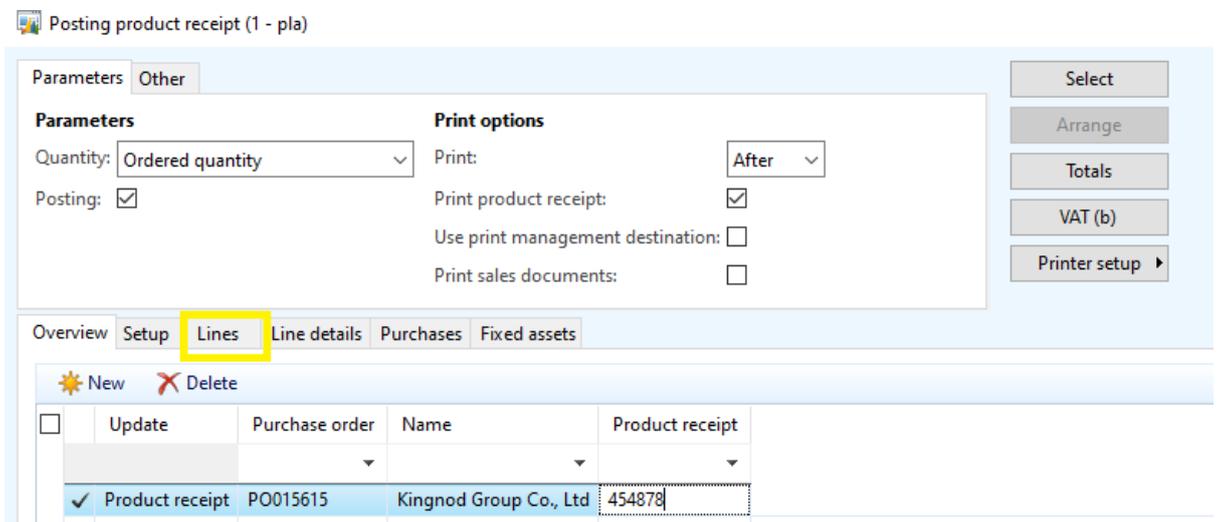


15. Enter in the suppliers delivery note number, if one isn't provided enter your initials followed by today's date

Note:- this field must be unique, so if you have multiple deliveries on different purchase orders for the same supplier append a suffix to your initials and date.



16. Click on Lines



17. Select enter lines that are not being delivered at this time and click Delete. The quantity field will display the outstanding amount for the purchase order line, adjust as necessary.

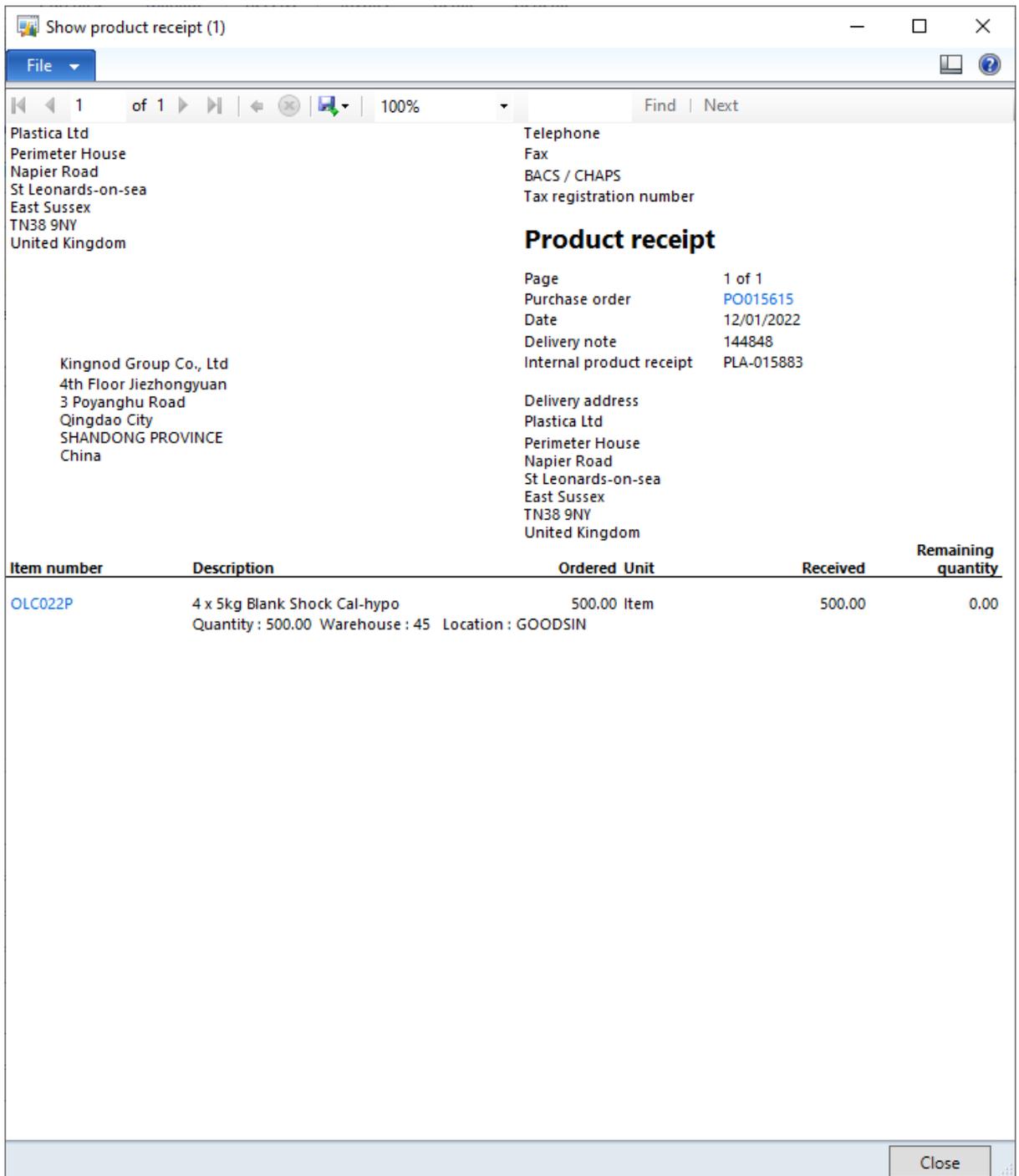
If the remaining balance will not be delivered click Close for receipt to cancel remaining balance.

Then Click OK to post the receipt

| Kit | Purchase order | Line number | Item number | Text | Warehouse | Batch number | Location | Quantity | Unit price | Line net... | Close for r... | Backorder |
|-----|----------------|-------------|-------------|------------------------------|-----------|--------------|----------|----------|------------|-------------|--------------------------|-----------|
| | PO015615 | 1 | OLC022P | 4 x 5kg Blank Shock Cal-hypo | 45 | 128507 | GOODSIN | 500.00 | 49.80 | 24,900.00 | <input type="checkbox"/> | |

18. The product receipt will print to the screen

19. If you need to print a copy go to File > Print > Print



Show product receipt (1)

File

- New Ctrl+N
- Open Ctrl+O
- Save Ctrl+S
- Delete Record Alt+F9
- Edit
- Print**
 - Print... Ctrl+P
 - Print Preview
 - Page setup
 - Printer setup...
- Export to Microsoft Excel Ctrl+T
- Send...
- ✓ Edit Record Ctrl+Shift+E
- Refresh F5
- View
- Tools
- Command
- Close Alt+F4

100% Find | Next

Telephone
Fax
BACS / CHAPS
Tax registration number

Product receipt

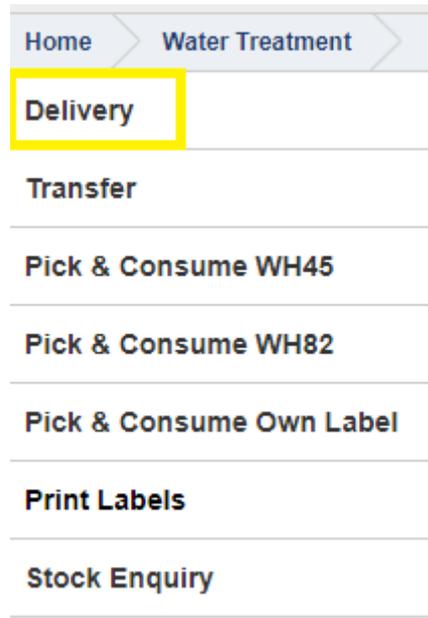
1 of 1
Purchase order PO015615
12/01/2022
Delivery note 144848
Final product receipt PLA-015883

Delivery address
Plastica Ltd
Perimeter House
Napier Road
St Leonards-on-sea
East Sussex
TN38 9NY
United Kingdom

| Item number | Description | Ordered Unit | Received | Remaining quantity |
|-------------|---|--------------|----------|--------------------|
| OLC022P | 4 x 5kg Blank Shock Cal-hypo Quantity : 500.00 Warehouse : 45 Location : GOODSIN | 500.00 Item | 500.00 | 0.00 |

Receiving a Purchase order via RF Smart Web Client

1. Select Delivery from the Water Treatment menu



Note:- the purchase order receipt workflows have been designed to minimise user input, if you have multiple items on a purchase order and you want to receipt them in do different warehouse you must repeat the following steps for each item on the purchase order

2. Select the warehouse workflow you are receipting the purchase order in to



3. Enter the purchase order number and press Enter



4. Press List

Note:- it is important that List button is pressed and you do not manually enter in the item number otherwise the batch/serial number will not be created

Purchase order

PO015616

Item

List Review Post

Scan item or F2 to list

F4 to go back, F3 to exit

5. A List of all open purchase order lines will be displayed, click on the line you want to receipt

| Item number | Product name | Quantity | UOM |
|-------------|------------------------------|----------|------|
| RCH022P | 4 x 5kg Relax Shock Cal-hypo | 500 | Item |

6. Enter the batch/serial number, then press Enter

Purchase order

PO015616

Item number

RCH022P

4 x 5kg Relax Shock Cal-hypo

Batch number

548785

List Review Generate Post Finished

7. Enter the Manufacturing date as indicated by the supplier, then press Enter

Purchase order

PO015616

Item number

RCH022P

4 x 5kg Relax Shock Cal-hypo

Manufacturing date

11/12/21|

8. Enter the quantity to be receipted into location, then press Enter

Note:- if you are splitting the delivery in to multiple locations of warehouses it may be easier to receipt the total quantity in to warehouse 45 location GoodsIn then transfer the item to its final locations

Purchase order

PO015616

Item number

RCH022P

4 x 5kg Relax Shock Cal-hypo

Remaining quantity

500

Item

Quantity

500

Finished

9. If you need to print product labels enter the quantity here, then press Enter. If no labels are required enter 0 then press Enter

Purchase order
PO015616

Item number
RCH022P
4 x 5kg Relax Shock Cal-hypo

Quantity
500
Item

Quantity of labels

10. Enter the location they are being received to and press Enter

Purchase order
PO015616

Item number
RCH022P
4 x 5kg Relax Shock Cal-hypo

Quantity
500
Item

Location

11. If it is the only item on the purchase order or no outstanding receipts are due, then a success message will appear

Purchase order

Inquiry

Success

Press F1 or scan PO

Press F4 to exit

If you are returned to the screen as shown below, press Post to post the product receipt

Note:- if you also have the option of a Finished button this will allow you to exit the purchase order with the item line at status Registered. At this point goods are not available in AX to be used you can return to the purchase order later and then click the Post button to complete the product receipt

Purchase order

PO015616

Item

List

Review

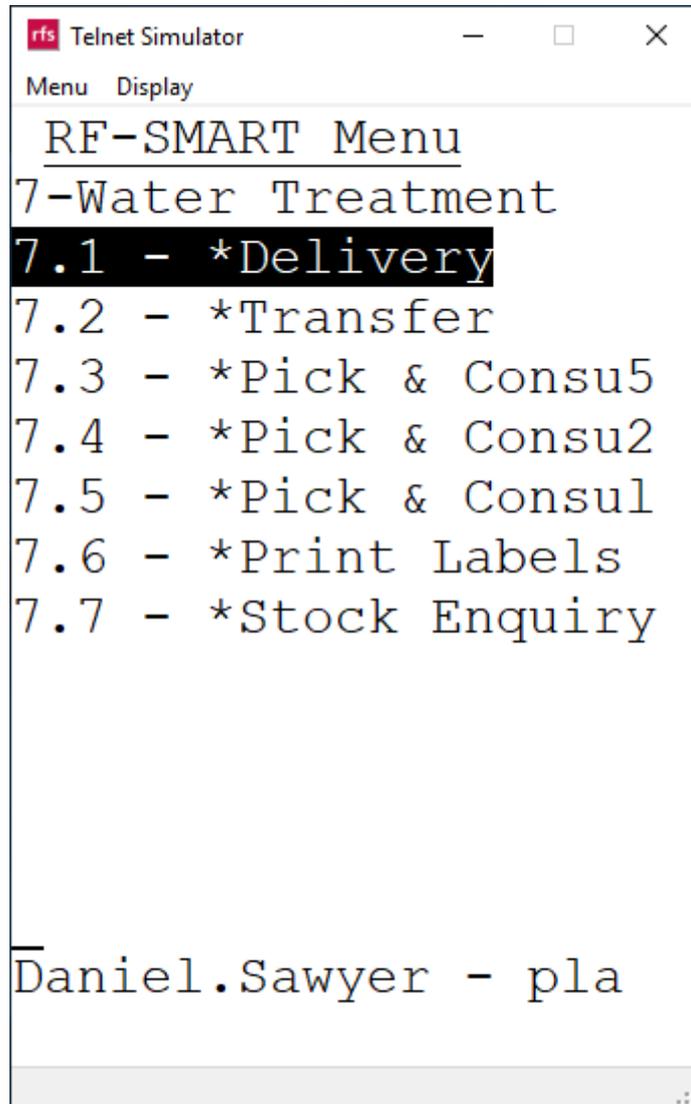
Post

Scan item or F2 to list

F4 to go back, F3 to exit

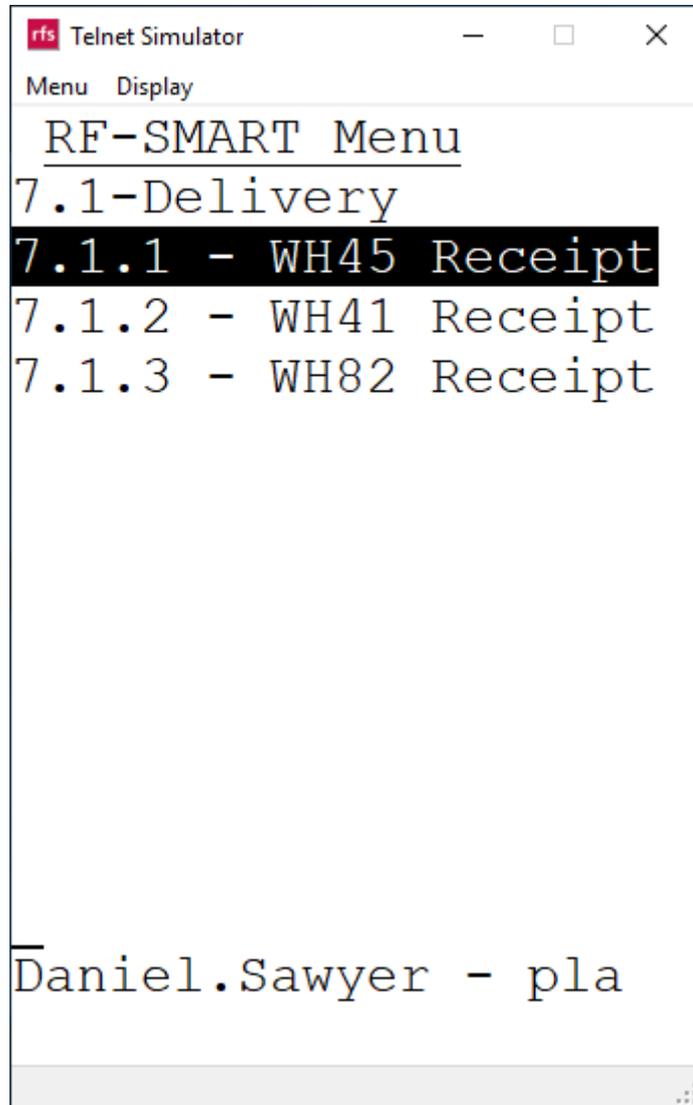
Receipting a Purchase order via RF Smart hand held device (Gun)

1. On the Water Treatment menu select Delivery



Note:- the purchase order receipt workflows have been designed to minimise user input, if you have multiple items on a purchase order and you want to receipt them in do different warehouse you must repeat the following steps for each item on the purchase order

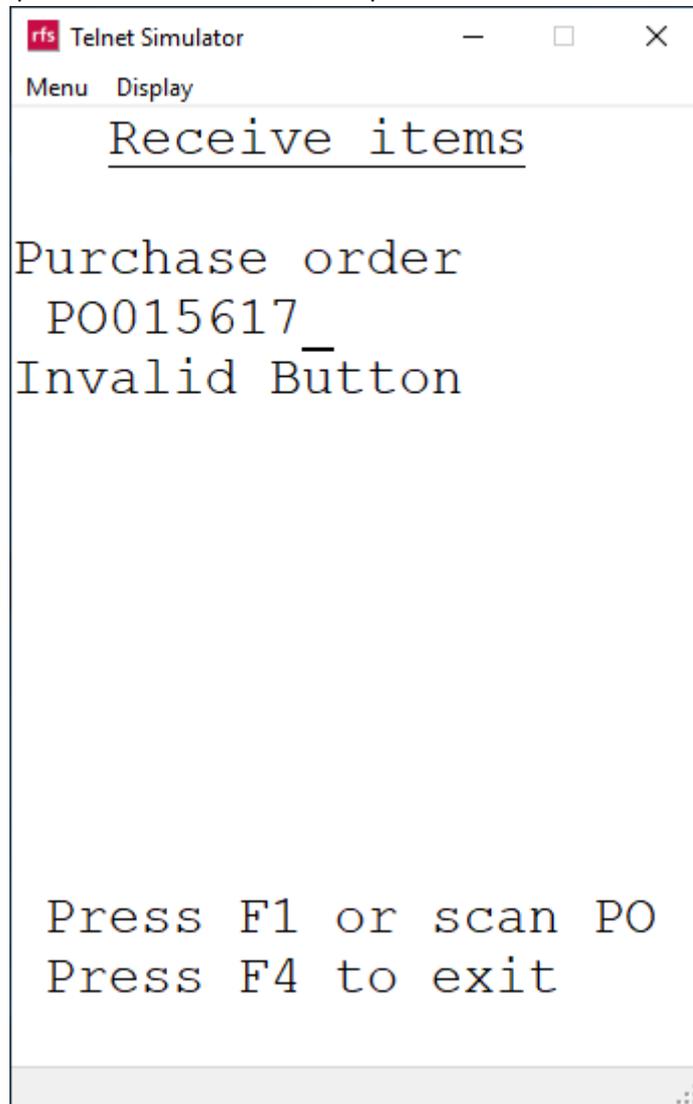
2. Select the warehouse workflow you are receipting the purchase order in to, then press Enter



```
rfb Telnet Simulator
Menu Display
RF-SMART Menu
7.1-Delivery
7.1.1 - WH45 Receipt
7.1.2 - WH41 Receipt
7.1.3 - WH82 Receipt

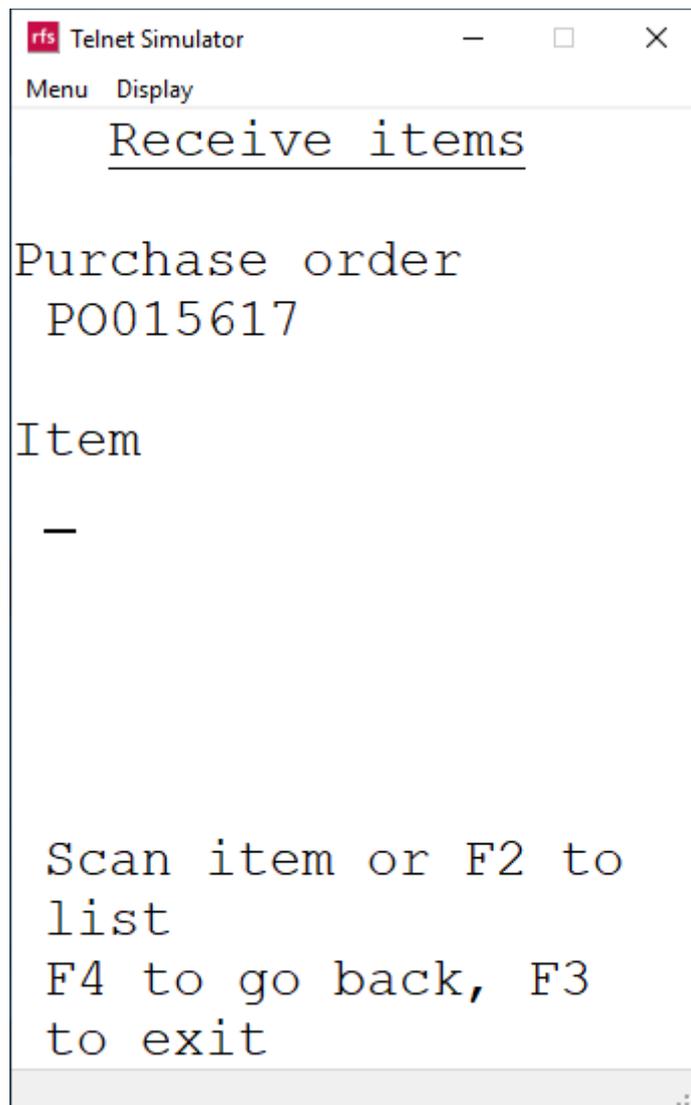
Daniel.Sawyer - pla
```

3. Enter the purchase order number then press Enter

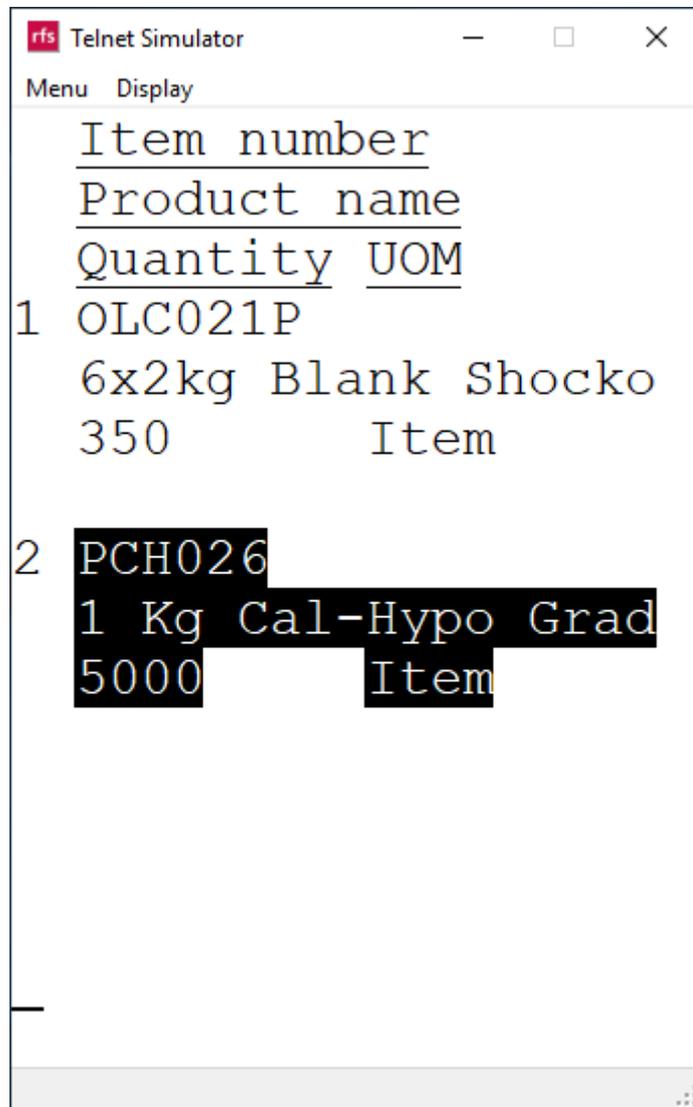


4. Press F2 to list the open lines on the purchase order

Note:- it is important that List button is pressed and you do not manually enter in the item number otherwise the batch number will not be created



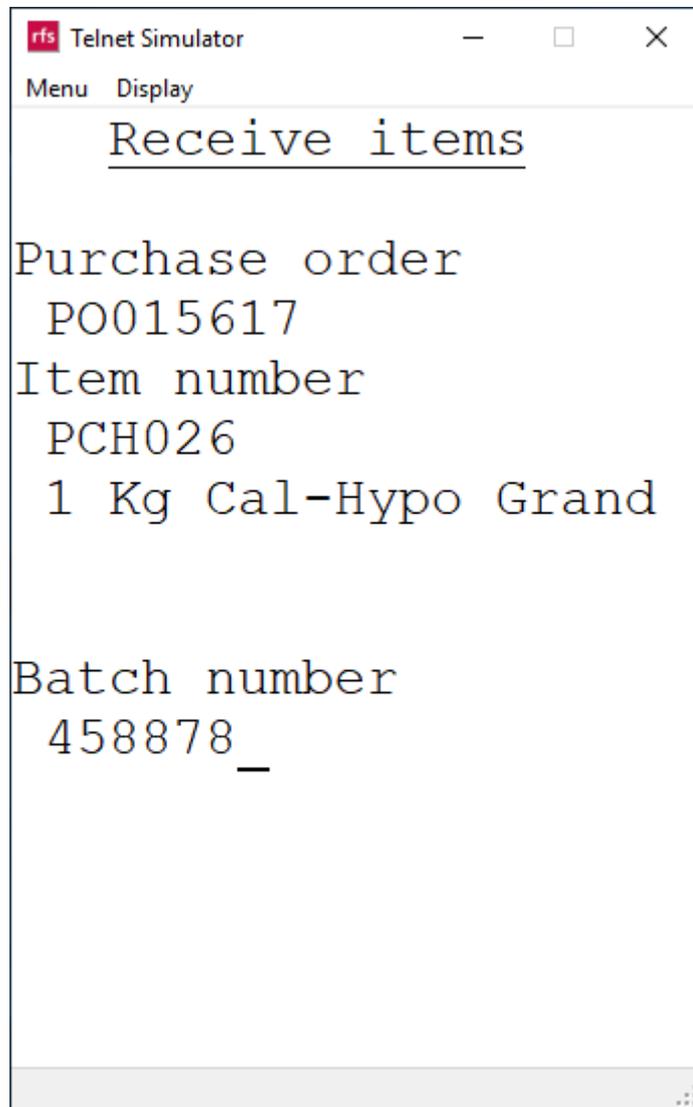
5. Select the line you want to receipt and then press Enter



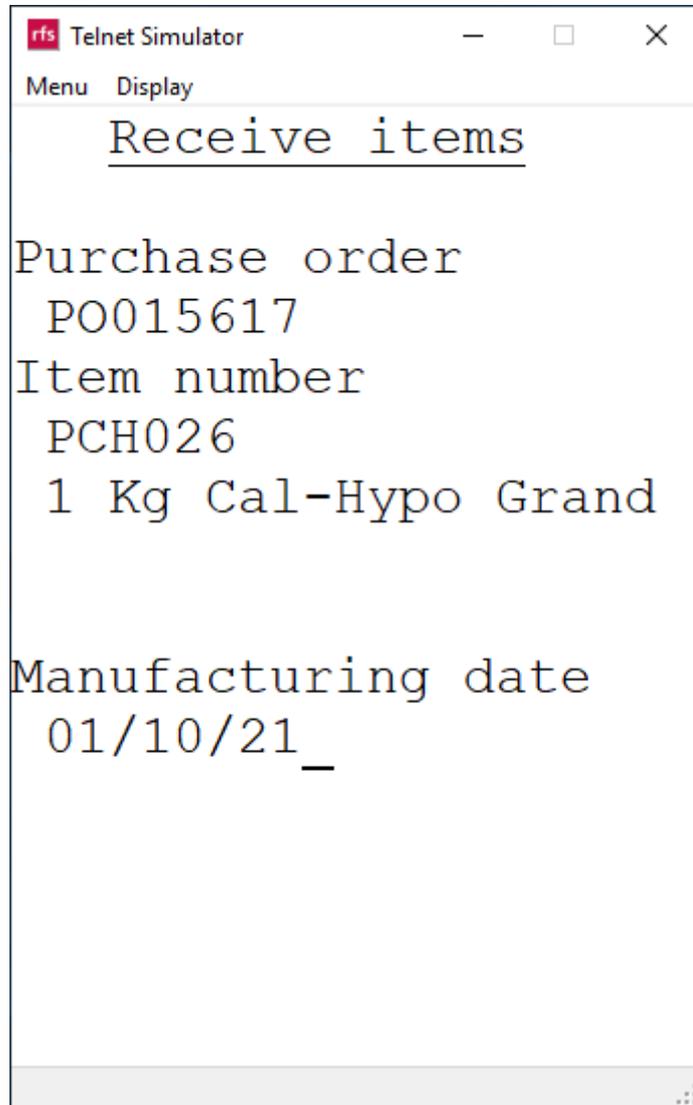
```
rfs Telnet Simulator
Menu  Display
-----
Item number
Product name
Quantity UOM
1 OLC021P
  6x2kg Blank Shocko
  350          Item

2 PCH026
  1 Kg Cal-Hypo Grad
  5000          Item
```

6. Enter the batch number, then press Enter



7. Enter the Manufacturing date as indicated by the supplier



```

rfs Telnet Simulator
Menu Display
Receive items

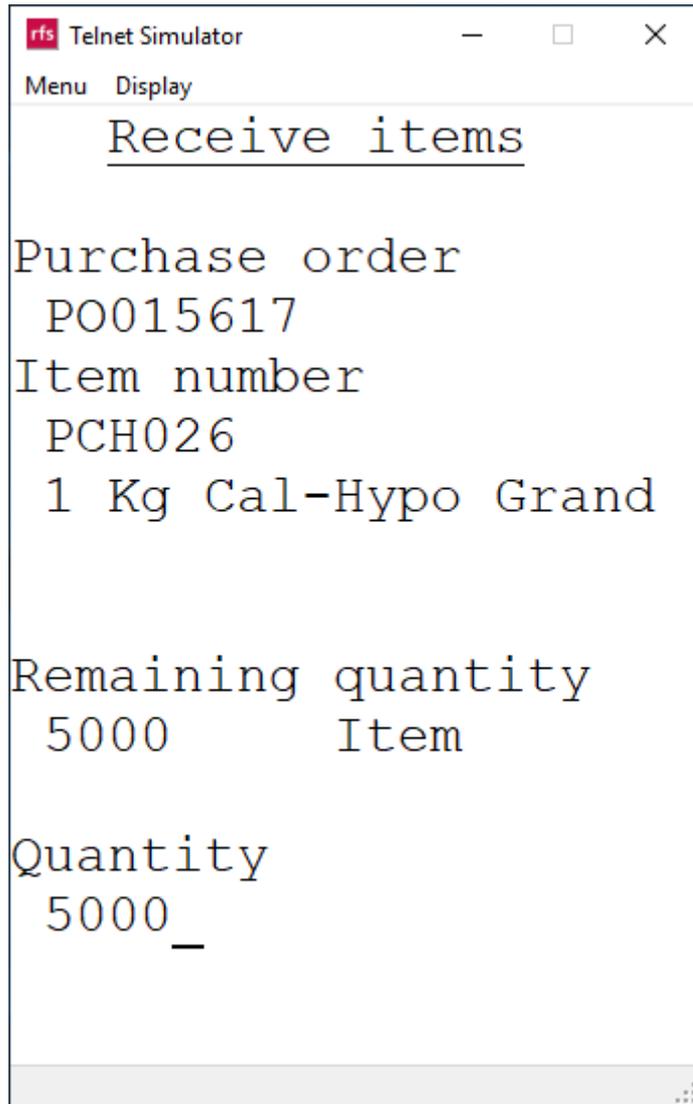
Purchase order
P0015617
Item number
PCH026
1 Kg Cal-Hypo Grand

Manufacturing date
01/10/21_

```

8. Enter the quantity to be received into the location, then press Enter

Note:- if you are splitting the delivery in to multiple locations of warehouses it may be easier to receipt the total quantity in to warehouse 45 location GoodsIn then transfer the item to its final locations



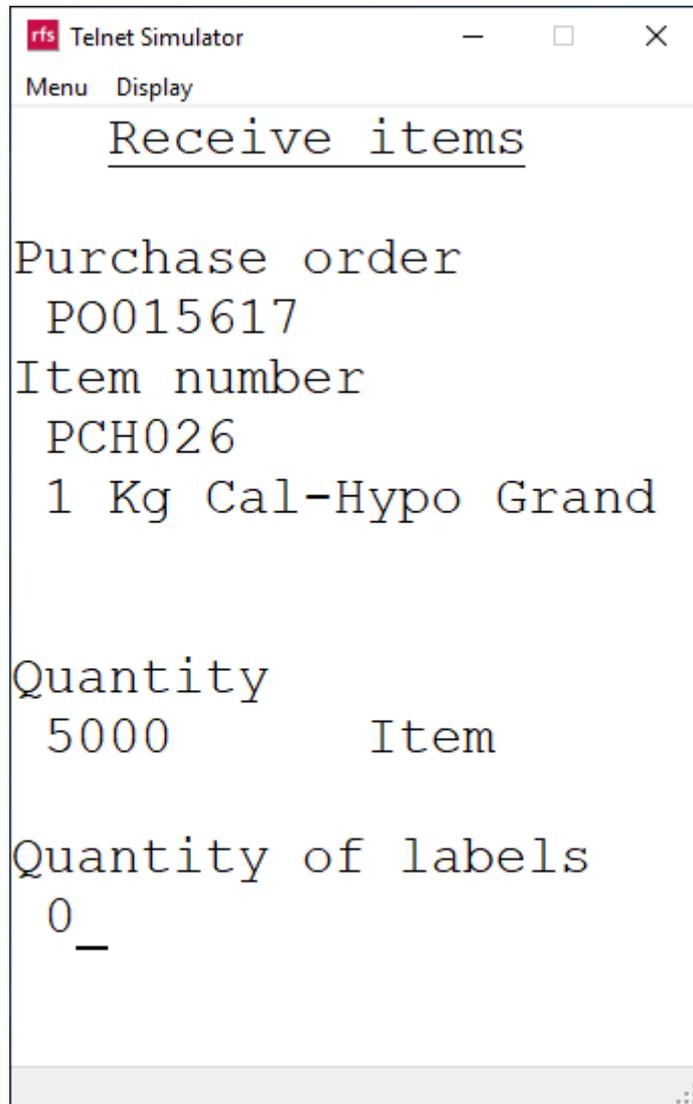
```
rfs Telnet Simulator
Menu Display
Receive items

Purchase order
PO015617
Item number
PCH026
1 Kg Cal-Hypo Grand

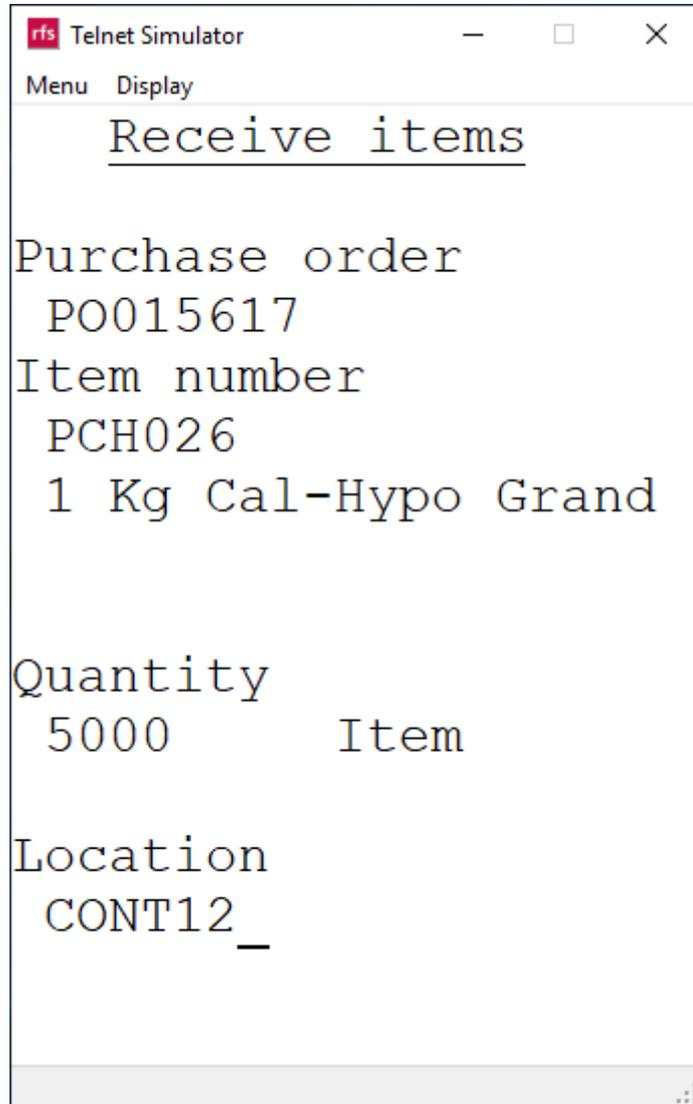
Remaining quantity
5000      Item

Quantity
5000_
```

9. If you need to print product labels enter the quantity here, then press Enter. If no labels are required enter 0 then press Enter



10. Scan the location the goods are being received in to



```
rfb Telnet Simulator
Menu Display
Receive items

Purchase order
P0015617
Item number
PCH026
1 Kg Cal-Hypo Grand

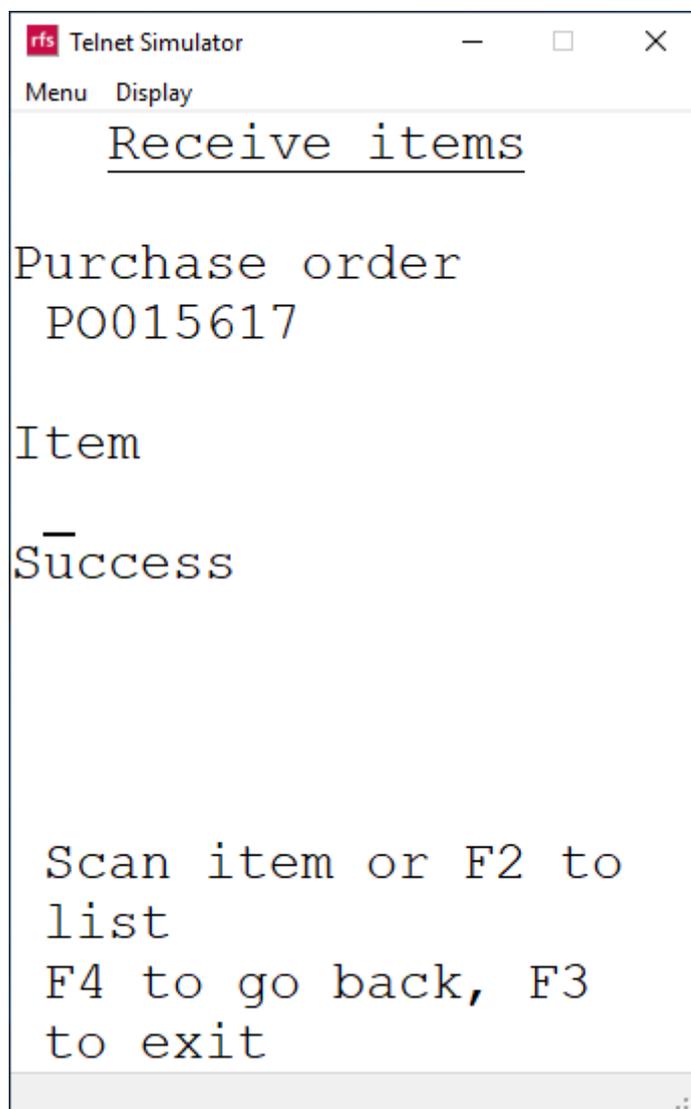
Quantity
5000      Item

Location
CONT12_
```

11. You will be returned to the item selection screen if there are lines with an outstanding quantity. Press F3 to post the receipt journal and exit the workflow.

If you have other items on the same purchase order to receive in to the same warehouse repeat steps 4 to 10

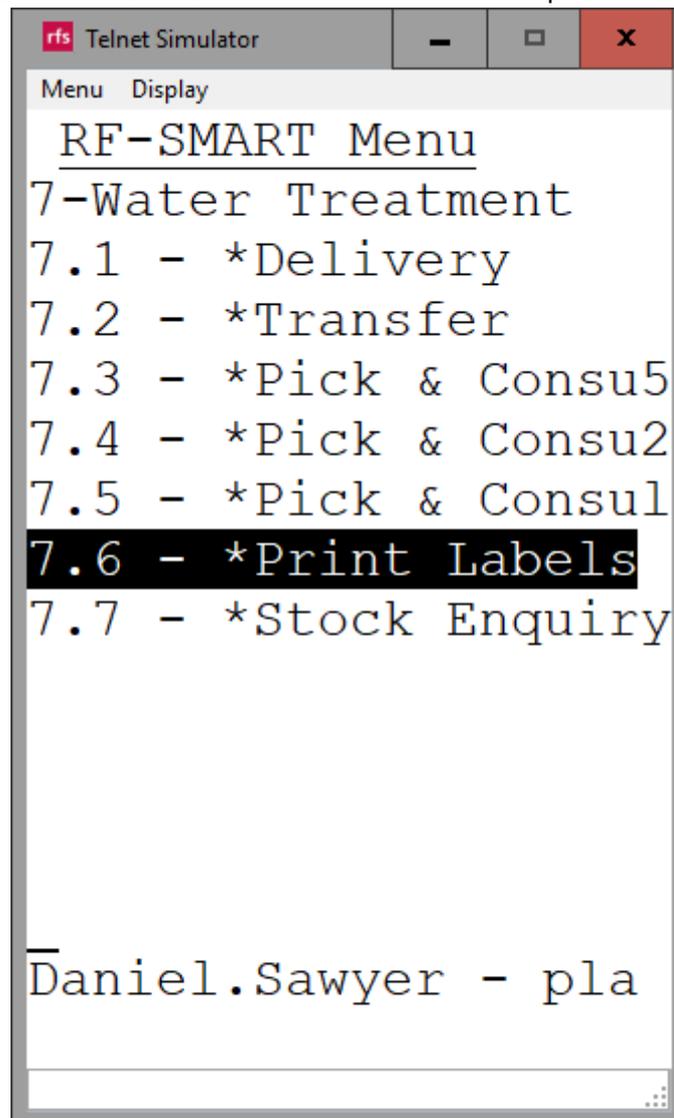
Note:- you can also press F4, this will allow you to exit the purchase order with the item line at status Registered. At this point goods are not available in AX to be used you can return to the purchase order later and press F3 to complete the product receipt



Labelling the goods with an item and batch barcode

All goods that are not delivered already labelled with item and batch barcode will need to be labelled so they can be identified and to allow transfers to be carried out via the handheld devices.

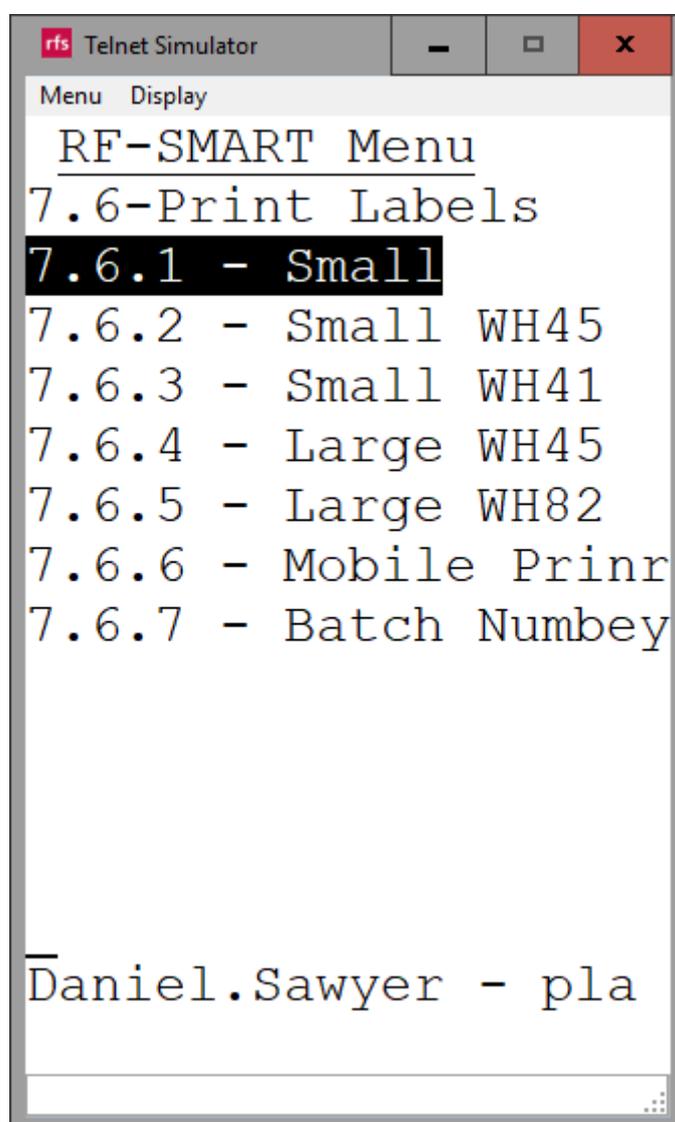
1. Under the Water Treatment menu select Print Labels option



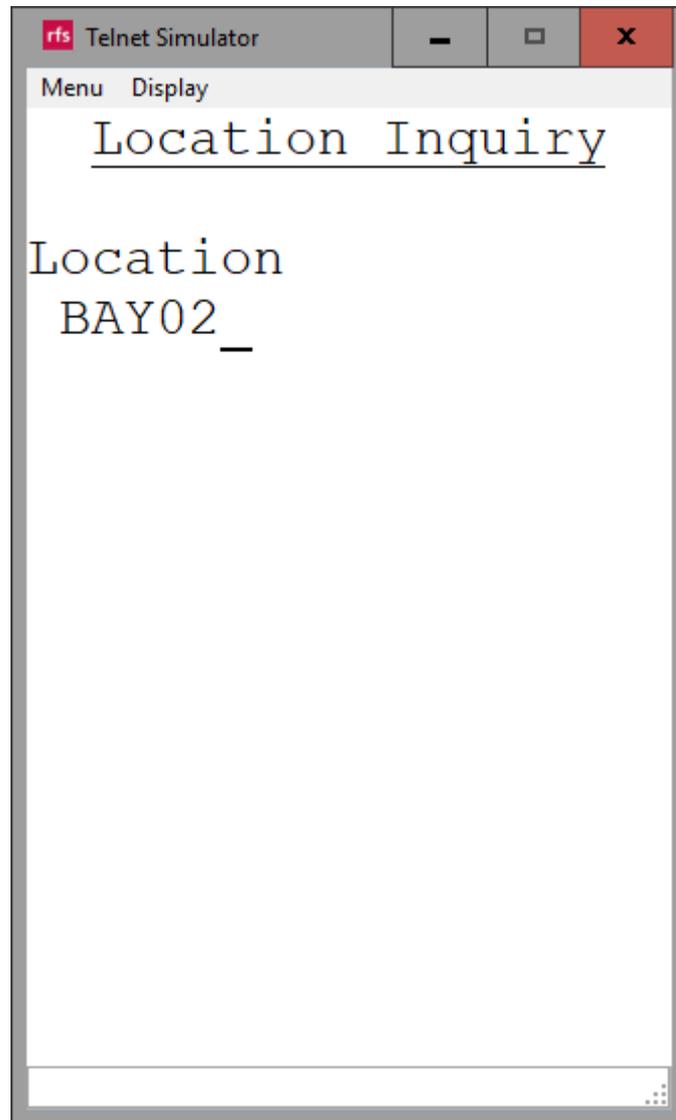
2. Label printing is done via a stock enquiry workflow, so we have set up predefined options to simplify the process

- a. Small Labels – stock in any warehouse
- b. Small Labels – stock in warehouse 40
- c. Small Labels – stock in warehouse 41
- d. Large Labels – stock in warehouse 45
- e. Large Labels – stock in warehouse 82
- f. Mobile Printing – stock in warehouse 45 prints to wifi printer
- g. Batch Label – stock in any warehouse, only batch barcode on label no item barcode

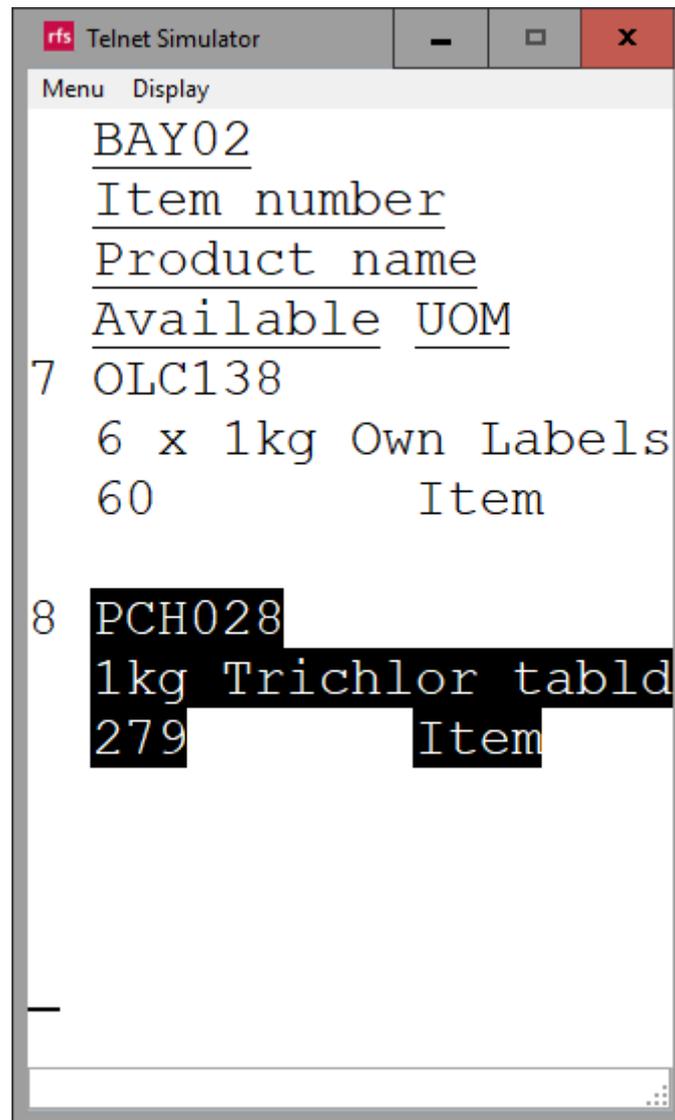
Select the option you require then press Enter



3. Scan or key location the goods have been receipted in to



4. Scroll down to the item you require labels for then press Enter



5. Enter number of labels required then press Enter

Your labels will then print out to the designated label printer

