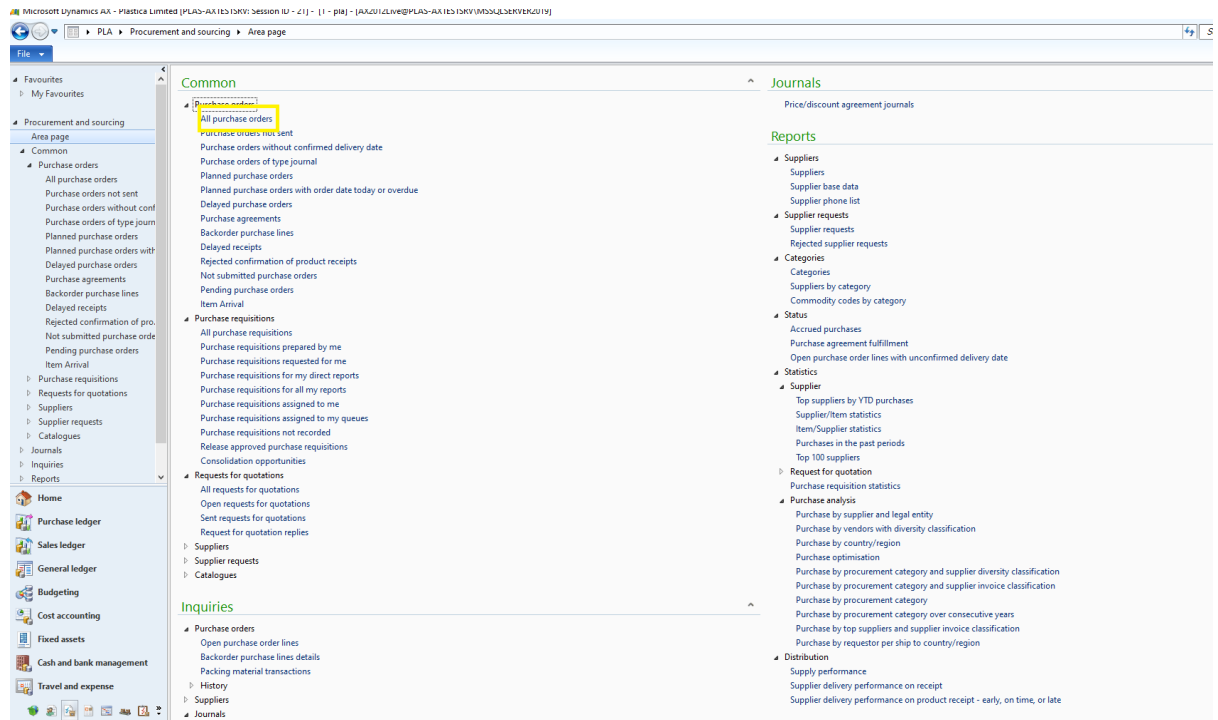


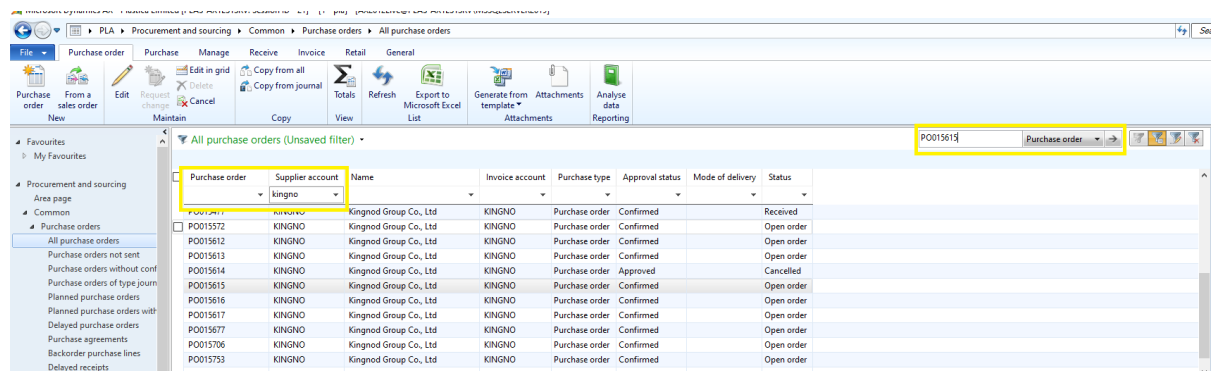
How to Receipt a delivery

Receipting a purchase order in AX

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



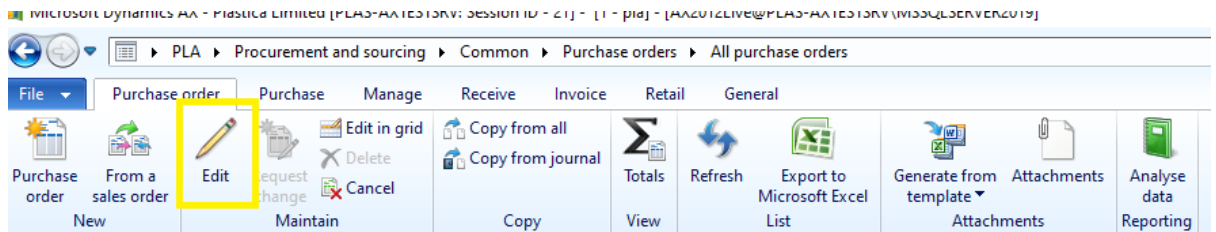
2. Enter the purchase order number you want to receipt, you can either enter this in the search bar or in the purchase order column filter. If you do not know the purchase order number you can search by supplier



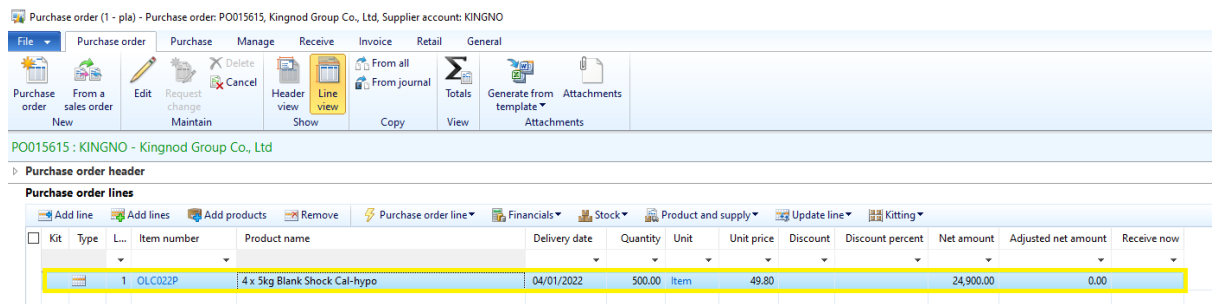
3. If the item has a supplier generated batch number you must manually create the record in AX. Receipting via RF Smart will automatically do this for you.

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

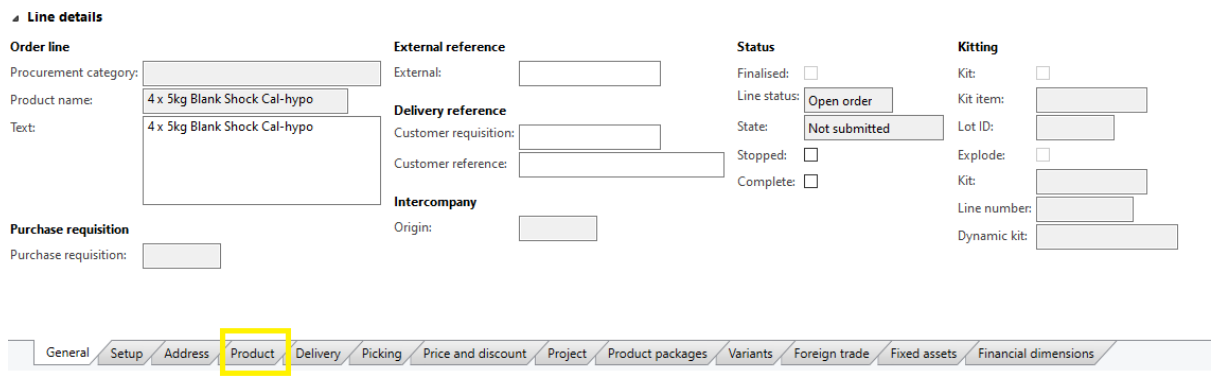
On the Navigation Ribbon Click on Edit



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



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



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

Line details

Product dimensions

Configuration:

Size:

Colour:

Style:

Tracking dimensions

Batch number:

Serial number:

Item reference

Reference type:

Reference number:

Reference lot:

Foreign trade

Transaction code:

Statistics procedure:

Triangular deal: ☐

Triangular deal: ☐

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

7. Click New

Batches (1 - pla) - Batch number: 20150914LBP04, 28404BS

File New Delete On-hand Transactions Item tracing Trace

Overview General Description

| Batch number | Item number | Manufacturing date | Expiration date |
|---------------|-------------|--------------------|-----------------|
| 20150914LBP04 | 28404BS | 14/09/2015 | 14/09/2020 |
| 20151121LBP05 | 28404BS | 21/11/2015 | 21/11/2020 |
| 20170608LBP15 | 28404BS | 19/01/2018 | 19/01/2018 |
| 20171113LBP15 | 28404BS | 19/01/2018 | 19/01/2018 |
| 20171121LBP15 | 28404BS | 19/01/2018 | 19/01/2018 |
| 20171122LBP15 | 28404BS | 19/01/2018 | 19/01/2018 |
| 20171230LBP15 | 28404BS | 26/04/2018 | 26/04/2018 |
| 20180102LBP15 | 28404BS | 26/04/2018 | 26/04/2018 |
| 20151121LBP05 | 28408BS | 21/11/2015 | 21/11/2020 |
| 20151123LBP05 | 28408BS | 23/11/2015 | 29/02/2020 |
| 20151211LBP05 | 28408BS | 11/12/2015 | 11/12/2020 |
| 20180126LBP15 | 28408BS | 12/04/2018 | 12/04/2018 |
| 20180815LBP15 | 28408BS | 24/01/2019 | 24/01/2019 |
| 20180816LBP15 | 28408BS | 24/01/2019 | 24/01/2019 |
| 20181201LBP15 | 28408BS | 24/01/2019 | 24/01/2019 |
| 2020101 | 28426BS | 29/03/2021 | 29/03/2021 |
| 20201204 | 28428BS | 04/12/2020 | 08/03/2021 |
| 121340 | 7957 | 13/01/2022 | 13/01/2022 |
| 121346 | 7957 | 29/11/2021 | 29/11/2021 |
| OL202000008 | 7957-BOX | 18/02/2021 | 18/02/2023 |
| OL202000019 | 7957-BOX | 10/03/2021 | 10/03/2023 |
| OL202000025 | 7957-BOX | 09/04/2021 | 09/04/2023 |
| OL202000031 | 7957-BOX | 04/05/2021 | 04/05/2023 |
| OL202000037 | 7957-BOX | 21/01/2021 | 21/01/2023 |
| OL202000038 | 7957-BOX | 22/02/2021 | 22/02/2023 |

Batch dimensi... GBP USR Model pla initial 12/01/2022 AX2012CopyofLive Close

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

Batches (1 - pla) - New Record

File New Delete On-hand Transactions Item tracing Trace

Overview General Description

| Batch number | Item number | Manufacturing date | Expiration date |
|--------------|-------------|--------------------|-----------------|
| 128507 | OLC022P | 31/10/2021 | 04/01/2022 |

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 dimensions

Configuration:

Size:

Colour:

Style:

Tracking dimensions

Batch number:

Serial number:

Statistics procedure:

Triangular deal:

Triangular deal:

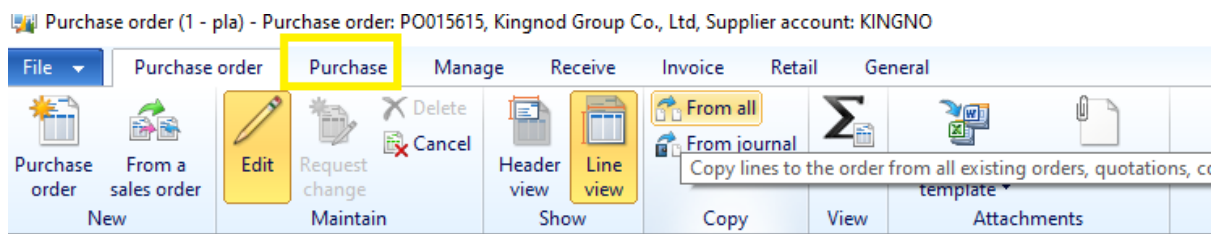
General Setup Address Product Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets Financial dimensions

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

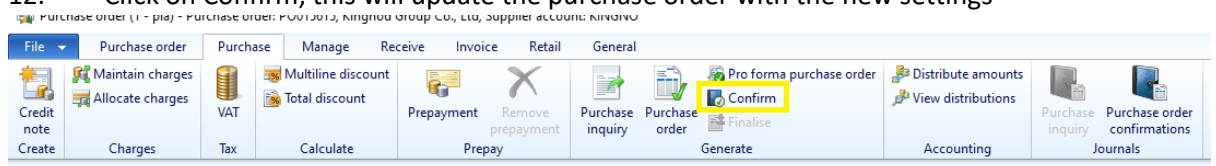
Repeat this step for every item on the purchase order that needs to be updated with a different warehouse or location

The screenshot shows a form with three main sections: Product dimensions, Storage dimensions, and Item reference. The Storage dimensions section is highlighted with a yellow box, showing Warehouse: 45 and Location: GOODSIN. The Item reference section shows Reference type, Reference number, and Reference lot. The Product dimensions section shows Configuration, Size, Colour, and Style. The Tracking dimensions section shows Batch number (128507) and Serial number. The Foreign trade section shows Transaction code, Statistics procedure, and Triangular deal checkboxes. Below the form is a navigation bar with tabs: General, Setup, Address, Product, Delivery, Picking, Price and discount, Project, Product packages, Variants, Foreign trade, Fixed assets, and Financial dimensions.

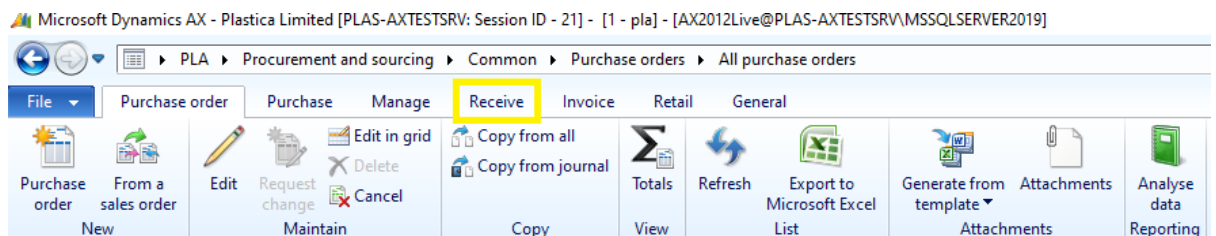
11. On the Navigation Ribbon click on the Purchase tab



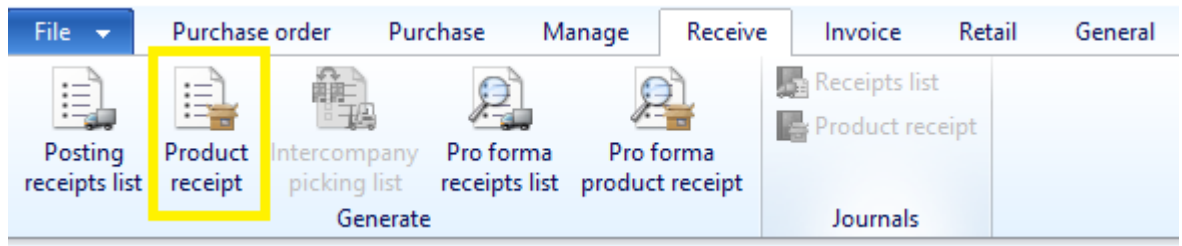
12. Click on Confirm, this will update the purchase order with the new settings



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.

The screenshot shows the 'Posting product receipt (1 - pla)' dialog box. It has a 'Parameters' tab and an 'Other' tab. The 'Parameters' section includes 'Quantity' (set to 'Ordered quantity'), 'Posting' (checked), and 'Print options' (Print: After, Print product receipt: checked, Use print management destination: unchecked, Print sales documents: unchecked). The 'Other' section has buttons for 'Select', 'Arrange', 'Totals', 'VAT (b)', and 'Printer setup'. Below the tabs is a table with columns: 'Update', 'Purchase order', 'Name', and 'Product receipt'. The table contains one row with a checkmark in the 'Update' column, 'PO015615' in the 'Purchase order' column, 'Kingnod Group Co., Ltd.' in the 'Name' column, and '454878' in the 'Product receipt' column. The 'Product receipt' field is highlighted with a yellow box. At the bottom right are 'OK', 'Cancel', and 'Batch' buttons.

| Update | Purchase order | Name | Product receipt |
|--------|----------------|-------------------------|-----------------|
| ✓ | PO015615 | Kingnod Group Co., Ltd. | 454878 |

16. Click on Lines

Posting product receipt (1 - pla)

Parameters
Other

Parameters
Quantity:
Posting: ☒

Print options
Print:
Print product receipt: ☒
Use print management destination: ☐
Print sales documents: ☐

Select
Arrange
Totals
VAT (b)
Printer setup

Overview
Setup
Lines
Line details
Purchases
Fixed assets

New
Delete

| | Update | Purchase order | Name | Product receipt |
|-------------------------------------|--------|----------------|------------------------|-----------------|
| <input checked="" type="checkbox"/> | | 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)

Parameters
Other

Parameters
Quantity:
Posting: ☒

Print options
Print:
Print product receipt: ☒
Use print management destination: ☐
Print sales documents: ☐

Select
Arrange
Totals
VAT (b)
Printer setup

Overview
Setup
Lines
Line details
Purchases
Fixed assets

Delete
Purchase order line
Stock
Update line

| 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"/> | |

OK
Cancel
Batch

Standard item description.

18. The product receipt will print to the screen

Show product receipt (1)

File

1 of 1 100% Find | Next

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

Telephone
Fax
BACS / CHAPS
Tax registration number

Product receipt

Page 1 of 1
Purchase order [PO015615](#)
Date 12/01/2022
Delivery note 144848
Internal product receipt PLA-015883

Kingnod Group Co., Ltd
4th Floor Jiezhongyuan
3 Poyanghu Road
Qingdao City
SHANDONG PROVINCE
China

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 |

Close

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

The screenshot shows a web application window titled "Show product receipt (1)". The "File" menu is open, and the "Print" option is selected, which has opened a sub-menu. In this sub-menu, the "Print..." option (with the keyboard shortcut Ctrl+P) is highlighted. Other options in the sub-menu include "Print Preview", "Page setup", and "Printer setup...".

The main content area displays a "Product receipt" for item "4 x 5kg Blank Shock Cal-hypo". The receipt includes the following details:

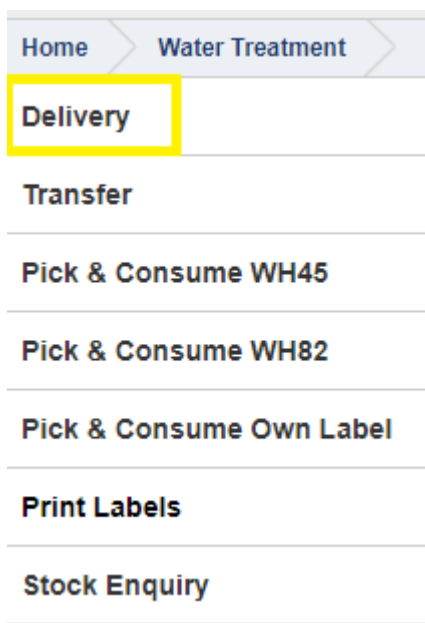
- Telephone
- Fax
- BACS / CHAPS
- Tax registration number
- 1 of 1
- PO015615
- 12/01/2022
- 144848
- PLA-015883
- Delivery address: Plastica Ltd, Perimeter House, Napier Road, St Leonards-on-sea, East Sussex, TN38 9NY, United Kingdom

At the bottom of the window, there is a table with the following data:

| 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 |

Receipting a Purchase order via RF Smart Web Client

1. Select Delivery from the Water Treatment menu



The screenshot shows a web client interface with a breadcrumb trail at the top: 'Home' followed by 'Water Treatment' with a right-pointing arrow. Below this, a list of menu items is displayed, each on a separate line with a horizontal separator. The 'Delivery' item is highlighted with a yellow rectangular box. The other menu items are 'Transfer', 'Pick & Consume WH45', 'Pick & Consume WH82', 'Pick & Consume Own Label', 'Print Labels', and 'Stock Enquiry'.

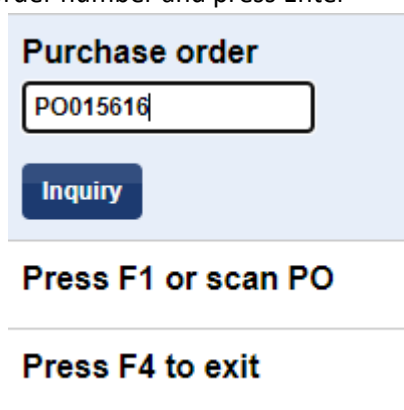
Note:- the purchase order receipt workflows have been designed to minimise user input, if you have multiple items on a purchase order and you want to receipt them in do different warehouse you must repeat the following steps for each item on the purchase order

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



The screenshot shows the web client interface with the breadcrumb trail 'Home' > 'Water Treatment' > 'Delivery'. Below the breadcrumb, there is a list of three options: 'WH45 Receipt', 'WH41 Receipt', and 'WH82 Receipt', each on a separate line with a horizontal separator.

3. Enter the purchase order number and press Enter



The screenshot shows a form titled 'Purchase order' in bold. Below the title is a text input field containing the value 'PO015616'. Below the input field is a blue button with the text 'Inquiry'. Below the button, there are two lines of text: 'Press F1 or scan PO' and 'Press F4 to exit', each on a separate line with a horizontal separator.

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 batch number, then press Enter

Purchase order
PO015616

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

Batch number

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 receipted to and press Enter

Purchase order
PO015616

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

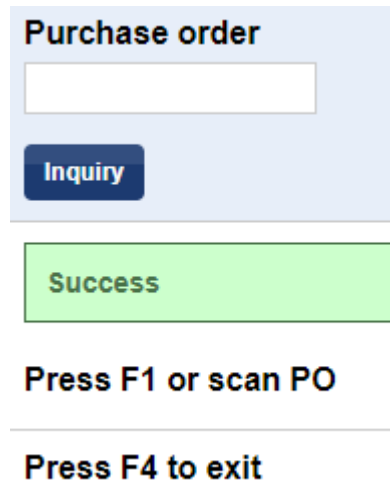
Quantity
500
Item

Location

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

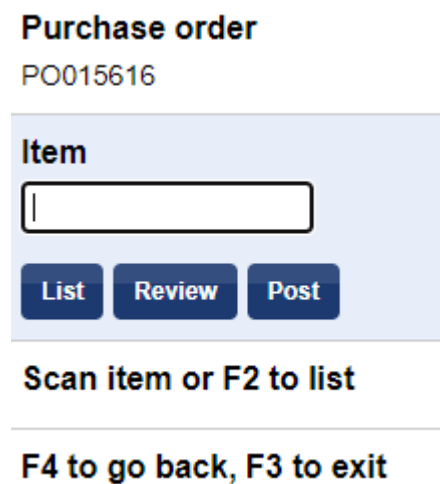
Success

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

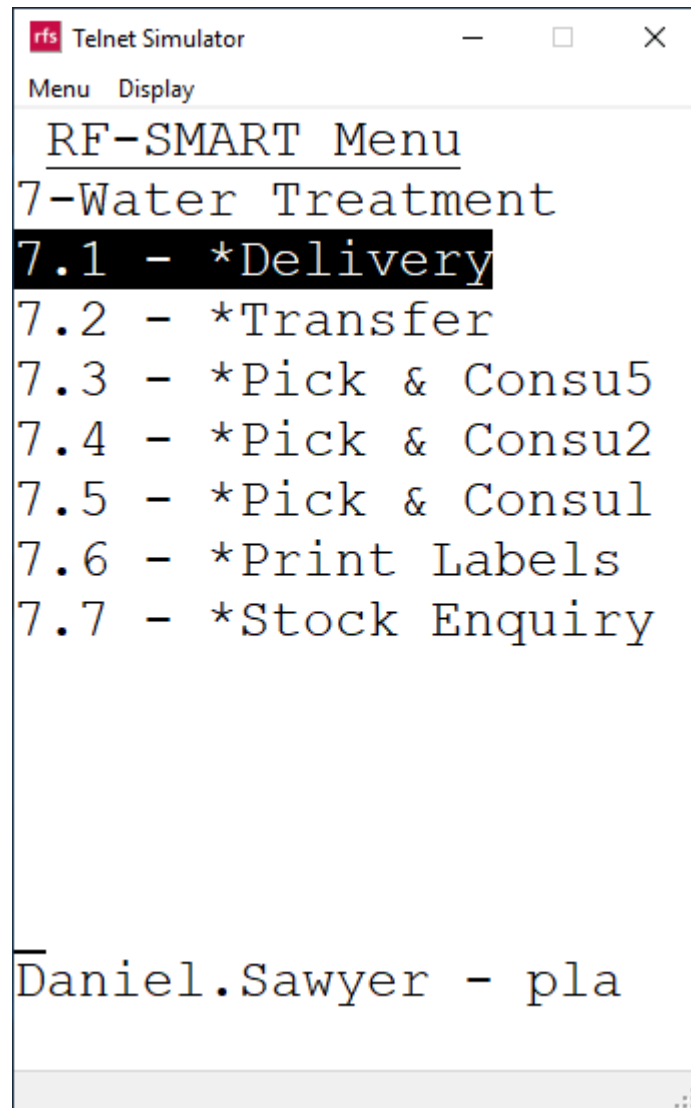
List **Review** **Post**

Scan item or F2 to list

F4 to go back, F3 to exit

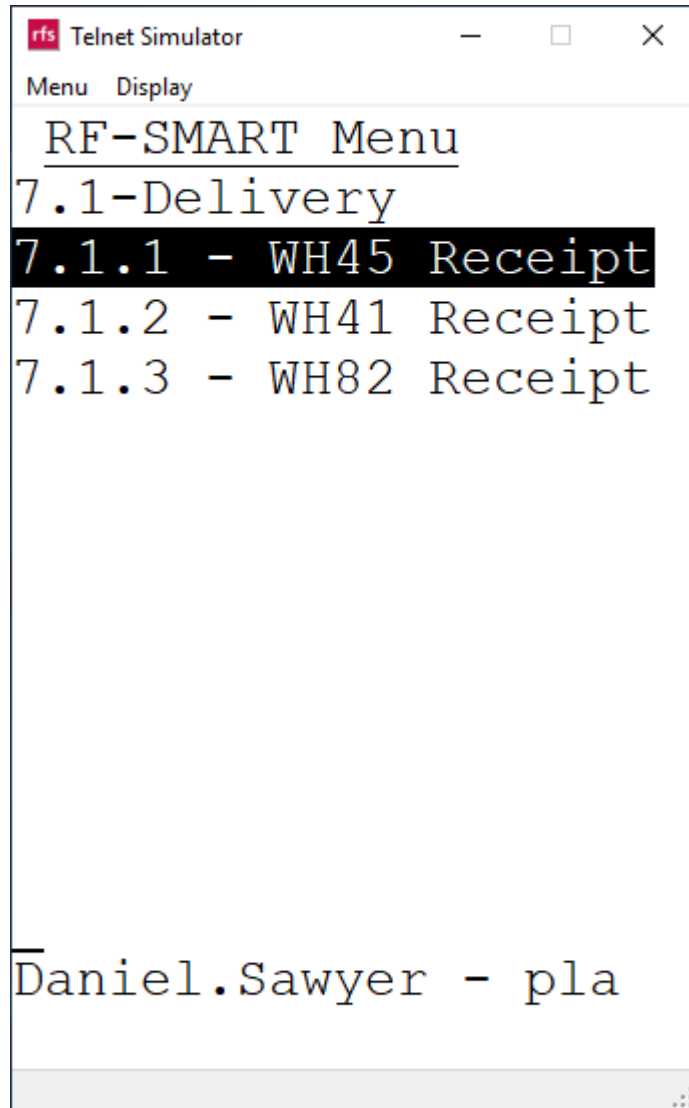
Receipting a Purchase order via RF Smart hand held device (Gun)

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 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

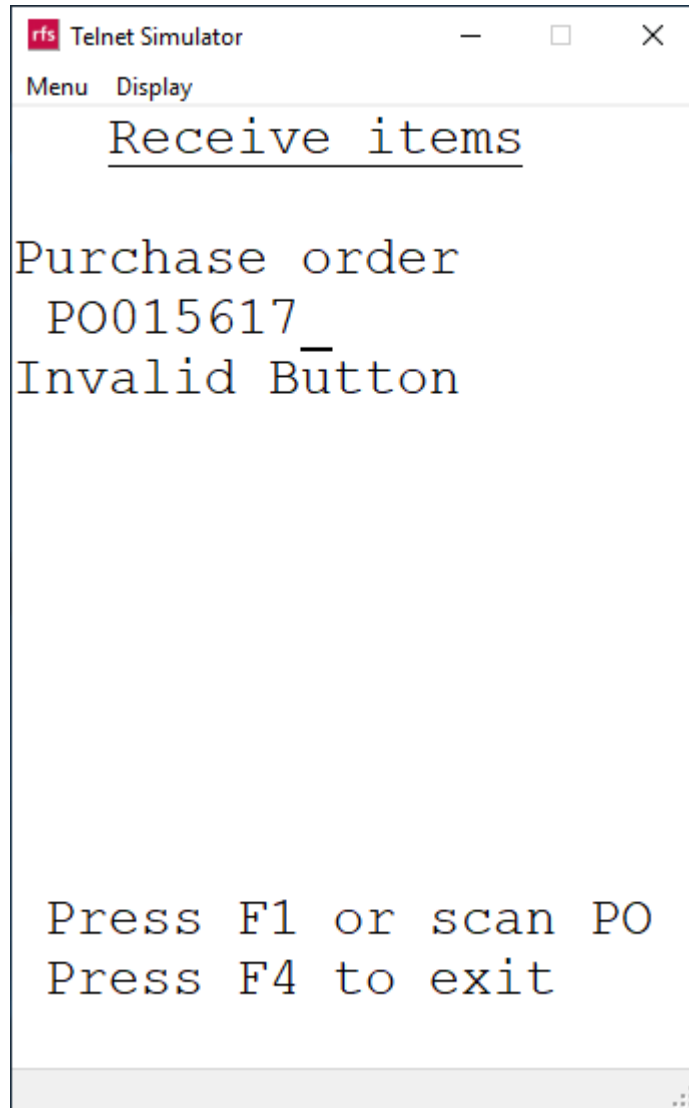


The screenshot shows a Telnet Simulator window with a menu displayed. The menu is titled "RF-SMART Menu" and lists three options under the heading "7.1-Delivery". The first option, "7.1.1 - WH45 Receipt", is highlighted with a black background. The second option is "7.1.2 - WH41 Receipt" and the third is "7.1.3 - WH82 Receipt". At the bottom of the window, the text "Daniel.Sawyer - pla" is visible.

```
rfs 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

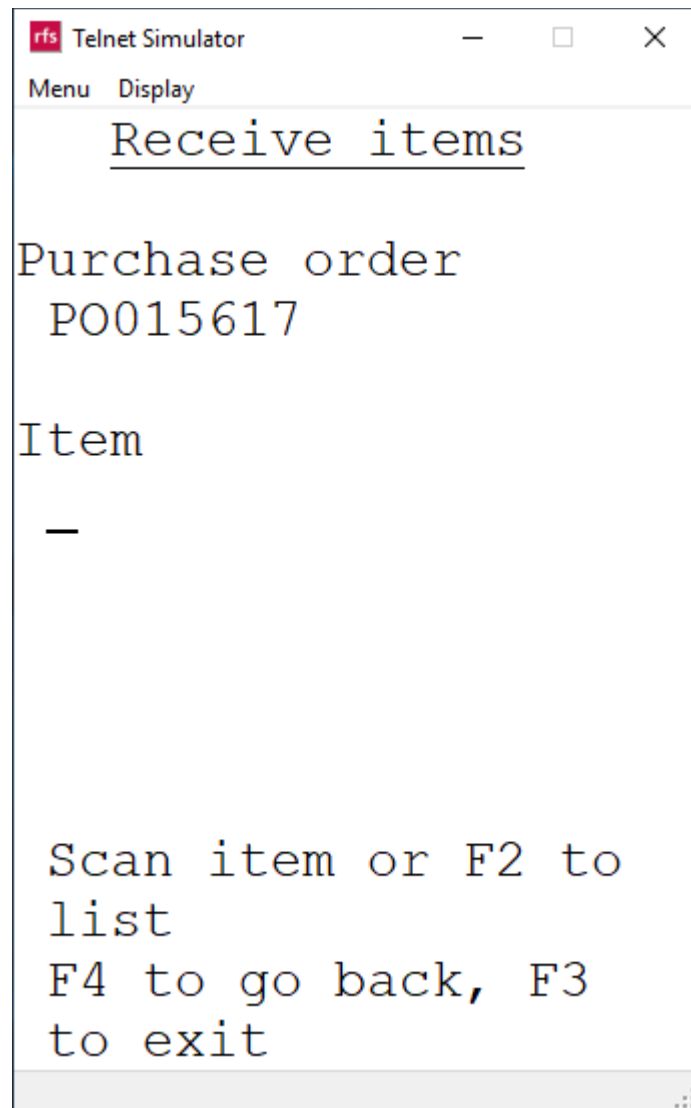
Daniel.Sawyer - pla
```


3. Enter the purchase order number then press Enter

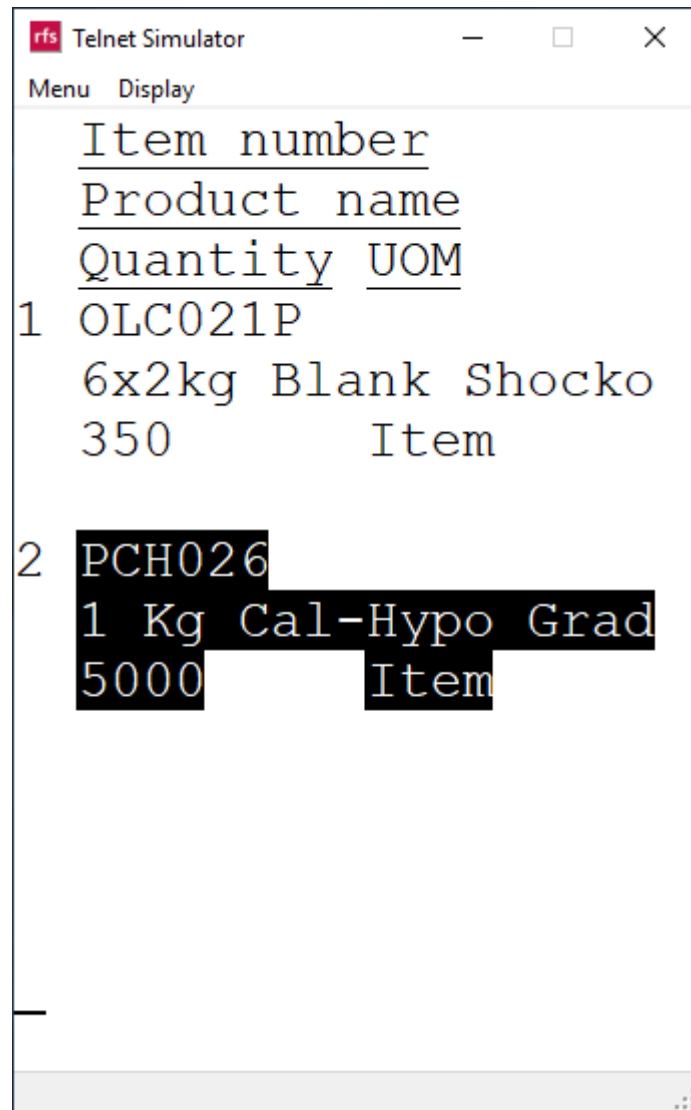


4. Press F2 to list the open lines on the purchase order

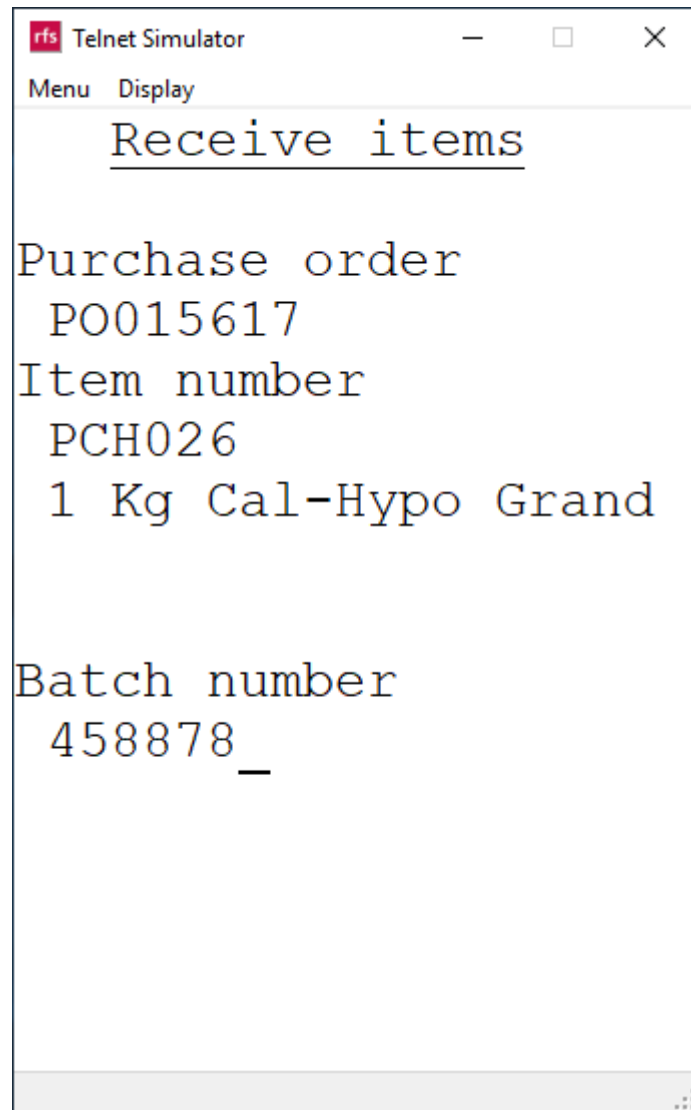
Note:- it is important that List button is pressed and you do not manually enter in the item number otherwise the batch number will not be created



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



6. Enter the batch number, then press Enter



The screenshot shows a window titled "rfs Telnet Simulator" with a menu bar containing "Menu" and "Display". The main display area contains the following text:

Receive items

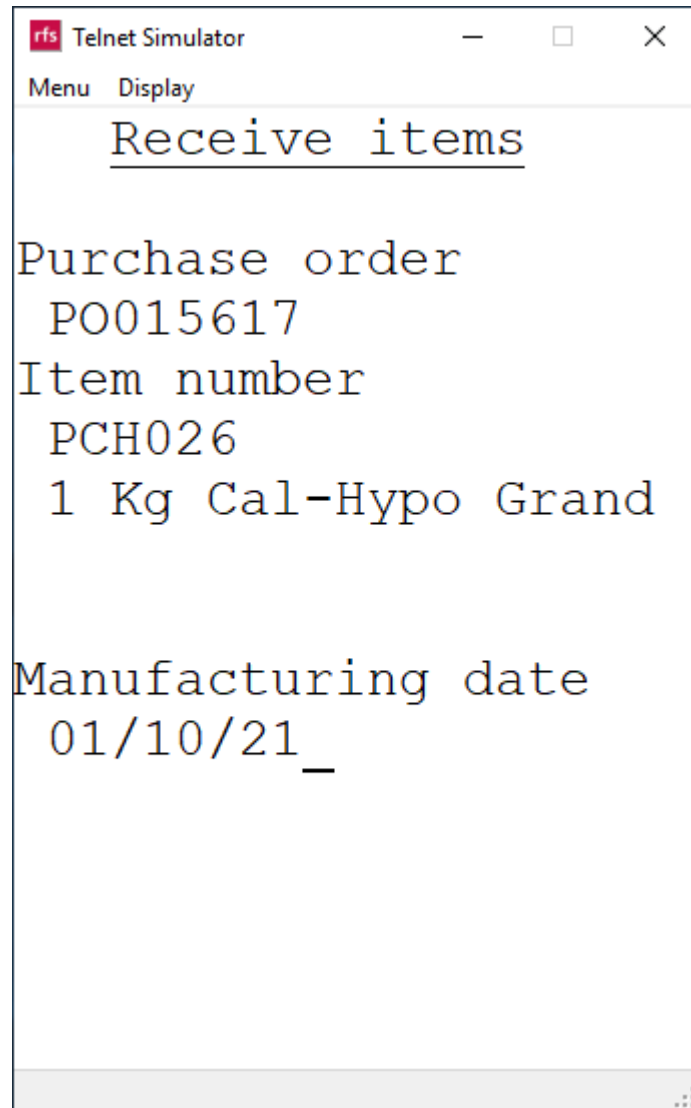
Purchase order
PO015617

Item number
PCH026
1 Kg Cal-Hypo Grand

Batch number
458878_

The text is displayed in a monospaced font. The "Batch number" line shows the input "458878_" with a cursor at the end of the line.

7. Enter the Manufacturing date as indicated by the supplier



The screenshot shows a window titled 'rfs Telnet Simulator' with a menu bar containing 'Menu' and 'Display'. The main display area shows the following text:

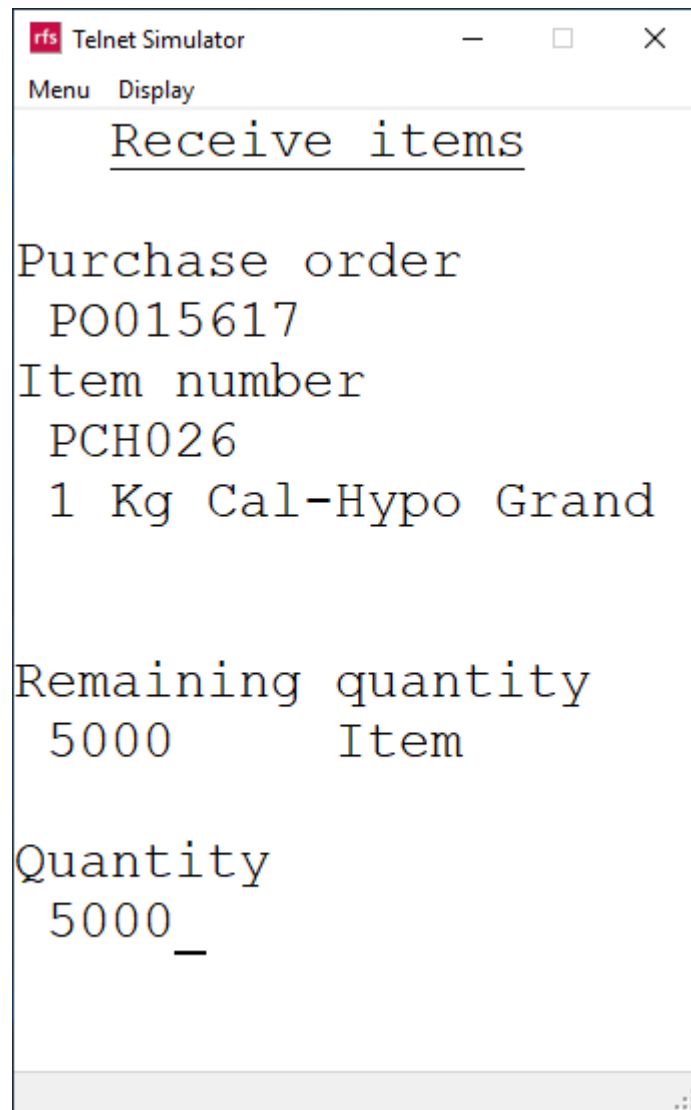
Receive items

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

Manufacturing date
01/10/21_

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



Telnet Simulator

Menu Display

Receive items

Purchase order
PO015617

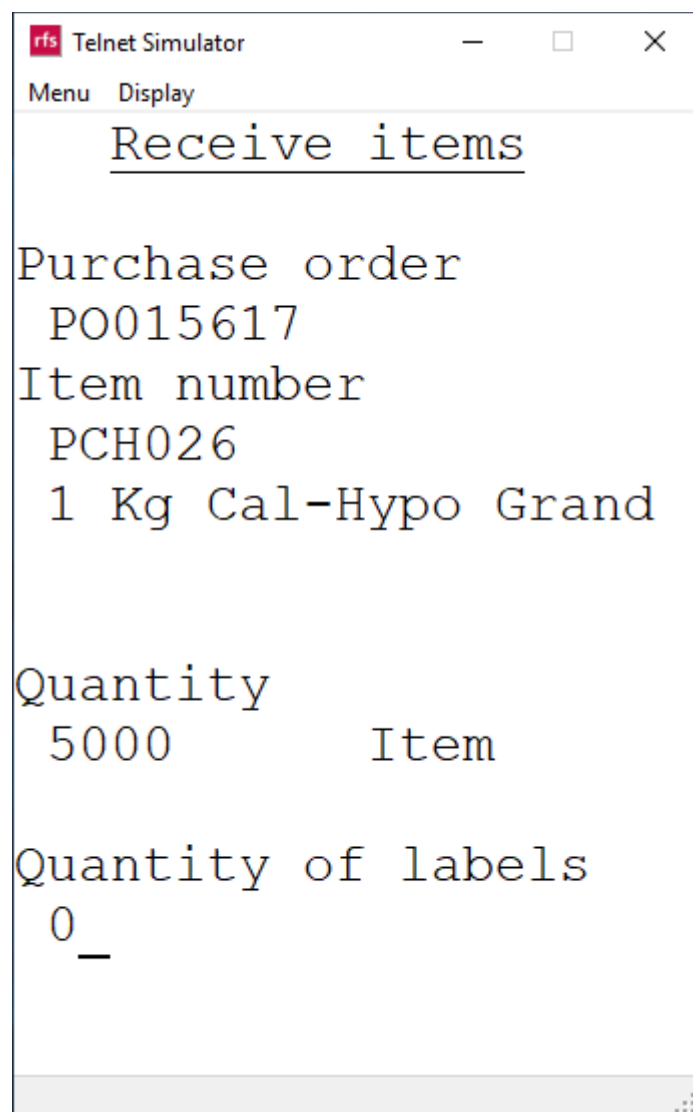
Item number
PCH026

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



Telnet Simulator

Menu Display

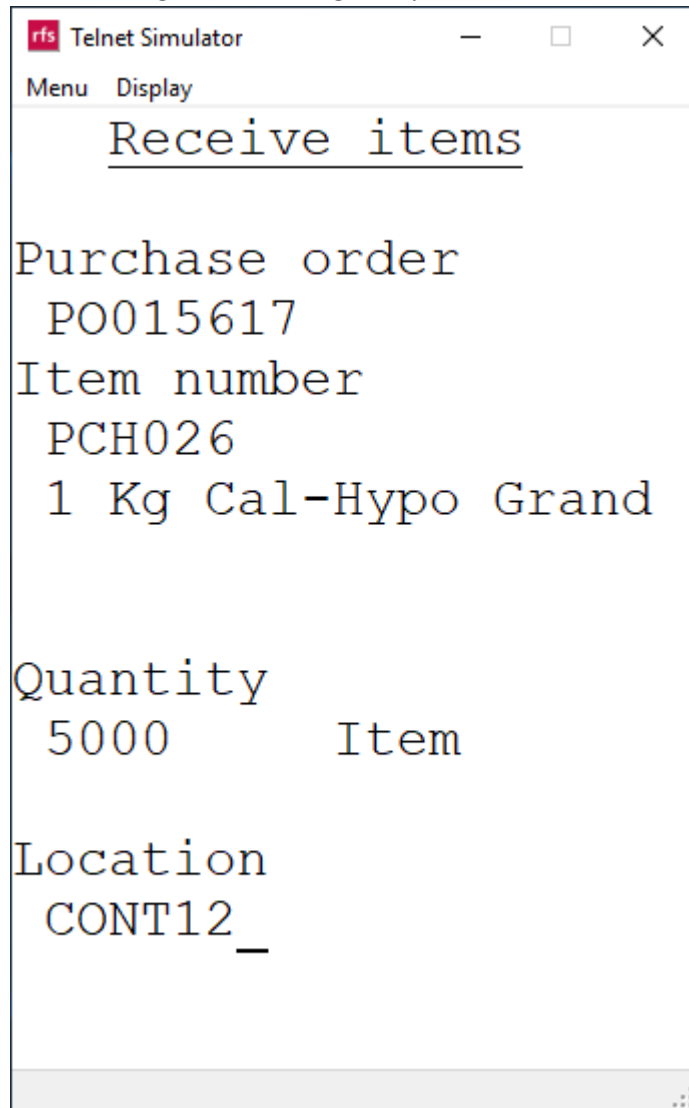
Receive items

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

Quantity
5000 Item

Quantity of labels
0
_

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



The image shows a screenshot of a 'Telnet Simulator' window. The window has a title bar with 'rfs Telnet Simulator' and standard window controls. Below the title bar is a menu bar with 'Menu' and 'Display'. The main content area displays a form titled 'Receive items' which is underlined. The form contains the following text: 'Purchase order' followed by 'PO015617', 'Item number' followed by 'PCH026', '1 Kg Cal-Hypo Grand', 'Quantity' followed by '5000' and 'Item', and 'Location' followed by 'CONT12_'. The text is in a monospaced font. At the bottom right of the window, there is a small icon of a mouse cursor.

Menu Display

Receive items

Purchase order
PO015617

Item number
PCH026
1 Kg Cal-Hypo Grand

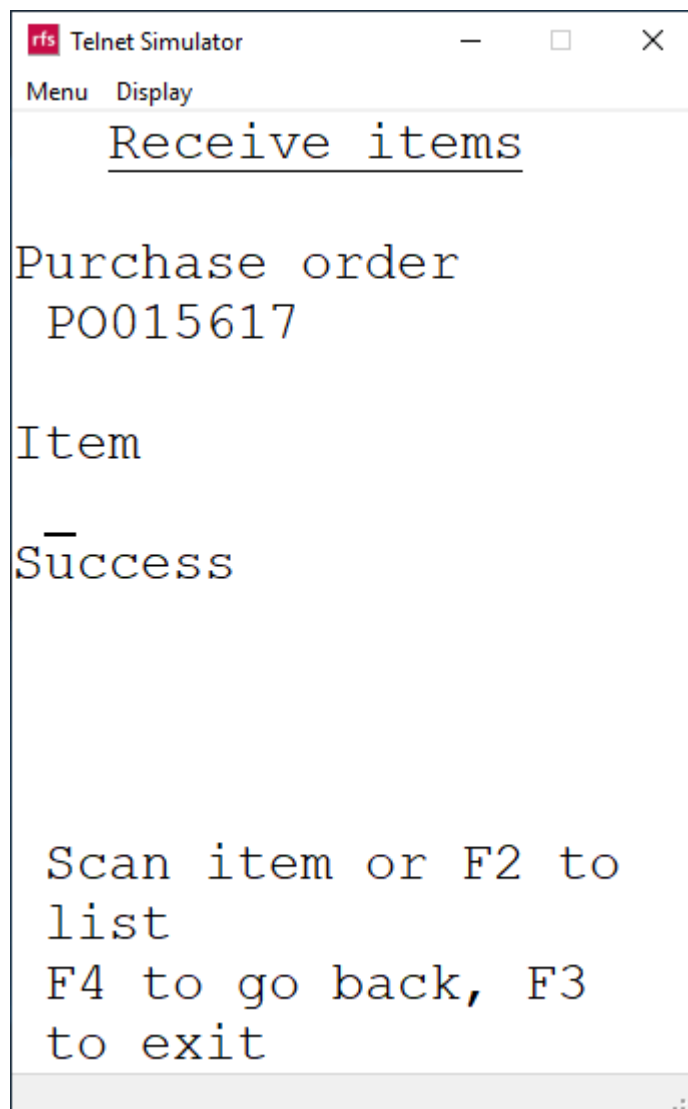
Quantity
5000 Item

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

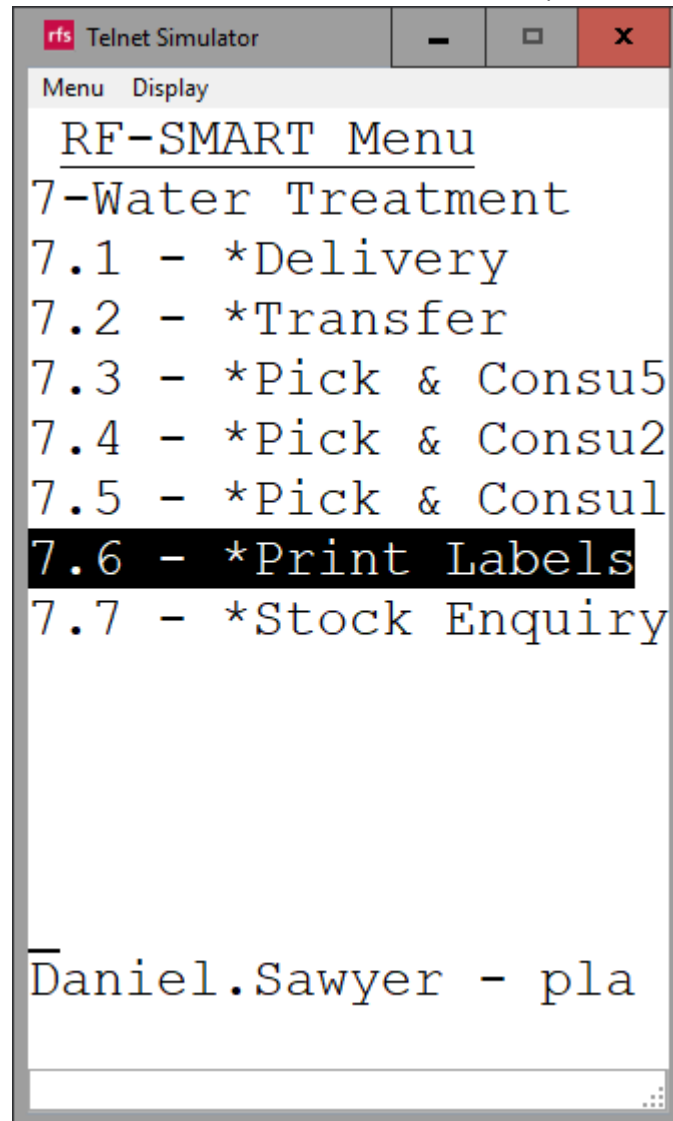
Note:- you can also press F4, this will allow you to exit the purchase order with the item line at status Registered. At this point goods are not available in AX to be used you can return to the purchase order later and press F3 to complete the product receipt



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.

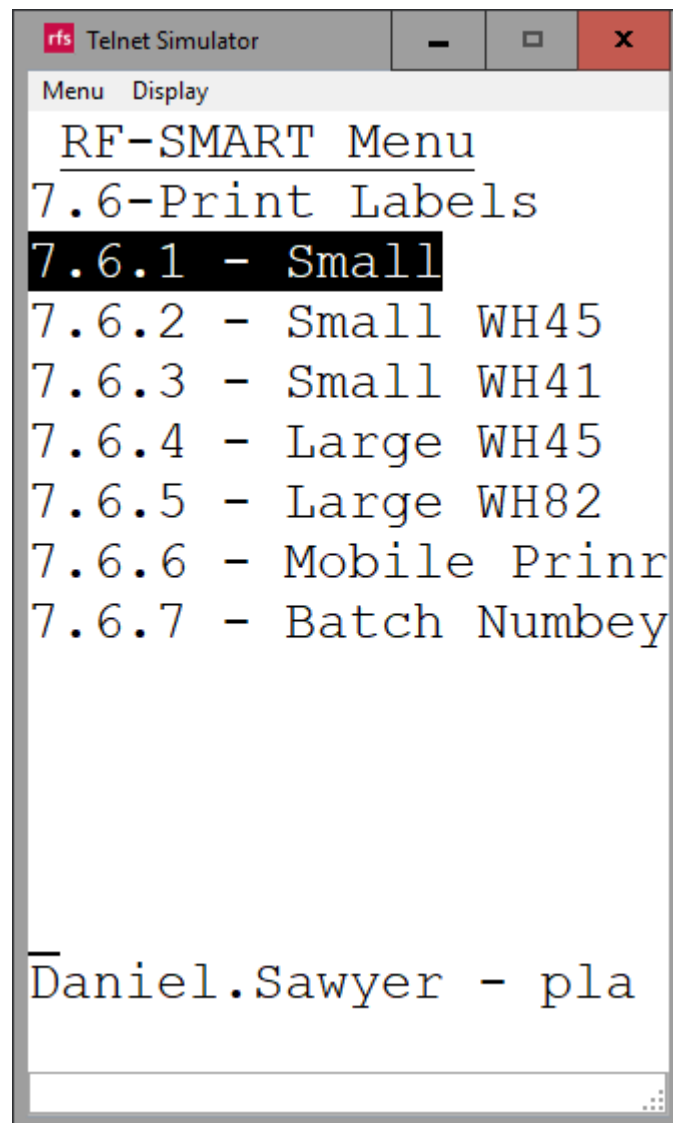
1. Under the Water Treatment menu select Print Labels option



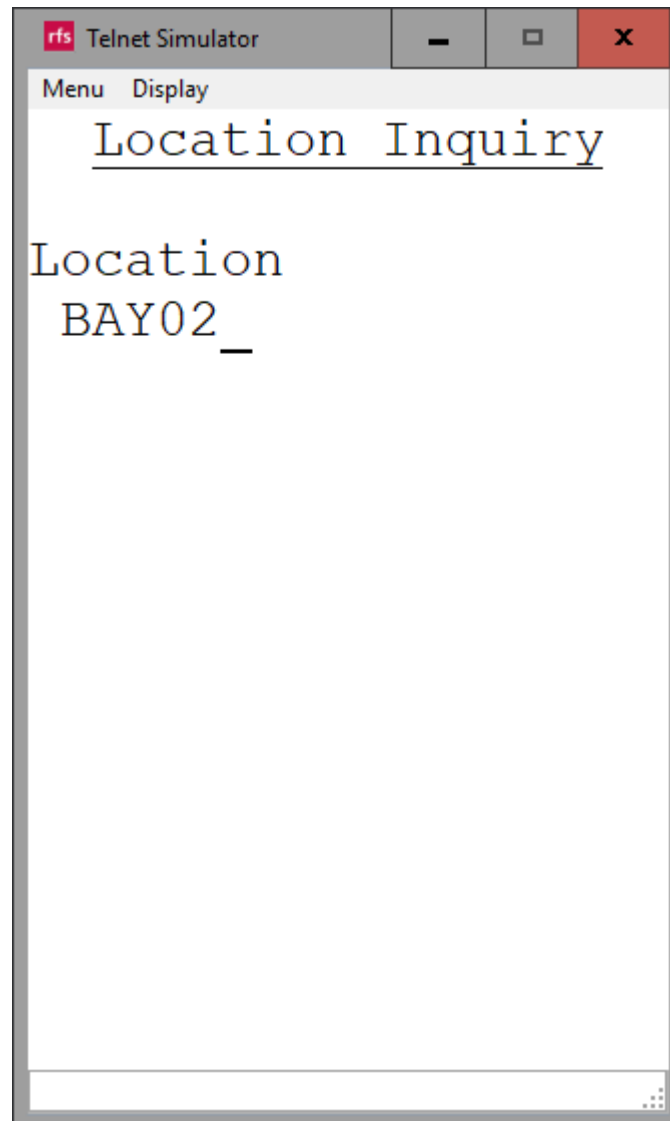
2. Label printing is done via a stock enquiry workflow, so we have set up predefined options to simplify the process

- 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

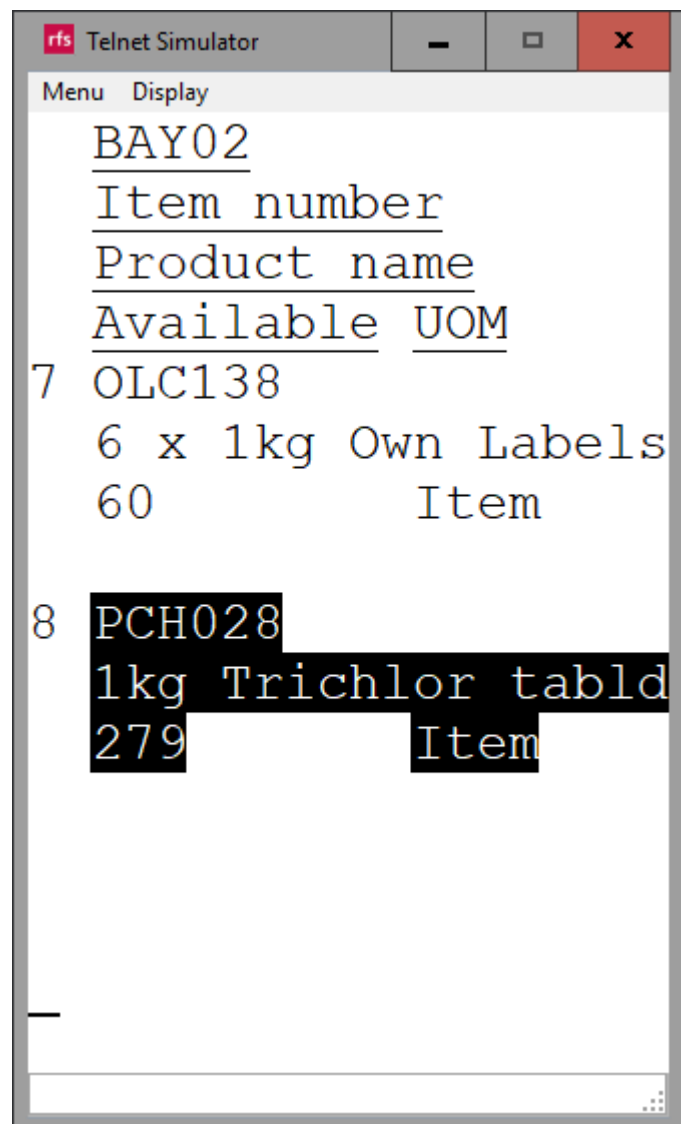
Select the option you require then press Enter



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

