How to Receipt a delivery

Receipting a purchase order in AX

| | ent and sourcing + Area page | [49] |
|---------------------------------------|--|--|
| Favourites | Common | ^ Journals |
| My Favourites | Burchase and an | |
| | All purchase orders | Price/discount agreement journals |
| Procurement and sourcing | Purchase orders not sent | Deve de |
| Area page | Purchase orders without confirmed delivery date | Reports |
| Common | Purchase orders of type journal | Suppliers |
| Purchase orders | Planned purchase orders | Suppliers |
| All purchase orders | Planned purchase orders with order date today or overdue | Supplier base data |
| Purchase orders not sent | | Supplier phone list |
| Purchase orders without conf | Delayed purchase orders | ▲ Supplier requests |
| Purchase orders of type journ | Purchase agreements | Supplier requests |
| Planned purchase orders | Backorder purchase lines | Rejected supplier requests |
| Planned purchase orders with | Delayed receipts | ▲ Categories |
| Delayed purchase orders | Rejected confirmation of product receipts | Categories |
| Purchase agreements | Not submitted purchase orders | |
| Backorder purchase lines | Pending purchase orders | Suppliers by category |
| Delayed receipts | Item Arrival | Commodity codes by category |
| Rejected confirmation of pro. | Purchase requisitions | ⊿ Status |
| Not submitted purchase orde | All purchase requisitions | Accrued purchases |
| Pending purchase orders | Purchase requisitions prepared by me | Purchase agreement fulfillment |
| Item Arrival | Purchase requisitions requested for me | Open purchase order lines with unconfirmed delivery date |
| Purchase requisitions | Purchase requisitions for my direct reports | Statistics |
| Requests for quotations | Purchase requisitions for all my reports | Supplier |
| Suppliers | Purchase requisitions assigned to me | Top suppliers by YTD purchases |
| Supplier requests | Purchase requisitions assigned to my queues | Supplier/Item statistics |
| | Purchase requisitions not recorded | Item/Supplier statistics |
| Catalogues | Release approved purchase requisitions | Purchases in the past periods |
| Journals | Consolidation opportunities | Top 100 suppliers |
| Inquiries | Requests for quotations | Request for quotation |
| Reports Y | All requests for quotations | Purchase requisition statistics |
| Home | Open requests for quotations | Purchase analysis |
| | Sent requests for quotations | Purchase by supplier and legal entity |
| Purchase ledger | | Purchase by vendors with diversity classification |
| Salas ladaas | Request for quotation replies | Purchase by country/region |
| Sales ledger | > Suppliers | Purchase optimisation |
| General ledger | Supplier requests | Purchase by procurement category and supplier diversity classification |
| | Catalogues | Purchase by procurement category and supplier invoice classification |
| Budgeting | | Purchase by procurement category and supplier involce classification |
| 1 | Inquiries | |
| Cost accounting | . Durahasa asalasa | Purchase by procurement category over consecutive years |
| Fixed assets | Purchase orders | Purchase by top suppliers and supplier invoice classification |
| - | Open purchase order lines | Purchase by requestor per ship to country/region |
| Cash and bank management | Backorder purchase lines details | Distribution |
| | Packing material transactions | Supply performance |
| Travel and expense | History | Supplier delivery performance on receipt |
| · | Suppliers | Supplier delivery performance on product receipt - early, on time, or late |
| 💗 🔊 🚰 😁 🖾 🦛 强 🎽 | a Journals | |

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

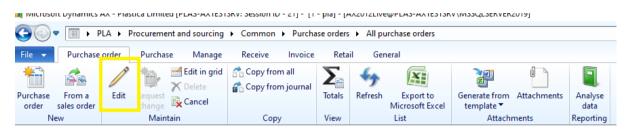
2. Enter the purchase order number you want to receipt, you can either enter this is the search bar or in the purchase order column filter. If you do not know the purchase order number you can search by supplier

|) 💬 🔻 🔳 🕨 PL | A Procurem | ent and sourcin | g Common Purcha | se orders All purchase orders | | | | | | |
|--------------------|---|-----------------|----------------------|--------------------------------|--------------------|----------------|-----------------|------------------|------------|-----------------------------|
| e 👻 Purchase o | order Purcha | ise Manage | Receive Invoice | Retail General | | | | | | |
| chase From a | Edit Request | Edit in grid | Copy from all | Totals Refresh Export to | Generate from Atta | chments Ana | | | | |
| rder sales order | | Cancel | | Microsoft Excel | | da | | | | |
| New | Mair | ntain | Сору | View List | Attachment | s Repo | ting | | | |
| Favourites | × ^ | 🔻 All purc | hase orders (Unsaved | filter) • | | | | | | PO015615 Purchase order 👻 🔿 |
| My Favourites | | | | | | | | | | |
| rocurement and sou | and the second se | Purchase | order Supplier accor | unt Name | Invoice account | Purchase type | Approval status | Mode of delivery | Status | |
| Area page | reing | | ✓ kingno | ¥ | • • | * | * | - | * | |
| Common | | FOULANT | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Received | |
| Purchase orders | | PO015572 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| All purchase or | lers | PO015612 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Purchase orders | not sent | PO015613 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Purchase orders | | PO015614 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Approved | | Cancelled | |
| Purchase orders | | PO015615 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Planned purcha | | PO015616 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Planned purcha | | PO015617 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Delayed purchas | | PO015677 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Purchase agreer | | PO015706 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |
| Backorder purch | hase lines | PO015753 | KINGNO | Kingnod Group Co., Ltd | KINGNO | Purchase order | Confirmed | | Open order | |

3. If the item has a supplier generated batch number you must manually create the record in AX. Receipting 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

On the Navigation Ribbon Click on Edit



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

| 🙀 Purch | Purchase order (1 - pla) - Purchase order: P0015615, Kingnod Group Co., Ltd, Supplier account: KINGNO | | | | | | | | | | | | | | | | | | | |
|-------------------|---|---------|---------|-----------------|-----------|----------|----------------|------------|----------|--------------|------------|--------|---------|------------|-------------|------------------|------------|---------------------|-------------|--|
| File 👻 | Purc | hase o | rder | Purchase Ma | nage F | eceive | Invoice Retai | il Gen | eral | | | | | | | | | | | |
| Purchase order | der sales order change view view template™ | | | | | | | | | | | | | | | | | | | |
| N | New Maintain Show Copy View Attachments | | | | | | | | | | | | | | | | | | | |
| | 0015615 : KINGNO - Kingnod Group Co., Ltd Purchase order header | | | | | | | | | | | | | | | | | | | |
| Purch | ase orde | er line | s | | | | | | | | | | | | | | | | | |
| <u> </u> | Add line | | Add lin | es 🛛 🧠 Add prod | cts 💌 | lemove | 🖗 Purchase ord | ler line 🔻 | 👬 Financ | ials 👻 🏭 S | tock 🕶 🛛 🛓 | Produc | t and s | supply 👻 🚦 | 🥶 Update li | ne 🔻 🔡 Kitting 🔻 | | | | |
| ы | it Type | L | ltem | number P | oduct nam | e | | | C | elivery date | Quanti | y Unit | | Unit price | Discount | Discount percent | Net amount | Adjusted net amount | Receive now | |
| | | - | | . | | | | | | - | | | - | * | * | * | * | ÷ | Ψ. | |
| | | 1 | OLCO | 22P 4 | 5kg Blank | Shock Ca | l-hypo | | 0 | 4/01/2022 | 500.0 | 0 ltem | | 49.80 | | | 24,900.00 | 0.00 | | |

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

| ▲ Line details | | | |
|---|--|-----------------------------------|-------------------------|
| Order line | External reference | Status | Kitting |
| Procurement category: | External: | Finalised: | Kit: |
| Product name: 4 x 5kg Blank Shock Cal-hypo | Delivery reference | Line status: Open order | Kit item: |
| Text: 4 x 5kg Blank Shock Cal-hypo | Customer requisition: | State: Not submitted | Lot ID: |
| | Customer reference: | Stopped: | Explode: |
| | | Complete: | Kit: |
| | Intercompany | | Line number: |
| Purchase requisition | Origin: | | Dynamic kit: |
| Purchase requisition: | | | |
| | | | |
| | | | |
| | | / / / | |
| General Setup Address Product Delivery Pick | king Price and discount Project Product packages | Variants Foreign trade Fixed asse | ts Financial dimensions |

| | Paste | |
|---------------------|-------------------------------|-----------------------|
| | Expand all Ctrl+Shift+Num + | |
| | Collapse all Ctrl+Shift+Num - | |
| | Collapse Ctrl+Num - | |
| | Filter by field | |
| | Filter by selection | |
| | Sort ascending | |
| ⊿ Line details | Sort descending | |
| Product dimensions | View details | Item reference |
| Configuration: | Hide | Reference type: |
| Size: | Show • | Reference number: |
| Colour: | Create alert rule | Reference lot: |
| Style: | Personalise | Foreign trade |
| Tracking dimensions | Record info | Transaction code: |
| Batch number: | View record | Statistics procedure: |
| · | | |
| Serial number: | | Triangular deal: |
| | | Triangular deal: |
| | | |

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

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

7. Click New

| le | × 1 | E New | 🗙 Delete | Un | -hand | Transactions | ltem tracing | Trace | » | |
|----|----------|---------|-------------|----|----------|--------------|-----------------|-------|---|---|
| ve | rview Ge | neral I | Description | | | | | | | |
| | Batch n | umber | ltem number | | Manufa | cturing date | Expiration date | | | ^ |
| | | * | | * | | - | - | | | |
| | 20150914 | 4LBP04 | 28404BS | | 14/09/20 | 15 | 14/09/2020 | | | |
| ĺ | 20151121 | ILBP05 | 28404BS | | 21/11/20 | 15 | 21/11/2020 | | | |
| | 20170608 | BLBP15 | 28404BS | | 19/01/20 | 18 | 19/01/2018 | | | |
| | 20171113 | SLBP15 | 28404BS | | 19/01/20 | 18 | 19/01/2018 | | | |
| | 2017112 | ILBP15 | 28404BS | | 19/01/20 | 18 | 19/01/2018 | | | |
| | 20171122 | LBP15 | 28404BS | | 19/01/20 | 18 | 19/01/2018 | | | |
| | 20171230 | LBP15 | 28404BS | | 26/04/20 | 18 | 26/04/2018 | | | |
| | 20180102 | LBP15 | 28404BS | | 26/04/20 | 18 | 26/04/2018 | | | |
| | 20151121 | LBP05 | 28408BS | | 21/11/20 | 15 | 21/11/2020 | | | |
| | 20151123 | SLBP05 | 28408BS | | 23/11/20 | 15 | 29/02/2020 | | | |
| | 20151211 | LBP05 | 28408BS | | 11/12/20 | 15 | 11/12/2020 | | | |
| | 20180126 | 5LBP15 | 28408BS | | 12/04/20 | 18 | 12/04/2018 | | | |
| | 20180815 | 5LBP15 | 28408BS | | 24/01/20 | 19 | 24/01/2019 | | | |
| | 20180816 | 5LBP15 | 28408BS | | 24/01/20 | 19 | 24/01/2019 | | | |
| | 20181201 | ILBP15 | 28408BS | | 24/01/20 | 19 | 24/01/2019 | | | |
| | 202101 | | 28426BS | | 29/03/20 | 21 | 29/03/2021 | | | |
| | 20201204 | 1 | 28428BS | | 04/12/20 | 20 | 08/03/2021 | | | |
| | 121340 | | 7957 | | 13/01/20 | 22 | 13/01/2022 | | | |
| | 121346 | | 7957 | | 29/11/20 | 21 | 29/11/2021 | | | |
| | OL20200 | 8000 | 7957-BOX | | 18/02/20 | 21 | 18/02/2023 | | | |
| | OL20200 | 0019 | 7957-BOX | | 10/03/20 | 21 | 10/03/2023 | | | |
| | OL20200 | 0025 | 7957-BOX | | 09/04/20 | 21 | 09/04/2023 | | | |
| | OL20200 | 0031 | 7957-BOX | | 04/05/20 | 21 | 04/05/2023 | | | |
| | OL20200 | 0037 | 7957-BOX | | 21/01/20 | 21 | 21/01/2023 | | | |
| | OI 20200 | 8500 | 7957-ROX | | 22/02/20 | 21 | 22/02/2023 | | | ~ |

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

| 🙀 Ва | atches (1 - pla) - N | lew Record | | | | _ | | × |
|------|----------------------|-------------|-----|--------------------|-----------------|-------|-----|---|
| File | 👻 🔆 New | 🗙 Delete | On- | hand Transactions | ltem tracing | Trace | » 🗉 | |
| Ove | erview General [| Description | | | | | | |
| | Batch number | ltem number | | Manufacturing date | Expiration date | | | ^ |
| , | • | | • | - | - | | | |
| | 128507 | OLC022P | | 31/10/2021 | 04/01/2022 | | | |
| | 2010001410004 | 28/0/85 | | | 1///00/2020 | | | |

9. Click back on the Batch number field and select your newly created batch 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 dimen | | | | | |
| Configuration: | | | | | |
| Size: | | | | | |
| Colour: | | | | | |
| Style: | | | | | |
| I | | | | | |
| Batch number: | | 1 | Statistic | s procedure: | |
| Ļ | ~ | | | | |
| Serial number: | | | Triangul | | |
| | | | Triangul | ar 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 | Storage dim | ensions | Item reference |
|---|--|--------------|---|
| Configuration: | Site: | PLAHAST ~ | Reference type: |
| Size: | Warehouse: | 45 🗸 | Reference number: |
| Colour: | Location: | GOODSIN 🗸 | Reference lot: |
| Style: Tracking dimensions Batch number: 128507 Serial number: | Planned-ord Number: Master plan: | er reterence | Foreign trade Transaction code: Statistics procedure: V Triangular deal: Triangular deal: |

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

🖼 Purchase order (1 - pla) - Purchase order: PO015615, Kingnod Group Co., Ltd, Supplier account: KINGNO

| File 👻 | Purchase | order | Purchase | Mana | ge Re | ceive | Invoice | Retail | Ger | neral | | |
|----------|-----------|-------|----------|----------------------|--------|-------|---------|--------|-----------|-----------------|--------------------|---------|
| | From a | Edit | Request | 🗙 Delete 🌺 Cancel | Header | Line | From al | urnal | E order f | rom all existin | g orders, quotatio | ons, co |
| order sa | les order | | change | | view | view | | | | template * | | |
| New | 1 | | Maintain | | Sho | w | Сору | | View | Attac | hments | |

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

| File 🚽 | Purchase order | Purcha | se Manage Re | ceive Invoi | ce Retail | General | | | | | |
|----------------|--|--------|---|-------------|----------------------|---------------------|-------------------|--------------------------|---------------------------------------|--------|--------------------------|
| Credit note | 👫 Maintain charges 🛒 Allocate charges | VAT | 😹 Multiline discount <u> T</u> otal discount | Prepayment | Remove prepayment | Purchase inquiry | Purchase order | Pro forma purchase order | Distribute amounts View distributions | | hase order firmations |
| Create | Charges | Tax | Calculate | Prep | ay | | | Generate | Accounting | Journa | ls |

13. On the Navigation Ribbon click on Receive tab

🚚 Microsoft Dynamics AX - Plastica Limited [PLAS-AXTESTSRV: Session ID - 21] - [1 - pla] - [AX2012Live@PLAS-AXTESTSRV\MSSQLSERVER2019]

| G 🖓 🔻 🔳 🕨 P | Common > Purchase orders > All purchase orders | | | | | | | | | | | | |
|--------------------------------------|--|---------------------|----------|---------|--------|-----------|------------------------------|------------------------------------|-------------|-----------------|--|--|--|
| File 👻 Purchase | order Purchase | Manage | Receive | Invoice | Retai | l Ger | ieral | | | | | | |
| 1 | | Edit in grid | Copy fro | | Σ | 43 | X | | | | | | |
| Purchase From a order sales order | Edit Request change | 🙀 Cancel | | | Totals | Refresh | Export to Microsoft Excel | Generate from template * | Attachments | Analyse data | | | |
| New | New Maintain | | Сору | | View | | List | Attachi | ments | Reporting | | | |

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.

| 🙀 Posting product receipt (1 - pla) | | | | - 🗆 X |
|---|-----------------------------------|--------------|---|-----------------|
| Parameters Other Parameters Quantity: Ordered quantity Posting: | Use print management destination: | After > Ø | Select Arrange Totals VAT (b) Printer setup | |
| | urchases Fixed assets | | | |
| · · · | Name Product recei | | | |
| | | | | OK Cancel Batch |

16. Click on Lines

| 7 | Posting | product | receipt | (1 - | · pla) | |
|---|---------|---------|---------|------|--------|--|
|---|---------|---------|---------|------|--------|--|

| Parameters Print options Quantity: Ordered quantity Print: After Posting: Image: Comparison of the print product receipt: Image: Comparison of the print product receipt: Image: Comparison of the print product receipt: Print product receipt: Image: Comparison of the print print product receipt: Image: Comparison of the print p | Arrange Totals VAT (b) Printer setup |
|--|---|
| Posting: Print product receipt: Use print management destination: Print sales documents: | VAT (b) |
| Use print management destination: Print sales documents: | |
| Print sales documents: | |
| | Printer setup 🕨 |
| | |
| Overview Setup Lines Line details Purchases Fixed assets | |
| Update Purchase order Name Product receipt | |
| · · · · · · · · · · · · · · · · · · · | |
| ✓ Product receipt PO015615 Kingnod Group Co., Ltd 454878 | |

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

| Posting | product receipt (| 1 - pla | a) | | | | | | | | | - | | × |
|-----------|-------------------|---------|------------------|------------------|------------------------------|-----------|--------------|------------|----------|------------|-----------|-------------|-----------|---|
| Paramete | rs Other | | | | | | Se | elect | | | | | | |
| Paramet | ers | | | Print options | | | Arr | ange | | | | | | |
| Quantity: | Ordered quantit | у | ~ | Print: | After 🗸 |] | Тс | otals | | | | | | |
| Posting: | \checkmark | | | Print product re | ceipt: 🗹 | | VA | T (b) | | | | | | |
| | | | | | gement destination: 🗌 | | | er setup 🕨 | | | | | | |
| | | | | Print sales docu | ments: | | Plint | er setup | | | | | | |
| Overview | Setup Lines | Line | e details Purch | ases Fixed asse | ts | | | | | | | | | |
| 🗙 De | lete 🛛 🖗 Purch | hase c | order line 🔻 🛛 🛔 | Stock 🔻 🛛 🧱 | Update line▼ | | | | | | | | | |
| 🗌 Kit | Purchase order | | Line number | ltem 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 | | | 4 |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | OK | Cancel | Batc | n |
| | | | | | | | | | | | | | | ÷ |

18. The product receipt will print to the screen

| | receipt (1) | | _ | | |
|---|---|---|--------------------|----------------|--|
| File 👻 | | | | | |
| 4 4 1 of | 1 🕨 🕅 🍬 🛞 🖳 - 🛛 100% | - Find ∣ I | Next | | |
| lastica Ltd erimeter House lapier Road t Leonards-on-sea | | Telephone Fax BACS / CHAPS Tax registration number | | | |
| ast Sussex N38 9NY nited Kingdom | | Product receip | t | | |
| | | Page | 1 of 1 | | |
| | | Purchase order | PO015615 | | |
| | | Date | 12/01/2022 | | |
| | | Delivery note | 144848 | | |
| Kingnod Gro 4th Floor Jie | | Internal product receipt | PLA-015883 | | |
| 3 Poyanghu | | Delivery address | | | |
| Qingdao Cit | | Plastica Ltd | | | |
| SHANDONG China | PROVINCE | Perimeter House Napier Road | | | |
| | | St Leonards-on-sea | | | |
| | | East Sussex | | | |
| | | TN38 9NY | | | |
| | | United Kingdom | | | |
| | | | | Remaining | |
| em number | Description | Ordered Unit | Received | | |
| em number DLC022P | Description 4 x 5kg Blank Shock Cal-hypo Quantity : 500.00 Warehouse : 45 Loca | 500.00 Item | Received 500.00 | quantit 0.0 | |
| | 4 x 5kg Blank Shock Cal-hypo | 500.00 Item | | quanti | |

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

| 7 | Show product recei | ipt (1) | | | | | _ | | × |
|------|--------------------|--|----------|-----------|-----------------------------------|----------------------|--------|----|---------|
| Fil | e 🔻 | | | | | | | | |
| | New | Ctrl+N | 100% | - | Find | Next | | | |
| | Open | Ctrl+O | | | Telephone | | | | |
| | Save | Ctrl+S | | | Fax BACS / CHAPS | | | | |
| | Delete Record | Alt+F9 | | | Tax registration number | | | | |
| | Edit | I | | | Product receip | ot | | | |
| | Print | l | Print | Ctrl+P | 2 | 1 of 1 | | | |
| | Export to Microso | ft Excel Ctrl+T | Print Pr | eview | hase order | PO015615 | | | |
| | Send | | Page se | tup | ery note | 12/01/2022 144848 | | | |
| ~ | Edit Record | Ctrl+Shift+E | Printer | setup | mal product receipt | PLA-015883 | | | |
| | Refresh | F5 | | | Delivery address | | | | |
| | View | | | | Plastica Ltd Perimeter House | | | | |
| | Tools | | | | Napier Road | | | | |
| | Command | | | | St Leonards-on-sea East Sussex | | | | |
| | Close | Alt+F4 | | | TN38 9NY United Kingdom | | | | |
| | | | | | - | _ | | | aining |
| tem | number | Description | | | Ordered Unit | Rec | ceived | qu | Jantity |
| OLCO | 022P | 4 x 5kg Blank Shoch Quantity : 500.00 V | | ocation : | 500.00 Item GOODSIN | 9 | 500.00 | | 0.00 |

Receipting a Purchase order via RF Smart Web Client

1. Select Delivery from the Water Treatment menu

| Home Water Treatment |
|-------------------------|
| Delivery |
| Transfer |
| Pick & Consume WH45 |
| Pick & Consume WH82 |
| Pick & Consume Own Labe |
| Print Labels |
| Stock Enquiry |
| |

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 mush repeat the following steps for each item on the purchase order

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

| Home Water Treatment Delivery | \geq |
|-------------------------------|--------|
| WH45 Receipt | |
| WH41 Receipt | |
| WH82 Receipt | |

3. Enter the purchase order number and press Enter

| Purchase order |
|---------------------|
| PO015616 |
| Inquiry |
| Press F1 or scan PO |
| Press F4 to exit |

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 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

| Back | | RF-SMART | | |
|-------------|----------------|------------------------------------|----------|------|
| Item number | | Product name | Quantity | UOM |
| RCH022P | | 4 x 5kg Relax Shock Cal-hypo | 500 | Item |
| 6. | Enter the hate | h number, then press Enter | | |
| 0. | | | | |
| | | 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 |
| 500 |

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

| PO015616 |
|--|
| Item number RCH022P 4 x 5kg Relax Shock Cal-hypo |
| Quantity 500 Item |
| Quantity of labels |

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

| Purchase order |
|------------------------------|
| PO015616 |
| Item number |
| RCH022P |
| 4 x 5kg Relax Shock Cal-hypo |
| Quantity |
| 500 |
| Item |
| Location |
| BAY8 |
| Quantity Empty |

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

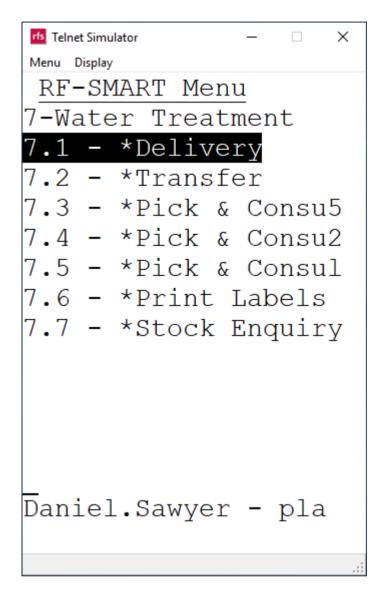
| Purchase order |
|------------------|
| PO015616 |
| Item |
| |
| List Review Post |
| |

Scan item or F2 to list

F4 to go back, F3 to exit

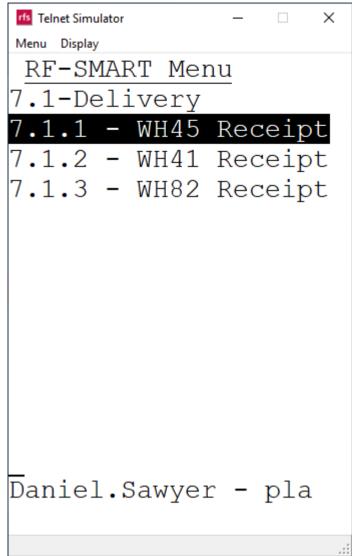
Receipting a Purchase order via RF Smart hand held device (Gun)

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 mush 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



3. Enter the purchase order number then press Enter

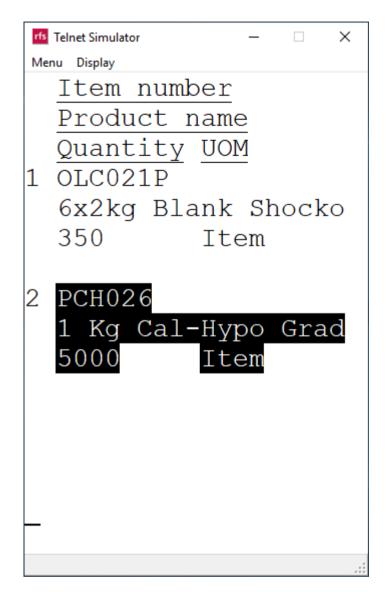
| rfs Telnet Simulat | or | | — | | \times |
|--------------------|------|------|------|-----|----------|
| Menu Display | | | | | |
| Rece | eive | e it | cems | | |
| | | | | | |
| Purchas | se d | orde | er | | |
| P0015 | | | | | |
| | _ | _ | | | |
| Invalio | l BI | | n | | |
| | | | | | |
| | | | | | |
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| | | | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Press | F1 | or | scai | n P | 0 |
| Press | F4 | to | exi | t | |
| | | | | | |
| | | | | | |

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

rfs Telnet Simulator Х _ Menu Display Receive items Purchase order PO015617 Item Scan item or F2 to list F4 to go back, F3 to exit

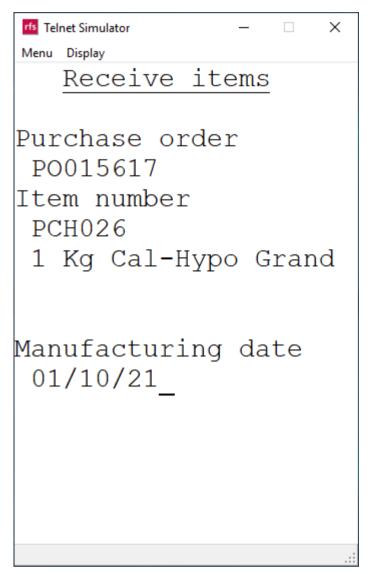
5. Select the line you want to receipt and then press Enter



6. Enter the batch number, then press Enter

```
Menu Display
<u>Receive items</u>
Purchase order
PO015617
Item number
PCH026
1 Kg Cal-Hypo Grand
Batch number
458878_
```

7. Enter the Manufacturing date as indicated by the supplier



8. Enter the quantity to be receipted 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 Te | Inet Simulator | | _ | | × |
|--------|----------------|-------|----|-----|-----|
| Menu | Display | | | | |
| | Receive | e ite | ms | | |
| | | | | | |
| Pur | chase d | order | | | |
| PC | 015617 | | | | |
| Ite | em numbe | er | | | |
| PC | CH026 | | | | |
| 1 | Kg Cal- | -Нуро | G | rar | nd |
| | 2 | | | | |
| Rem | aining | guan | ti | tv | |
| | 00 | Item | - | -1 | |
| | | | | | |
| Oua | Intity | | | | |
| | 000 | | | | |
| | _ | | | | |
| | | | | | |
| | | | | | .:: |

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

| rfs Telne | et Simulator | | _ | | \times |
|------------|--------------|-------|-----|-----|----------|
| Menu [| Display | | | | |
| I | Receive | e ite | ems | | |
| | | | | | |
| Purc | chase c | orde | r | | |
| PO | 015617 | | | | |
| Iter | n numbe | er | | | |
| PCH | 1026 | | | | |
| 1 1 | Kg Cal- | -Hype | эG | rar | nd |
| Quar | ntity | | | | |
| 500 | 00 | Ite | эm | | |
| | | | | | |
| Quar 0_ | ntity c | of la | abe | ls | |
| | | | | | |
| | | | | | .: |

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

```
Telnet Simulator – – ×

Menu Display

<u>Receive items</u>

Purchase order

PO015617

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

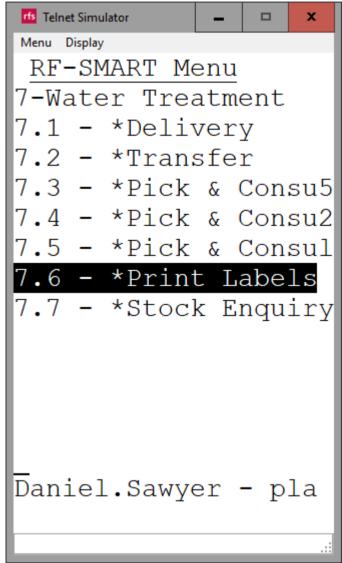
Note:- you can also press F4, this will allow you to exit the purchase order with the item line at status Registered. At this point goods are not available in AX to be used you can return to the purchase order later and press F3 to complete the product receipt

| rfs Tel | net Simulator | _ | | Х |
|---------|---------------|--------|-----|---|
| Menu | Display | | | |
| | Receive | items | | |
| | | | | |
| Pur | chase or | der | | |
| | 015617 | | | |
| | 010017 | | | |
| Tto | | | | |
| Ite | | | | |
| | | | | |
| Suc | cess | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Sc | an item | or F2 | to | |
| | st | | | |
| | | ack 1 | 22 | |
| | to go b | ack, I | : 5 | |
| tc |) exit | | | |
| | | | | |

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



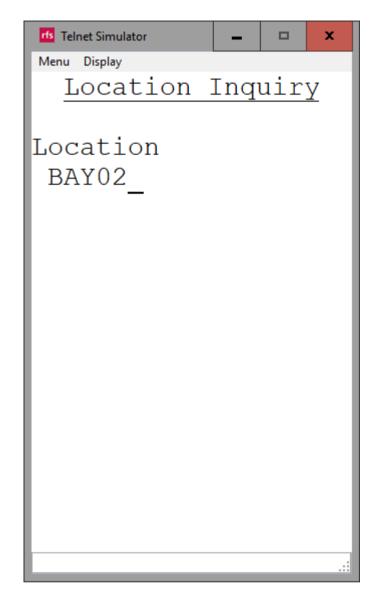
2. Label printing is done via a stock enquiry workflow, so we have set up predefined options to simplify the process

- 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

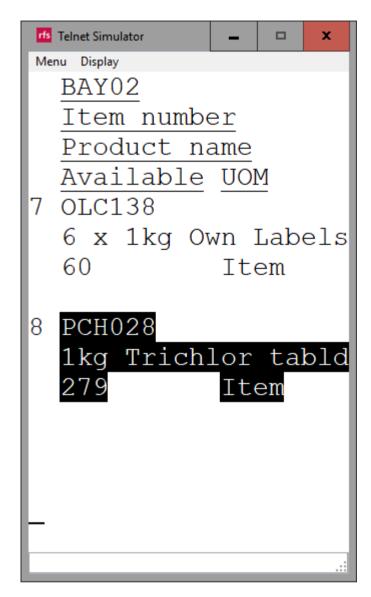
Select the option you require then press Enter

| rfs Telnet Simu | ulator | - | | x |
|-----------------|--------|------|------------|-----|
| Menu Display | | | | |
| RF-SN | 1ART | Men | u | |
| 7.6-Pi | cint | Labe | els | |
| 7.6.1 | - Sr | nall | | |
| 7.6.2 | - Sr | nall | WH4 | 5 |
| 7.6.3 | - Sr | nall | WH4 | 1 |
| 7.6.4 | - La | arge | WH4 | 5 |
| 7.6.5 | | _ | | |
| 7.6.6 | | _ | | |
| 7.6.7 | - Ba | atch | Num | bev |
| | | | | |
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| <u> </u> | | | | , |
| Daniel | L.Sav | vyer | - p | Ia |
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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

