

WAREHOUSE

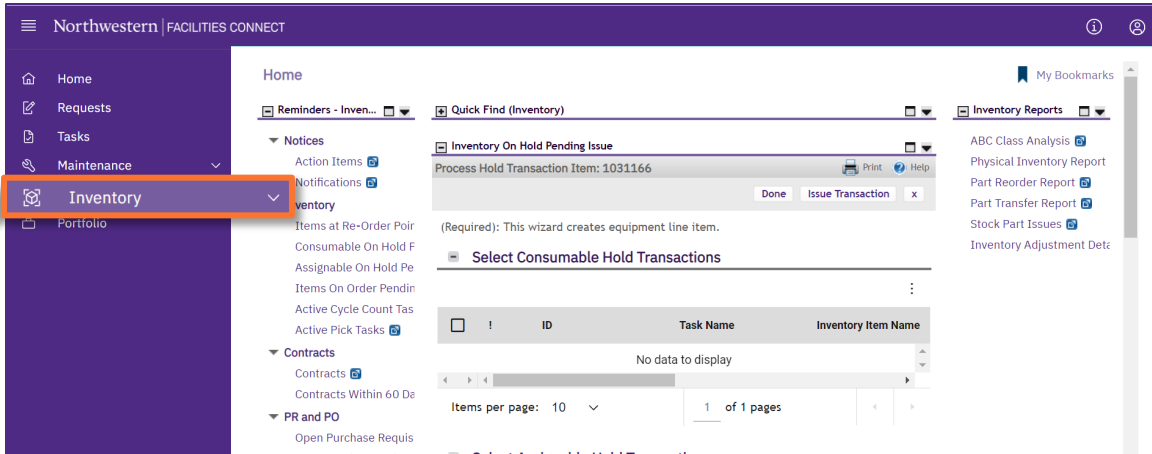
RECEIVE AND ISSUE DIRECT POS

Provides guidance for how to receive inventory for direct parts.

DIRECTIONS:

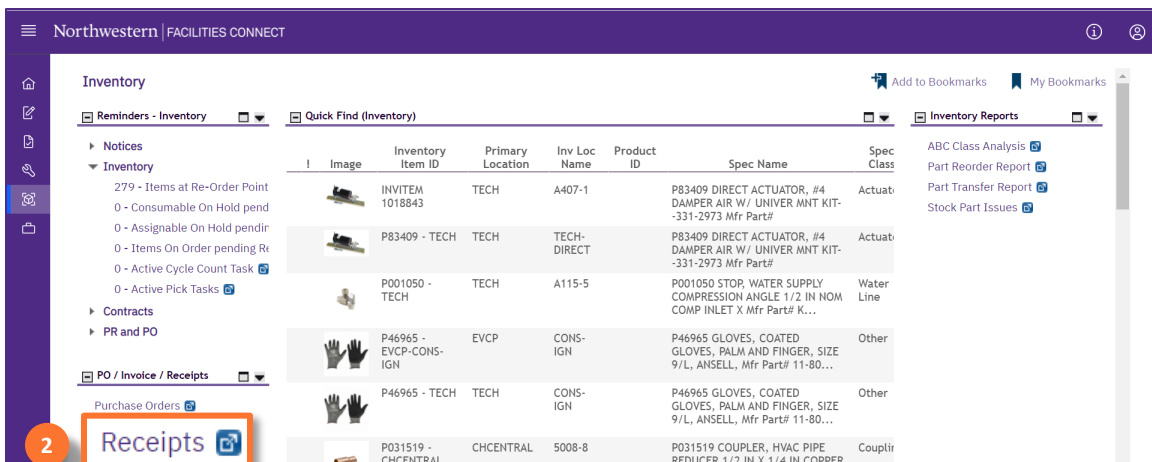
1 From the **Facilities Connect Home Screen**:

1 Click on the **Inventory** screen.



2 From the **Inventory** screen:

2 Click on **Receipts**.



TIP & TRICKS

If you want the Receipts screen to open in a new window, click on the blue arrow next to Receipts



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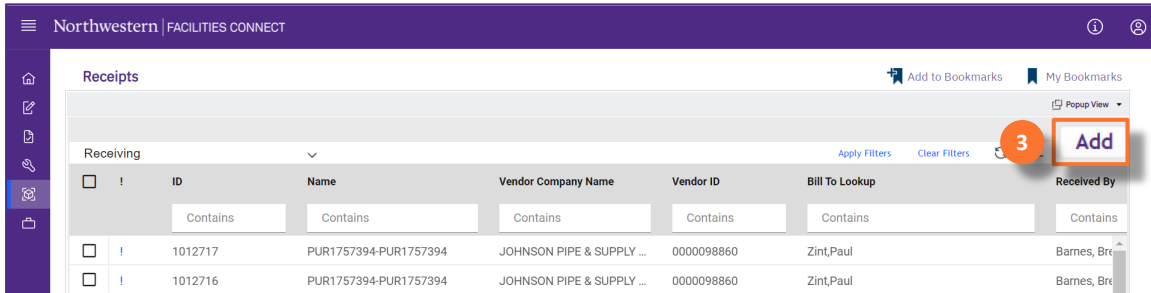
RECEIVE AND ISSUE DIRECT POS

DIRECTIONS:

3

Upon clicking, the **Receipts** window will open:

3 Click on **Add**



4

Upon clicking, a **Receiving** record will open in a new window.

On the **General** tab:

4a Locate the **Purchase Order** section.

4b Click on **Find**

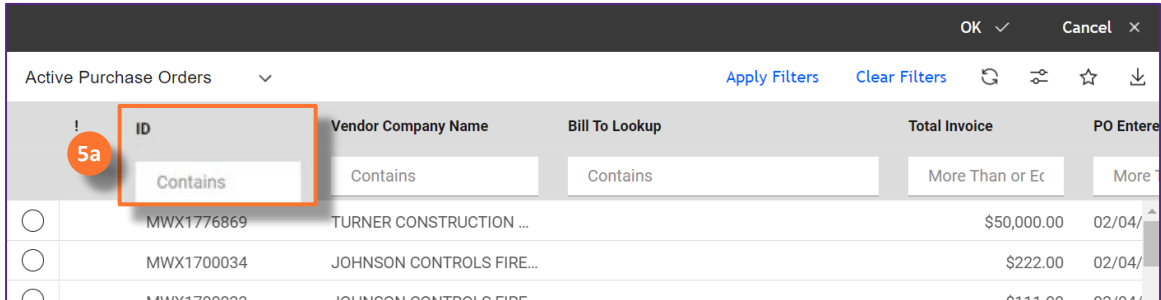


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DIRECTIONS:

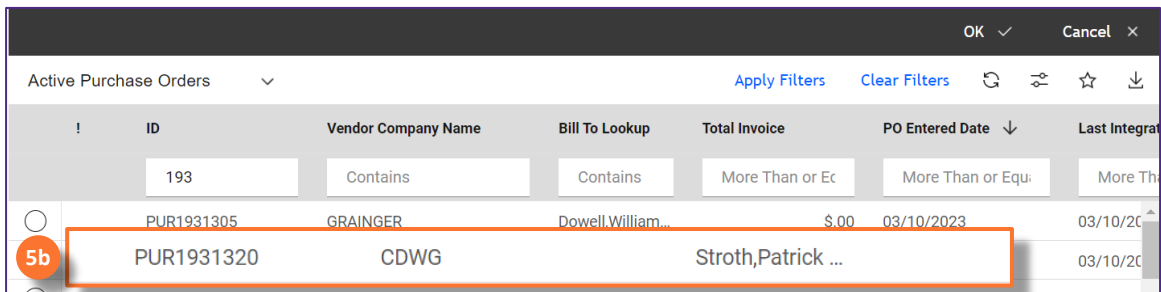
5 Upon clicking, the **Active Purchase Order** window will open:

5a Enter the **PO#** in the ID box and press **Enter**.



ID	Vendor Company Name	Bill To Lookup	Total Invoice	PO Entered
Contains	Contains	Contains	More Than or Ec	More
MWX1776869	TURNER CONSTRUCTION ...		\$50,000.00	02/04/
MWX1700034	JOHNSON CONTROLS FIRE...		\$222.00	02/04/
MWX1700022	JOHNSON CONTROLS FIRE		\$111.00	02/04/

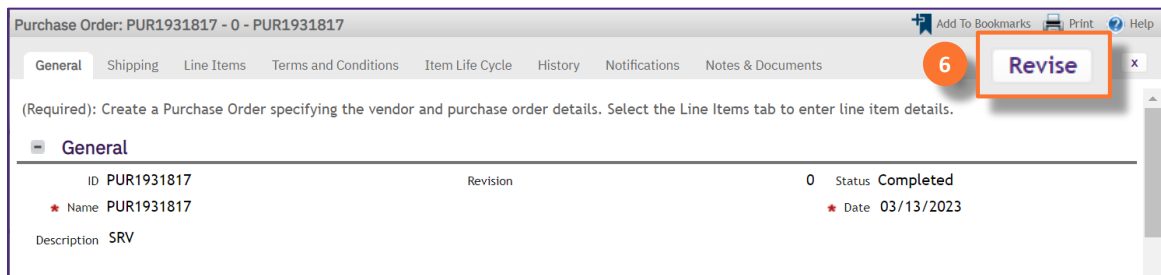
5b Click on the **PO number** that you wish to open. **DO NOT** click the radio button but click directly on the PO line.



ID	Vendor Company Name	Bill To Lookup	Total Invoice	PO Entered Date	Last Integrat
193	Contains	Contains	More Than or Ec	More Than or Equ.	More Th
PUR1931305	GRAINGER	Dowell,William...	\$,00	03/10/2023	03/10/20
PUR1931320	CDWG	Stroth,Patrick ...			03/10/20

6 Upon clicking, the **PO Window** will open:

6 Click on the **Revise** button.



Purchase Order: PUR1931817 - 0 - PUR1931817

General Shipping Line Items Terms and Conditions Item Life Cycle History Notifications Notes & Documents

(Required): Create a Purchase Order specifying the vendor and purchase order details. Select the Line Items tab to enter line item details.

General

ID PUR1931817 Revision 0 Status **Completed**

Name PUR1931817 Date 03/13/2023

Description SRV

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DIRECTIONS:

7 Upon clicking, the **Contract Revision** window will open:

7 Click on the **Continue** button.

8 From the **Revision in Progress** status:

8a Scroll down to the **Bill To** section.

8b Begin to type the **Technician name** and select their name once they appear.

HR ID	Net ID	Name	Primary Organization
1025787	pzi167	Zint,Paul	Central Engineer

8c Click on **Save & Close**.

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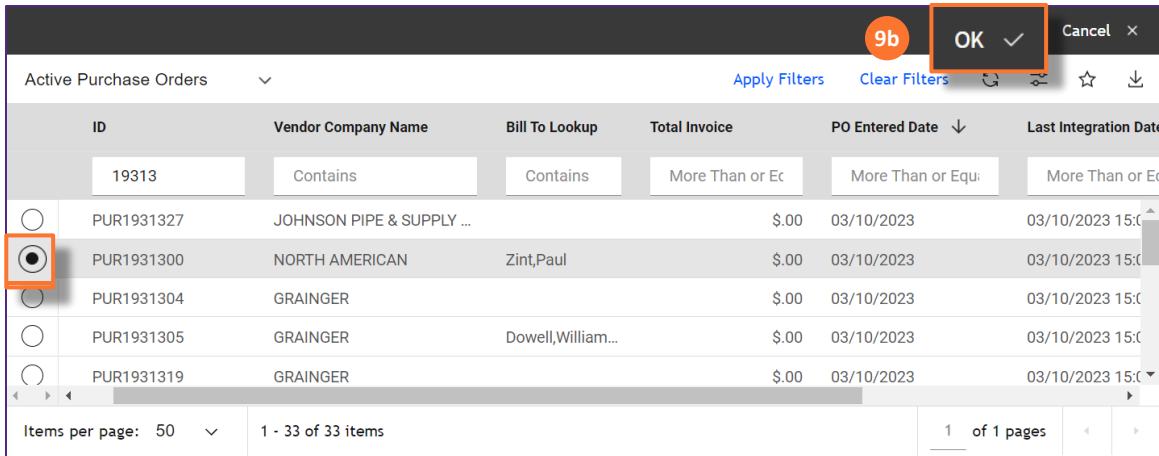
DIRECTIONS:

9

Upon clicking Save & Close, you will return to the **Active Purchase Order** window:

9a Click on the **radio** button next to the purchase order you just edited.

9b Click **OK**. This will update the PO and close the PO window.



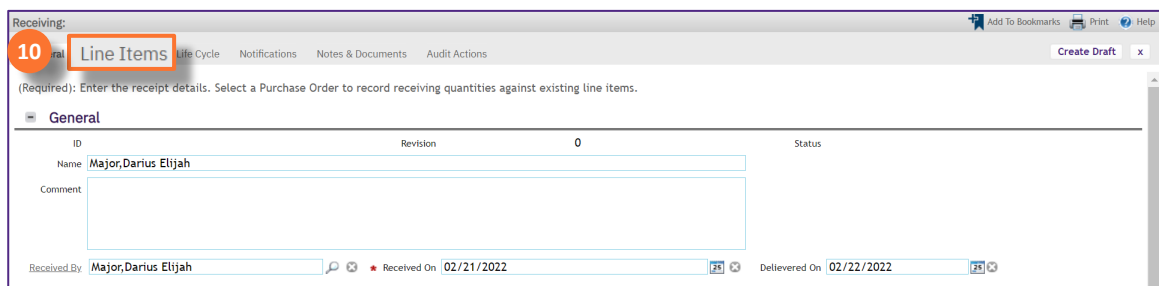
ID	Vendor Company Name	Bill To Lookup	Total Invoice	PO Entered Date	Last Integration Date
19313	Contains	Contains	More Than or Ec	More Than or Equi	More Than or Ec
PUR1931327	JOHNSON PIPE & SUPPLY ...		\$.00	03/10/2023	03/10/2023 15:0
<input checked="" type="radio"/> PUR1931300	NORTH AMERICAN	Zint,Paul	\$.00	03/10/2023	03/10/2023 15:0
<input type="radio"/> PUR1931304	GRAINGER		\$.00	03/10/2023	03/10/2023 15:0
<input type="radio"/> PUR1931305	GRAINGER	Dowell,William...	\$.00	03/10/2023	03/10/2023 15:0
<input type="radio"/> PUR1931319	GRAINGER		\$.00	03/10/2023	03/10/2023 15:0

Items per page: 50 | 1 - 33 of 33 items | 1 of 1 pages

10

Upon clicking, you will return to the **Receiving** window:

10 Click on the **Line Items** tab.



Receiving: **Line Items** Life Cycle Notifications Notes & Documents Audit Actions Create Draft x

(Required): Enter the receipt details. Select a Purchase Order to record receiving quantities against existing line items.

General

ID: _____ Revision: 0 Status: _____

Name: Major,Darius Elijah

Comment: _____

Received By: Major,Darius Elijah Received On: 02/21/2022 Delivered On: 02/22/2022

▼ IMPORTANT

Before moving forward, carefully check that the PO has not already been received. Review the **Previously Received** column **BEFORE** Step 11.

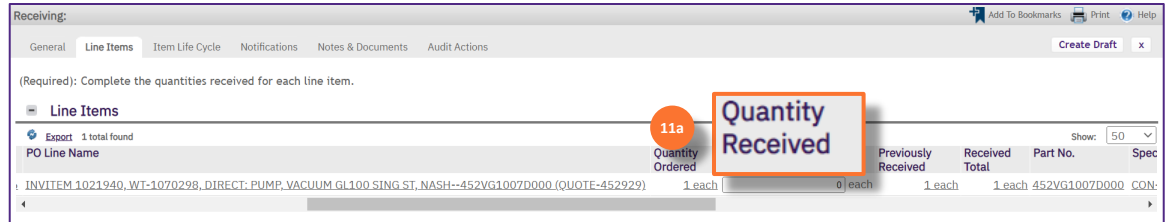


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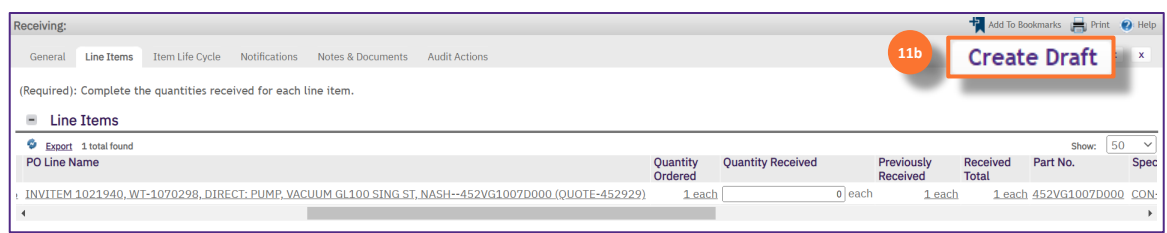
DIRECTIONS:

11 From the **Line Items** tab:

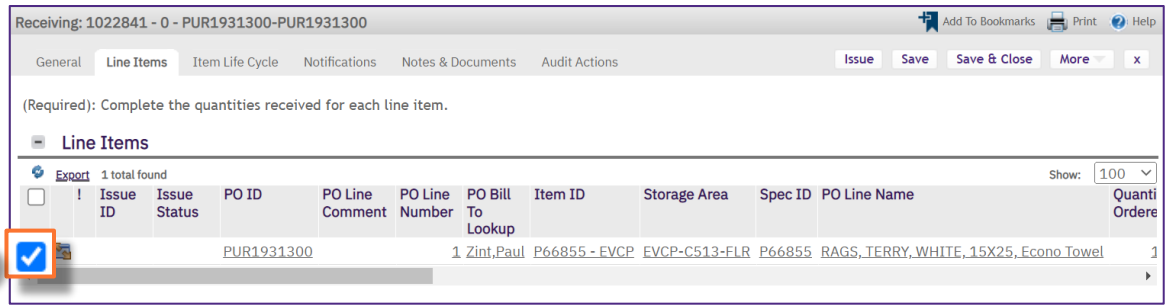
11a Scroll to the right and enter **Quantity Received**.



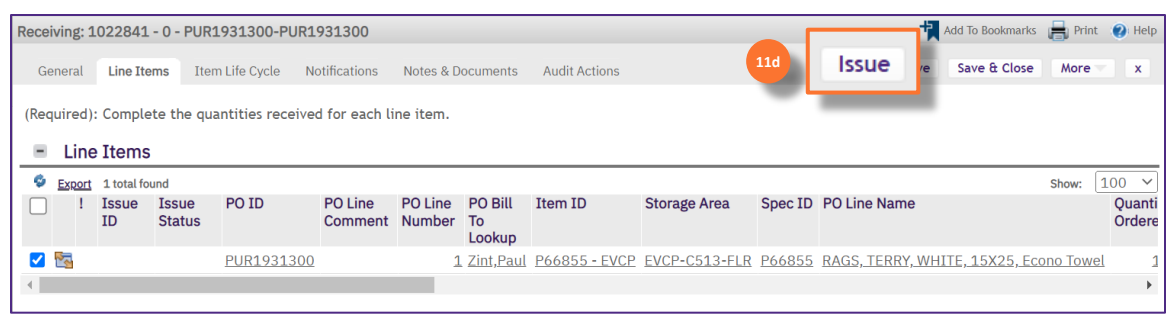
11b Click on **Create Draft**.



11c Click the **checkbox** on the left, only for lines with quantity. **DO NOT** check the box for back-order items.



11d Click on **Issue**.



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DIRECTIONS:

12 Upon clicking Issue, the item will appear in the **Issued Line Items** section:

12a Refresh the window to change the Issue Status from Active to **Posted**.

Receiving: 1028238 - 0 - PUR2024920-PUR2024920

General Line Items Item Life Cycle Notifications Notes & Documents Audit Actions Complete Revise More x

(Required): Complete the quantities received for each line item.

Line Items

Export 1 total found Show: 100

Issue ID	Issue Status	PO ID	PO Line Comment	PO Line Number	PO Bill To Lookup	Item ID	Storage Area	Spec ID	PO Line Name
1310456	Posted	32024920	WT-1358255	1	M Johnson,Christina	INVITEM 1035339	CHCENTRAL-	CON-1046163	INVITEM 1035339 WT-1358255, QUOTE#S00746 DIRECT: LAMP, L COB, 36W, HID1 E26, 40K, 120V, L36CCE26U40K

12b Scroll to the right and confirm the **Total Cost** has been filled in. Use the **Refresh** button if you do not see the Total Cost.

Receiving: 1022841 - 0 - PUR1931300-PUR1931300

General Line Items Item Life Cycle Notifications Notes & Documents Audit Actions Complete Revise More x

Issued Line Items

Apply Filters Clear Filters Refresh

Inventory Item ID	Inventory Item Name	Stock Category	Quantity Issued	Unit Price	Total Cost
66855 - EVCP	P66855 - EVCP: TOWEL, TE...	Stocked	1 each		\$.45

Items per page: 50 1 - 1 of 1 items

Complete Revise More x