eTurns

Receive

Help documentation

Contents
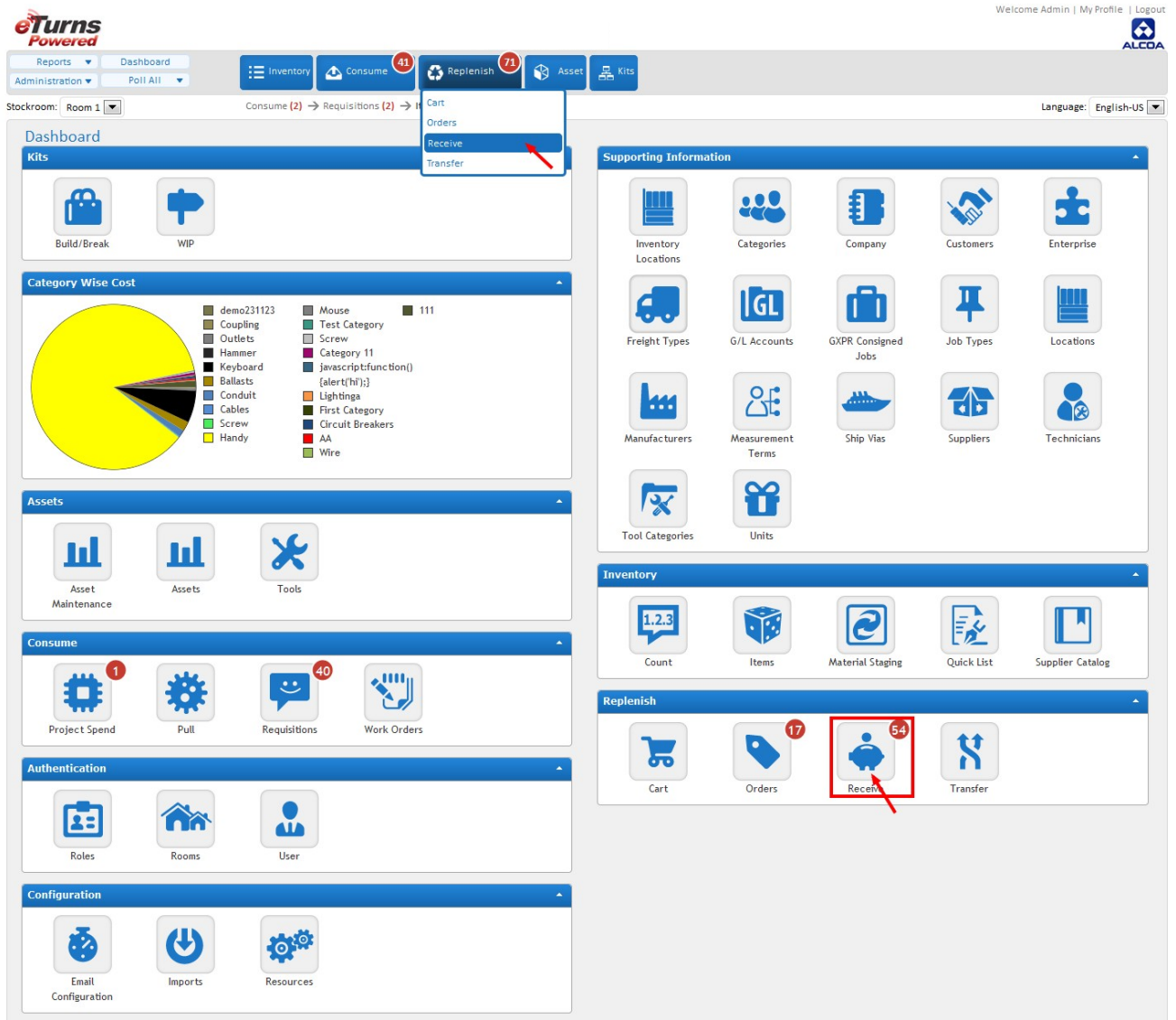
Receive lists all the approved orders which are in Transmitted state; in grouped format for user to check and update the status of various items received from suppliers. When all the items of an order are received the order automatically closes and seizes to be displayed on screen.

Guidelines

a. Open Receive:

To open receive, user may either select Receive from Replenish dropdown or simply click the Receive icon listed under Replenish on Dashboard.
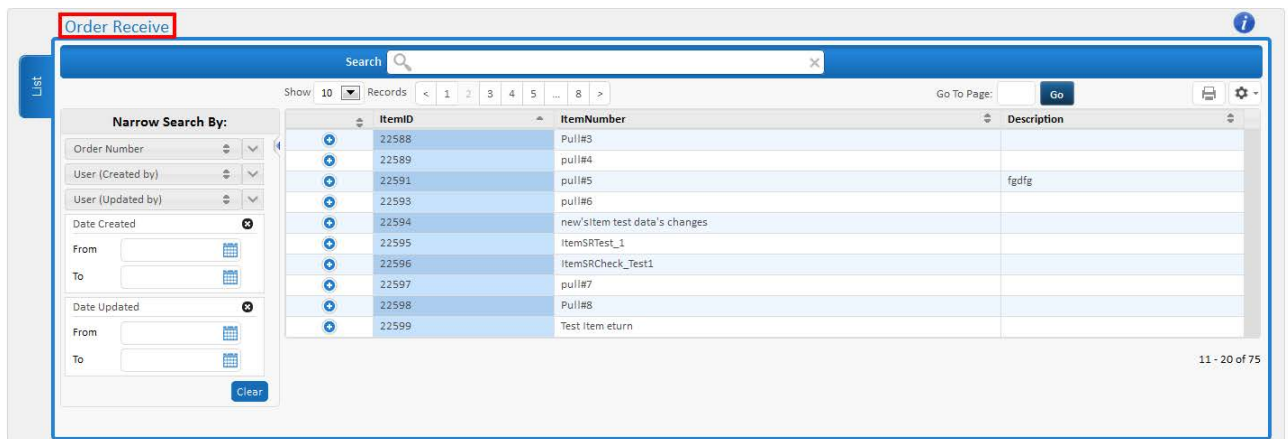

Figure 1

Figure 2

b. Receiving an item for order:

All the items are listed in a grid, with expand/collapse functionality. When user hits ⊕ (Expand) icon, the various receive details (e.g., Receive date, Requested quantity, Received Quantity) of a particular order are displayed. The updating of items received can be divided in two main categories:

1. <u>When Staging name is defined</u>: It implies that the item is directly receivable and already has its Staging name defined at the time of placing the order. The following steps describes to receive an item:

   - Select Order number in which item was ordered from the Order dropdown.
   - Enter the quantity received, in the Enter quantity text box and hit "Receive".
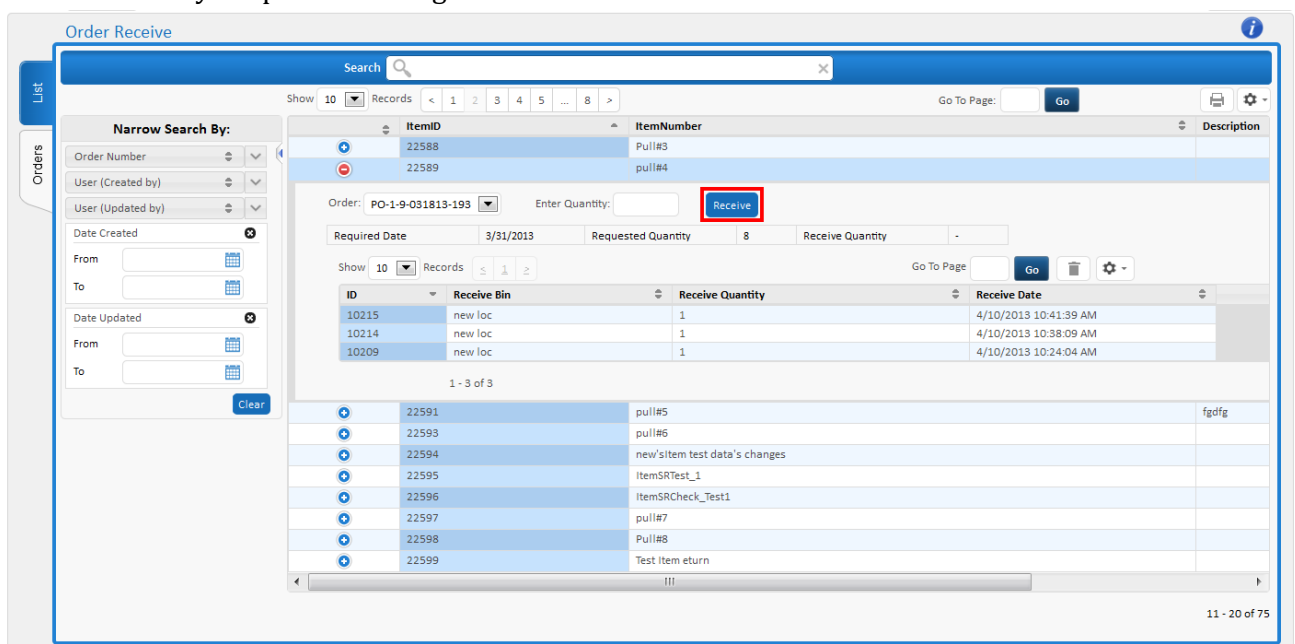   - The entry is updated in the grid below.

Figure 3

2. <u>When Staging name is not defined</u>: It implies that the item does not have a defined inventory location and its location needs to be determined along with receiving an item. The Staging name for that item was not defined at the time of placing the order.
   - Select Order number in which item was ordered from the Order dropdown.
   - Click on "Receive" button and Item locations pop up appears on screen.
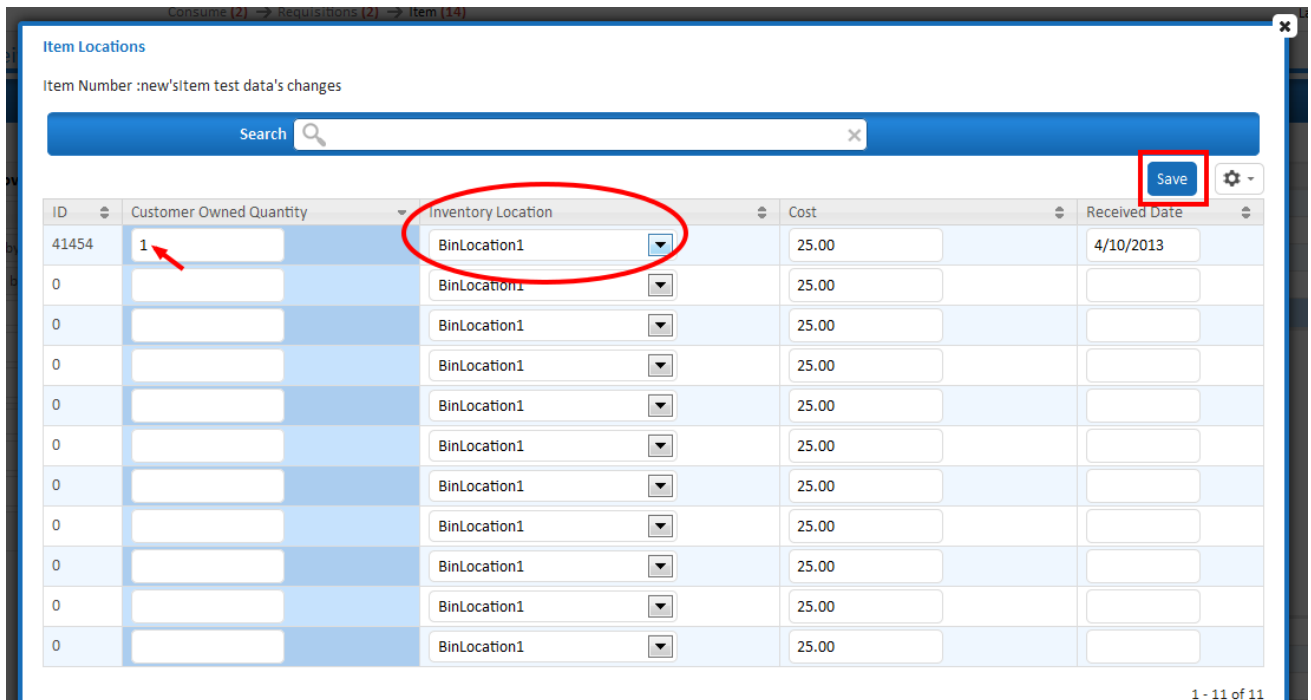

Figure 4

- Enter the quantity in Customer owned Quantity text box, then select Inventory location from the drop down and hit "Save".
- The entry is reflected in the main grid. Thus completing the process.

c. Delete a record:

In expanded mode, select a record to be deleted and then click on Delete icon [🗑] or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected record.
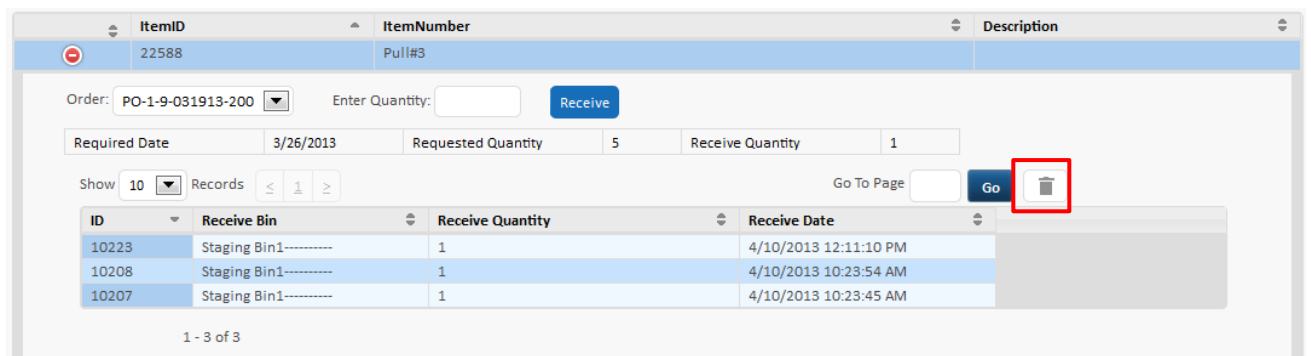

Figure 5

d. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

a) Print: It prints the selected page.
b) Excel: It converts the page to excel sheet.
c) CSV: It converts the page to CSV sheet.
d) PDF: It converts the page to PDF document.
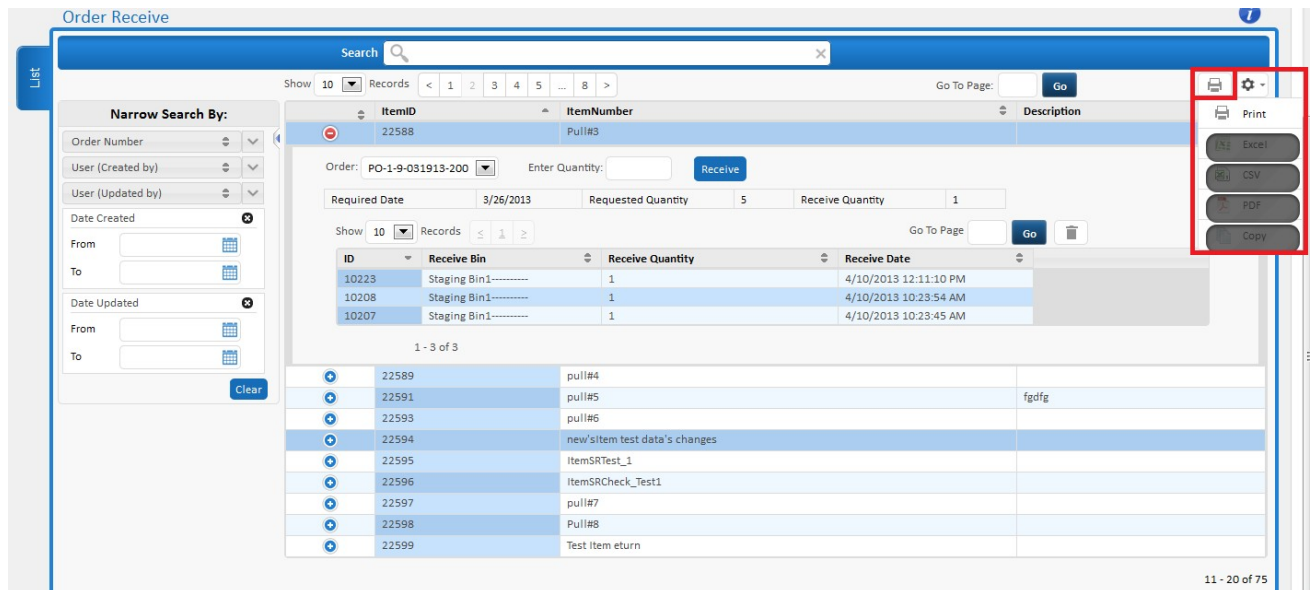e) Copy: It copies the page to Clipboard.

Figure 6

e. View change log:

To view the order status of an item in various order numbers, select the record. A new tab named Orders appears on left side of screen. Click the tab to view the list of all the orders containing the item along with their status information.
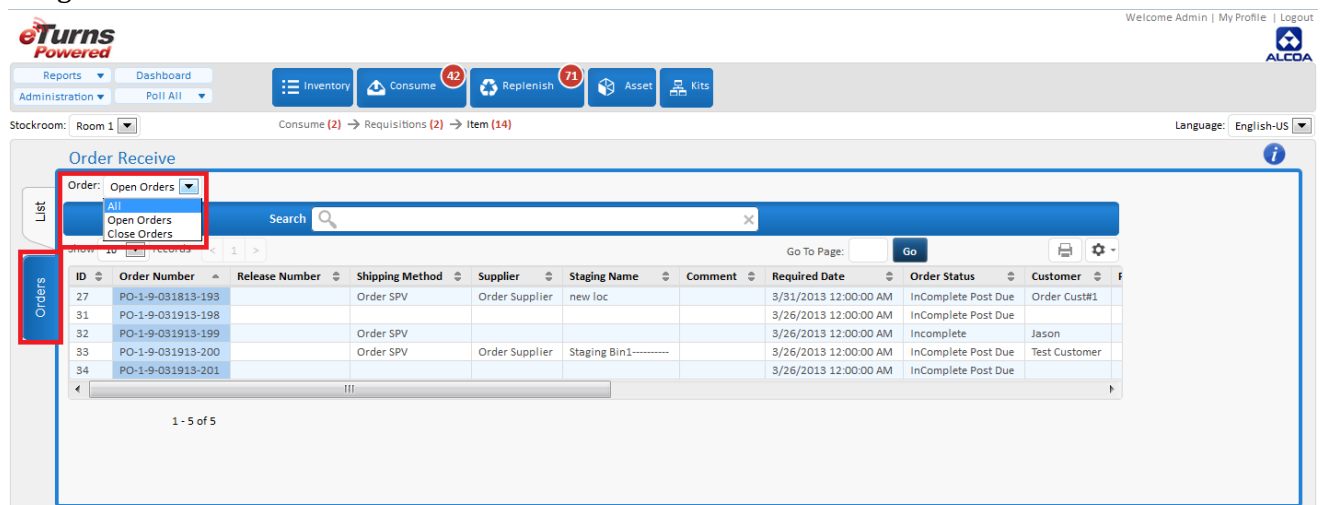

Figure 7

Note:
- User may select type of order to view, e.g., All order, open or closed order from Order drop down.
- The above screen is displayed in View only mode.

f. Search for keyword:
There are two types of search available to look for any keyword or filter the content of the module:

i. <u>Main Search</u>: To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.
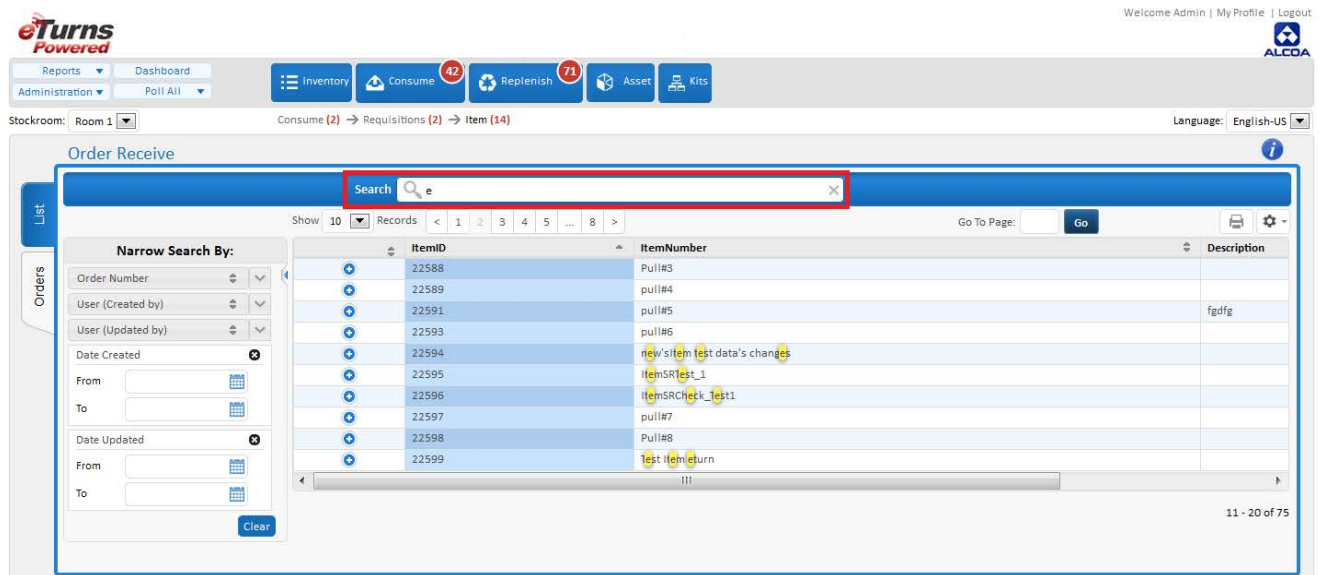
ii. <u>Narrow Search by</u>: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
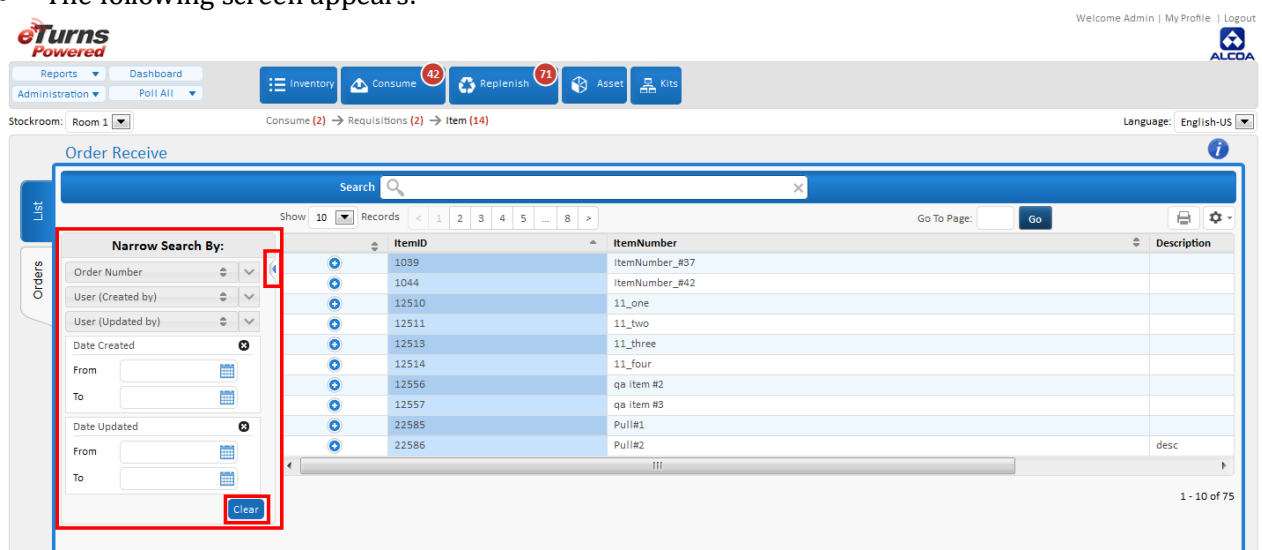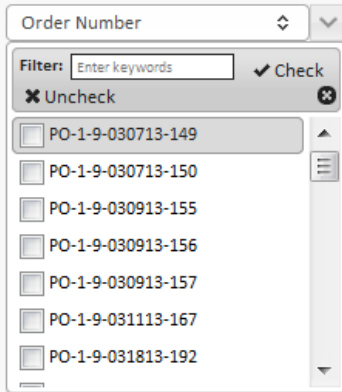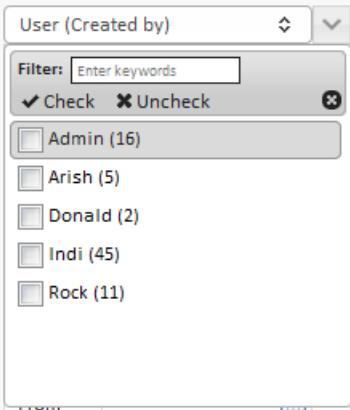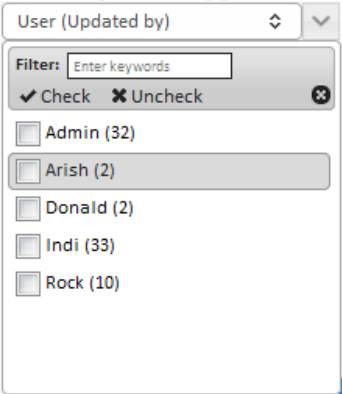- The following screen appears:

Field	Description
Order Number	It is used to filter the module for the 'Order number field'. Click on up-down arrow key. Dropdown appears: User can select or unselect the order numbers of the item using Check or Uncheck button. The module reflects the filter selections made.
User Created by	It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears: User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.
User Updated by	It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears: Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. **Note:** To cancel the selections made at any point of time, click .

Date Created and Date Updated	They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.
	Note: To clear the entire selection, click [Clear]

Note: At point of time only one of the either searches will work.

g. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click "Go".

Figure 10

Note: This functionality is available at main as well as individual item level.

h. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

a) Refresh: This option refreshes the module and displays the latest changes implemented.
b) Auto Refresh: This option automatically refreshes the screen in specified time.
c) Reorder: This option enables user to reorder the columns of the module.
   - User can also select which field to appear on screen and which remains to be hidden.
   - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
   - User may also drag and drop fields to be arranged in order of choice.
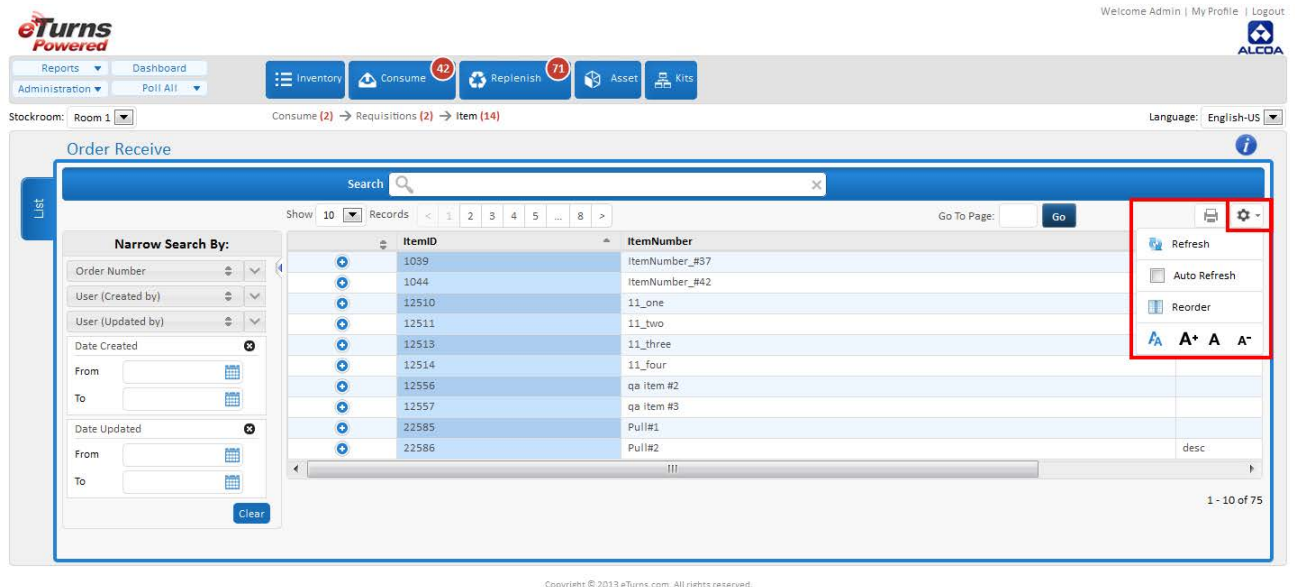   - After the selection is completed, click "Reorder".

Figure 11

i. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

1) Resizing of columns
2) Re-ordering of columns using drag & drop of column header
3) Single column and multi column sorting (using shift key)
4) In-line editing

Multi selection of rows by clicking each row