Receive

Client Users Guide

Version 2.6.7

This document is intended for use
By End users and Functional Managers

501 Kings Hwy, Fairfield, CT 068525 Phone: (888) 647-4721 Fax: (866) 714-2857

Change Record

Date	Author	Version	Change Reference
6/30/2008	D. Baxter	2.6.5.0	Initial Version Release
12/8/2009	R.Hatt	2.6.5	SP12
1/15/2011	R.Hatt	2.6.6	New Version Release
10/19/2012	R.Hatt	2.6.6	SP6
4/30/2013	R.Hatt	2.6.7	New Version Release

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Table of Contents

501 Kings Hwy, Fairfield, CT 068525 Phone: (888) 647-4721 Fax: (866) 714-2857

AtPar Login Screen

The @Par Hand Held Terminal (HHT) device login screen can be accessed when users are set up by their @Par Administrator or Supervisor. @Par Version information is displayed on the login screen. The Remember Me checkbox will retain the user id information of the user who last used the HHT. This will require only the entry of the password for that user.

The keyboard should appear automatically upon access to this screen. This allows users' easy access to type in their information. If the keyboard doesn't appear tap the icon in the bottom center of the login screen.

Enter your **Login Name** and **Password** and ***TAP*** the Login button **Figure 1**.

Figure 1

AtPar Apps Screen

Based on the applications assigned to the client user by the administrator or supervisor the screen below appears for access to an @Par product or products **Figure 2**

Figure 2

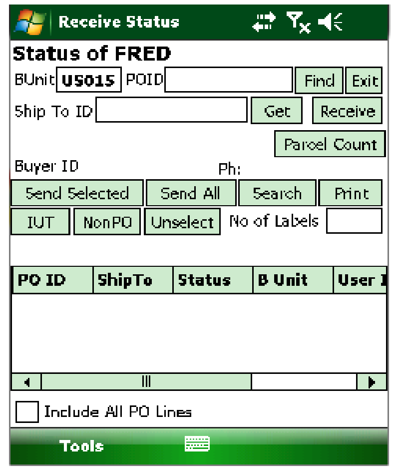

Figure 3

Upon successful login if the user only has access to the **@Par Receive** they will move automatically to the **Receive Status** screen, shown in **Figure 3*.*** If the user has more than one **@Par** product the icons will appear in **Figure 2** for user to choose which application to use.

The **Receive Status** screen is the main screen and is used to download POs and items as well as send data to the ERP server upon completion of counts.

The actual counting is done on the **Receive Items** screen. This will be explained later in the document.

To get started ***TAP*** the **Receive** icon. This will launch the module and you will see the **Receive Status** screen which is the primary application screen ***Figure 3***.

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Receive buttons and fields explanations

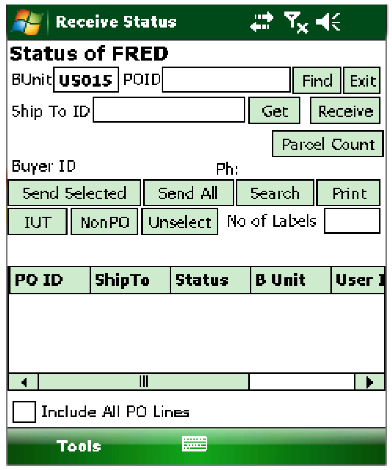

Figure 4

Refer to Figure 4

B Unit – Business Unit to receive items from

PO ID – The Purchase Order ID is used with the Find button or the Get button. ***Enter*** the PO ID manually or by scanning the PO ID bar code label (if available) and ***click*** the desired button.

Find **–** If a PO has been downloaded to the HHT entering the **PO ID and *TAPPING*** this button, the PO ID will appear, ***highlighted***. If the PO ID that was entered is **not** downloaded to the HHT the Please get the data message appears

Exit - This option will exit the Receive Application.

Ship To ID – The **Ship To ID** field is the location that the **PO** and items are received. This may be a mandatory field, depending on how the supervisor set the parameters for the user's group. If the following profile parameter is checked

ShipTo ID required for download	☑	[Checking this will force the user to enter/select the ShipTo ID]

…..it is recommended to have this profile parameter checked also.

Editable ShipTo ID field	☑	[Checking this will allow user to edit/select the ShipTo ID]

The Ship To ID field is warehouse or storeroom where the PO is received. This is an optional field if the aforementioned parameter is unchecked.

Invoice#/Pack Slip – The Invoice number or packing slip field may or may not appear on the HHT. If the organization receives ASN receipts the following org group parameter may be checked by the Supervisor.

ASN/ASR Receipt by InvoiceNo or PackSlipNo	◉ Invoice No ○ Pack Slip No ○ None	[Based on the selected option,either Invoice No or Pack Slip No will be activated on the HHT for the user to enter for download of ASN/ASR Receipts]

Figure 5 displays if Invoice No is checked and Figure 6 displays if Pack Slip No is checked. If one is checked it is required to capture the value on the HHT when receiving ASN packages.

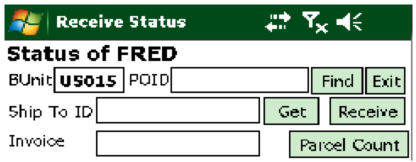

Figure 5

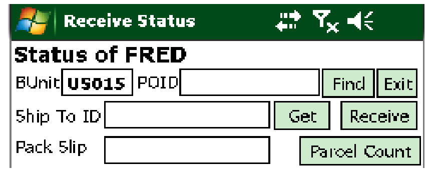

Figure 6

If **None** is selected the screen in **Figure 4** will appear on the HHT.

Get **-** This option is used to download the **PO ID** from the ERP system. If a user ***TAPS*** on this button and either a **PO ID** or **BUnit** is not entered following message appears **Figure 7**

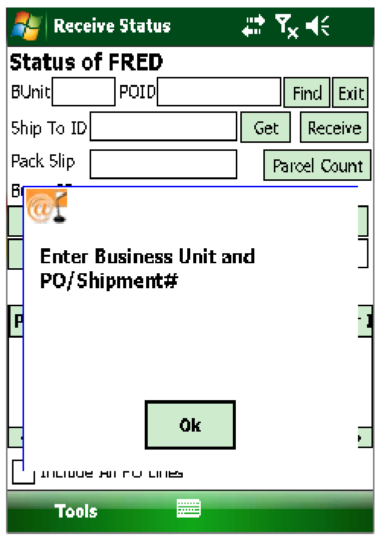

Figure 7

Receive **–** Once the user is ready to receive a PO, they will ***highlight*** that PO and ***TAP*** on this option.

There are 3 methods of selecting a **PO** on this screen if a bar code label is not available.

- ***TAP*** to highlight a **PO ID** that is visible on the HHT List View or Grid
- Use the **UP/DOWN** scroll bar on the right hand side of the screen and find and highlight the **PO ID** and ***TAP*** on it
- Type in the **PO ID** in the upper section of the window and ***TAP*** the Find button**

If the PO is downloaded to the HHT, **Find will display the information. If not previously downloaded, ***TAP*** the Get button to download the PO

If bar codes are available simply ***scan*** the PO ID bar code label and if the PO is downloaded to the HHT it will appear on your screen.

- If it does not find the PO, ***TAP*** Get to download it to the HHT
- It will also be highlighted so the user can ***TAP*** the Receive button to receive the PO

Buyer ID – If the ERP system supports this, the Buyer ID will appear in this field, eliminating the need to search for the information in your ERP system.

NOTE: The Buyer ID is not displayed until the PO is in Download status.

Ph: – If the ERP system supports this, the Buyer's phone number will appear in this field, eliminating the need to search for this information.

NOTE: The Buyer's phone number is not displayed until the PO is in Download status.

IUT **-** This button enables a user to receive items transferred from one inventory location to another. (Transfer replenishment – Inventory Unit Transfer) This button will only appear if the following profile parameter is ***checked*** **Inter Unit** or **Both**

Purchasing/Inter Unit Receiving	○ Purchasing ○ Inter Unit ◉ Both	[Based on the selected type, Purchasing and/or Inter Unit orders should be allowed to receive.]

Send Selected **-** This option is used to upload or move a single Received PO to the ERP Production server. Ensure a PO has been received and in **RECEIVED** status***.*** ***Highlight*** the PO and ***TAP*** this button.

Send All **-** This option is similar to the **Send Selected** option. The difference is that this option will send **All PO**s on the HHT that have a **RECEIVED** status without requiring user to highlight a specific record.

There are 2 statuses that can be displayed:

- **DOWNLOAD –** Signifies that the **PO** has been downloaded from the main production server to the HHT and is ready to be received.
- **RECEIVED –** Indicates items have been counted completely or partially for on this **PO**

If the following profile parameter is checked, the data for NON PO items will also be sent to the @Par database immediately. This is contingent on your organization being in a wireless environment

Realtime upload of Non PO item receipts to server	☑	[Checking this will upload the Non PO receive event information to server if network connection is available]

Search **-** This option will search for ALL **PO**s and give the user a **Search POs** screen in **Figure 8**

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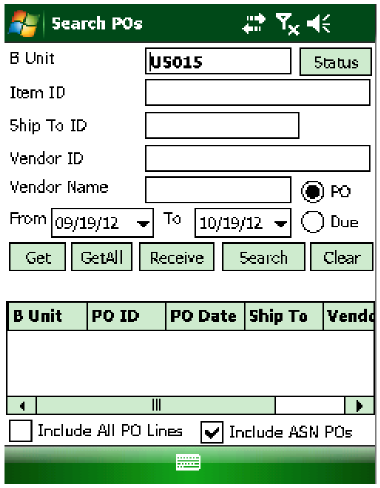


Figure 8

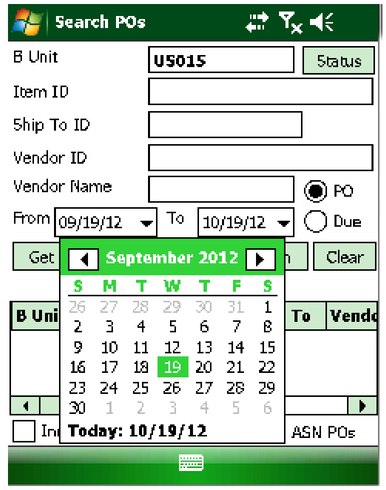


Figure 9

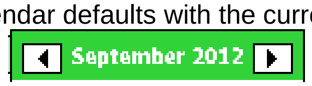
Supervisors will use the following org group parameter to set the PO Date or Due Date search option. This is a default and user can change the option on the **Search POs** screen.

Search POs by PO creation or Due date	◉ PO DATE ○ DUE DATE	[Purchase Orders will be searched based on selected date, options are PO create or Due date.]

If the following profile parameter is checked the **"Include ASN POs"** checkbox on the bottom right hand side of the HHT as in **Figure 8** will be checked. If unchecked the checkbox is unchecked but can be manually checked by the HHT user to search for ASN POs

Search ASN POs	☐	[Checking this will search for ASN POs along with regular ones.]

To change the search date TAP the arrow next to the From or To Date field and **Figure 9** appears

The calendar defaults with the current month but user can move easily to different months by using the 

arrows. To change the year ***TAP*** on the year and up and down arrows 

appear. User can now modify the year of the search as well.

If the user attempts to search **without** the Business Unit/Company or "**From** and **To"** dates, the following message appears **Figure 10**

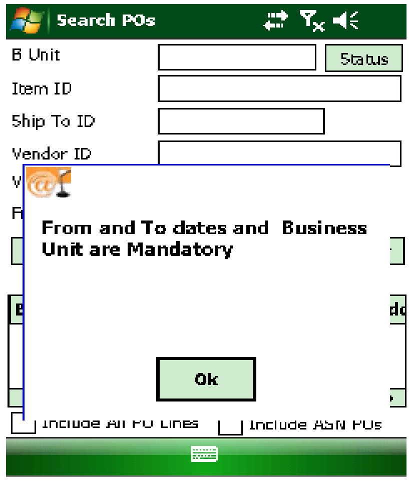


Figure 10

TAP the Ok button to enter the required information and continue searching.

NOTE: If the Default ShipTo ID and Default Business Unit options have been entered in User Parameters by the supervisor as seen below, this information will automatically appear when moving to the **Search POs** screen.

Default Business Unit	US015	[The Default Business Unit displayed on the HHT]
Default ShipTo ID for Receiving	US001	[Default ship to location where the items will be received]

If the editable **ShipTo ID** field in profile parameters has also been checked, the user will be able to edit the field on the HHT. If unchecked the field can't be edited and will display grayed out on the HHT.

Editable ShipTo ID field	☑	[Checking this will allow user to edit/select the ShipTo ID]

Users can search for a **PO** based on **Business Unit, Item ID, Ship To ID, Vendor ID, Vendor Name, Date Range,** or a combination of any these.

The downloaded list from the search will provide header information only for any **PO** found. To download the items on the **PO** ensure the **PO** is ***highlighted*** and ***click*** the Get button. This will download the items for the selected **PO** and change the display status on the **Receive Status** screen to **Download.**

Click the GetAll button so that all items will download for each PO Header on the search screen. This is ideal for an organization that doesn't have wireless network available. The user can use the GetAll button to get all information downloaded while docked in the cradle, and then take the HHT out of the cradle to go and receive all **POs**.

The Receive button can also be used to download the items to the PO from the search screen. ***Highlight*** the PO and ***click*** this button. The items download and the HHT will move to the **Receive Items** screen automatically to begin receiving.

Print – ** Allows barcode label printing for this **PO.

NOTE: Using the print option from the **Receive Status** screen will print a receipt deliver label for use with the **@Par Deliver** product. Printing from the **Receive Items** screen will print a putaway label which is used by the **@Par Putaway** product.

**NonPO – ** If the profile parameter below is checked this button will appear.

Non PO Items Receive	☑	[Checking this will allow receiving of Non PO items on HHT]

If the parameter is unchecked the user will not be able to receive a NON PO package/item and the button will be disabled on the HHT.

No of Labels – *Enter* the number of labels to print. Using this option with print same label information for the same package but will identify on the label by 1 of 5, 2 of 5, 3 of 5, etc.

Include all PO Lines – If this checkbox is checked, all PO Lines previously received with the exceptions will display all previously received lines.

- For example, a PO with 5 items is received on Monday.
- 4 of the items are received in full, the 5th item is backordered.
- User sends this information to the ERP system.
- On Tuesday the vendor ships the 5th item.
- When the user downloads the information all 5 items will display on the HHT **Receive Items** screen. The previously received items will display the received quantity.

If this option is unchecked, only the 5th item that was backordered will appear on the HHT to receive.

NOTE: As in all other @Par products, the HHT columns in the grid or LV (the bottom portion of the screen) can be sorted. This ability is driven by the profile parameter setting below

Sort By Column	☑	[Checking this will allow the user to sort the columns on the HHT]

If checked the user has the ability to sort by any column in the grid by ***tapping*** on the column header.

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How to Receive POs

Standard Workflow

The standard work flow for receiving POs in @Par Receive is:

1. Login to HHT
2. Get to Receive Status screen
3. Download an open or partial PO to HHT
4. Go to Receive Items screen
5. Receive items from PO or Packing Slip
6. Print delivery labels
7. Send data to the ERP system

Get PO data to hand held

There are three methods that can be used to get POs to the HHT

- Entering PO ID manually
- Scan PO ID bar code label (*this is used rarely as Vendors don't bar code their packing slips)
- Search

From the **Receive Status** screen ***TAP*** in the **PO ID** field. The keyboard should appear at the bottom of the screen.

NOTE: The BUnit field is **mandatory**. Best practice is to have the supervisor set up a Default Business Unit as mentioned earlier in this document.

If a user clicks the Receive **button** entering the PO ID the following message appears **Figure 11**

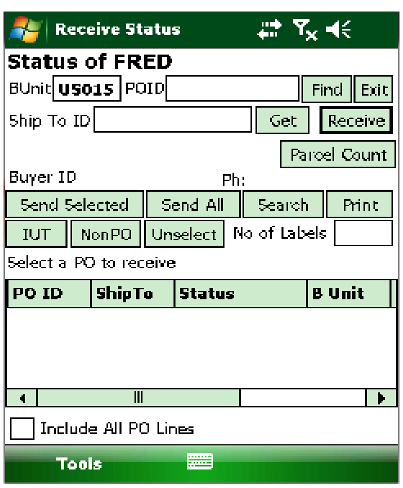


Figure 11

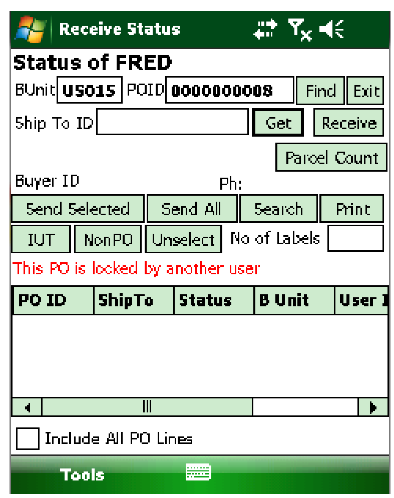
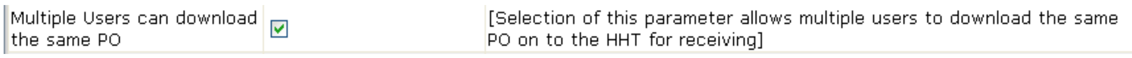


Figure 12

Type the **PO ID** number in and ***TAP*** the Get button. The message in **Figure 12** may appear:

If the profile parameter below is unchecked POs may get locked.



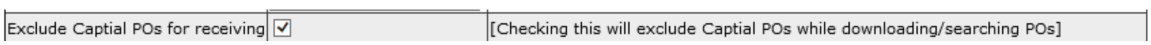
The supervisor has two options:

1. Physically locate the other user that has the PO downloaded and remove it from their HHT
2. Use the Release Orders function from the @Par Web pages to unlock the PO for download

If the parameter is checked the lock message will never appear.

Best practice is to keep the parameter unchecked. If multiple users are able to download the same PO there is potential for duplicating receipt of packages

If the following org group parameter is checked, it will exclude **Capital POs** from being downloaded or searched.



Once a valid PO to the HHT it will appear with a status of **DOWNLOAD Figure 13**

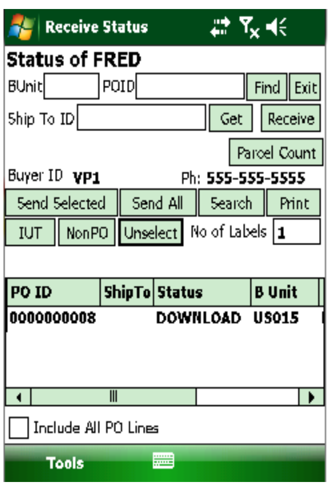


Figure 13

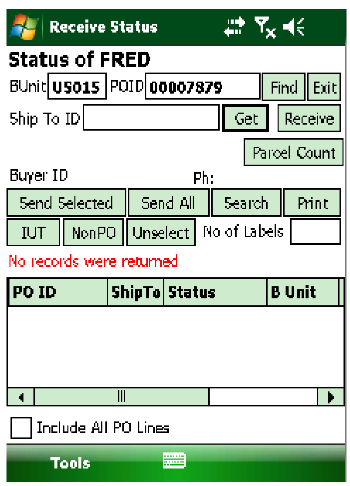


Figure 14

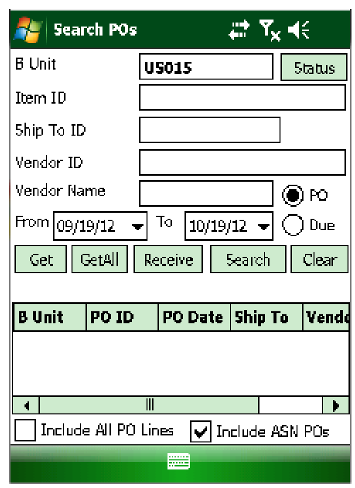


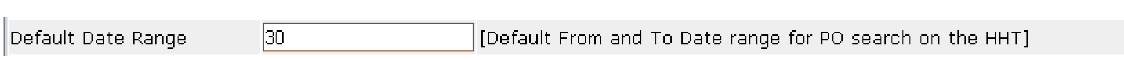
Figure 15

If the PO still does not appear, this means the system does not recognize the PO ID in that associated BUnit and the message **"No records were returned"** will appear, shown in **Figure 14.**

The user should check PO# and Business Unit are correct.

TAP the Search button and the user can search for the item or PO **Figure 15**

The following profile parameter triggers the default date range of the search screen



The date range will always default to the date range set up in this parameter, but is editable.

User can use the Clear button to clear the data in the search criteria if another search is required.

The number of records that will be displayed during a search is determined by the value entered in the following org group parameter by the @Par Administrator

Max Number of Records to download	20	[Number of records downloaded in the PO search screen on HHT for the given criteria (Latest POs will get priority)]

Search fields available are **Business Unit, Item ID, Ship To ID, Vendor ID, Vendor Name, Date Range,** or a combination of any of the above.

If the PO is found on the search screen this is the header information only for the **PO.**

To download the items ensure the **PO** is highlighted and ***click*** the Receive button which will move the user automatically to the Receive Items screen for fast access to receive item/s in

At any time, if a user downloads the incorrect PO the delete option can be used to remove it from the HHT

Highlight the PO to delete and ***TAP*** the **Tools** option on the bottom left of the HHT as shown in **Figure 16**

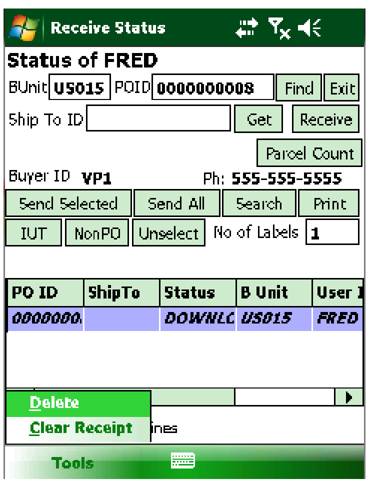


Figure 15

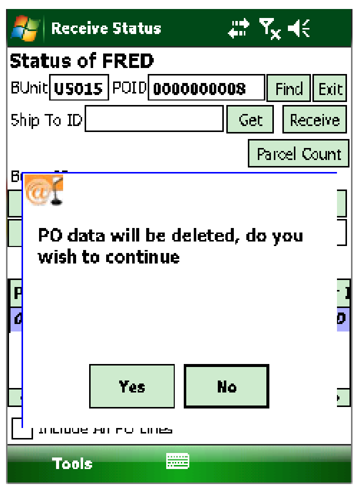


Figure 16

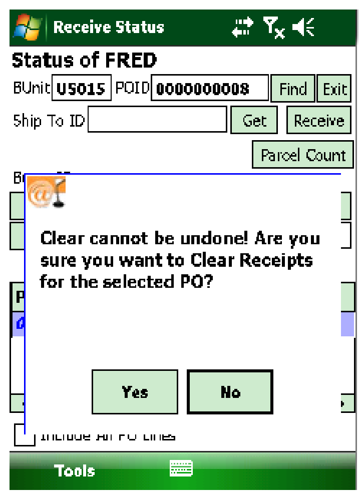


Figure 17

TAP the **Delete** option and the message appears **Figure 16**.

TAP the Yes button and the PO will be deleted from the HHT device. It will still be available from the ERP system to be downloaded and received in the future.

TAP the No button and return to the **Receive Status** screen. The PO will remain in **Download** status***.***

To clear the counts on a PO without deleting use the **Clear Receipt** from the **Tools** option **Figure15**

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Highlight a PO on the HHT that is in **RECEIVED** status and **TAP** the **Clear Receipts** option **Figure 17**

TAP the Yes button and the receive items count will be removed from the HHT device and automatically changes the status for the PO to **DOWNLOAD**. The user will have to receive the items on the PO again.

TAP the No button and return to the **Receive Status** screen. The PO will remain in **RECEIVED** status***.***

Receive Items

Highlight a PO in **DOWNLOAD** status **Figure 18**

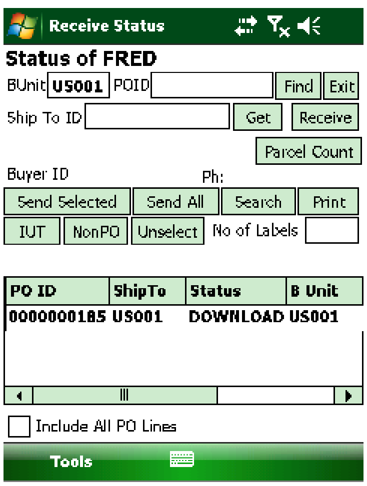

Figure 18

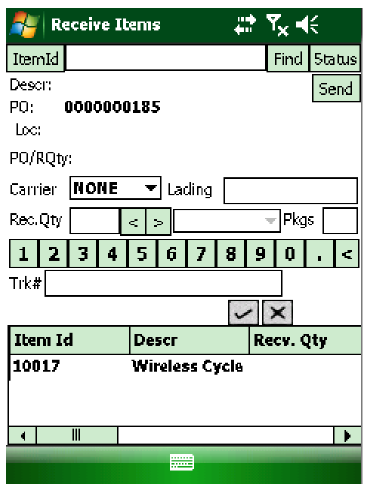

Figure 19

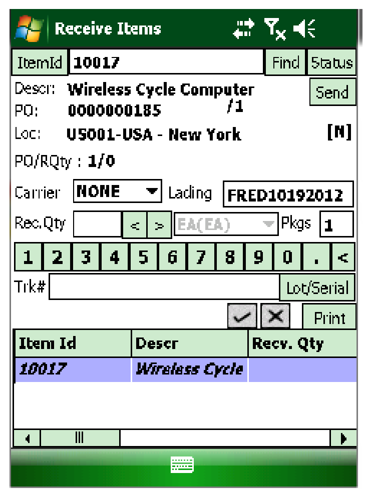

Figure 20

TAP the Receive button Figure 19

The **Receive Items** screen will display on the **PO ID** in the details section. Once an item is selected the details will display **Figure 20*.***

Note for PeopleSoft ERP users: If a zero amount is entered in the Rec. Qty field, this will cause an error message while processing in PeopleSoft. Users **MUST** leave this field blank if the item is backordered. If the following profile parameter has been checked an alert message to the user appears **Figure 21**

Zero Receipt Warning Message	☑	[Selection of this parameter will give a warning message to the Hand Held User when they enter zero as the receipt quantity]

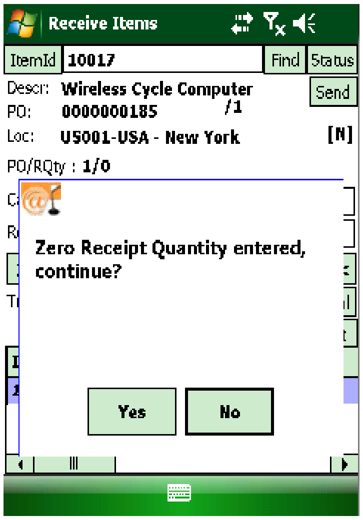

Figure 21

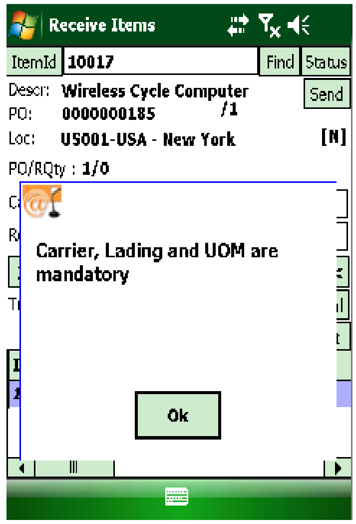

Figure 22

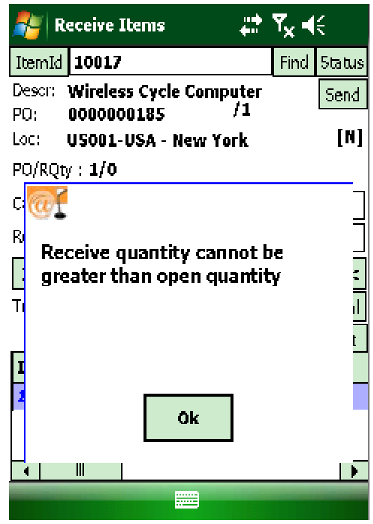

Figure 23

Click the [Yes] button to continue counting and accept the 0 rec quantity or ***click*** the [No] button to return to the **Receive Items** screen to edit the 0 rec quantity.

The [Print] button from the **Receive Items** screen is used to print Putaway bar code labels for stock/inventory items.

Labels printed from the **Receive Status** screen print labels to be used by the **@Par Deliver** product.

If the organization uses the **@Par Deliver** product, the following org group parameter **must** be checked

Storage of Non Stock item Info for Delivery	☑	[Checking this will store received Non Stock item Information in @Par after uploading to ERP for Delivery]

NOTE: The **[N]** in the detail section in **Figure 21** signifies this item is NON STOCK or non-inventory. Stock items will display a **[Y]**.

If a user attempts to enter a receive quantity amount without the required fields completed the screen in **Figure 22** appears. Carrier, Lading, and UOM are required to be filled in before adding the received quantity amount.

NOTE: The supervisor can set a default carrier in User Parameters that will automatically display in the Carried field. This is efficient for HHT users that receive most packages from same carrier.

If the following profile parameter is unchecked the message in **Figure 23** displays when a user enters a receive quantity greater than the order quantity

Allows Receive Qty > Open PO Qty	☐	[Checking this will allow users to enter unlimited receive quantity. Un checking this will allow users to enter receive quantity within receiving tolerances]

Users may have ability to select an alternate UOM while receiving items. If the following profile parameter is checked user can change the UOM on the **Receive Items** screen **Figure 24**

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Edit/Select Receiving UOM on the HHT	☑	[Selection of this parameter allows you user to edit/select the UOM value on the HHT]

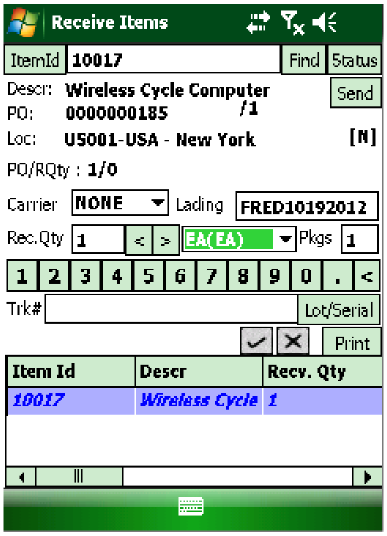

Figure 27

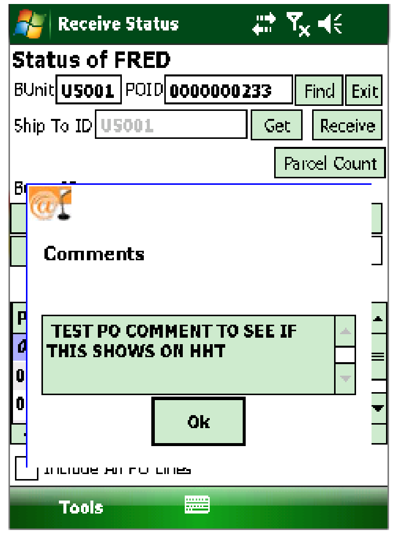

Figure 28

The UOM field changes from a non-editable field do an editable field allowing users to enter an alternative UOM while receiving item.

When receiving items if finished for the PO the user will have two options:

1. ***TAP*** the Status button to return to the **Receive Status** screen displaying the PO in **RECEIVED** status.
2. ***TAP*** the Send button to send items to the ERP system directly from the Receive Items screen

VERY IMPORTANT NOTE: If users select option #2 the PO will be sent and removed from the hand held device. If this happens and it is a package to be used by **@Par Deliver** the label required by the delivery staff will not be available for scanning. Best practice is to **ALWAYS** have users select option #1 above

When the user is moved to the **Receive Status** screen the PO that was just received in should be highlighted automatically.

TAP the Print button to print a bar code label to affix to the package.

NOTE: If PO comments are attached to a PO they will appear on the HHT if the following profile parameter is checked

Display PO comments on the HHT	☑	[Selection of this parameter will display PO comments on the HHT as a popup message]

With the parameter checked when a user attempts receiving the PO screen will appear as shown in **Figure 28** above

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NOTE: If the following profile parameter is unchecked the HHT will not be able to see the order quantity for an item. They will be forced to do a blind count, which is Best Practice and highly recommended.

Display order / received quantity value	☑	[Checking this will display order / received quantity for an item to be received. Un checking will allow users to do blind receiving]

Sending Received Items

The last step in receiving a **PO** is to send the data to the ERP server.

TAP the Send All button to send all PO and items with **RECEIVED** status to the ERP system.

The other process to send information to the ERP system is to ***highlight*** a single PO in **RECEIVED Status** and ***TAP*** the Send Selected button.

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Receive by Exception using Default Input

If the following profile parameter is checked by the supervisor the ability for a user to receive by exception is available

Default Input ☑ [Checking this will default the Open Qty as Receipt Qty for an item]

When checked, this option will display two additional buttons on the HHT:

This functionality is highly recommended. Using the Default Input options a user can receive a 500 line PO in a matter of seconds/minutes.

For example, a **PO** that has 500 line items has been downloaded to a user's HHT. Most of the **REC QTY** counts or amounts will be the same as the ordered amount and the user wants to count only exceptions from the packing slip/list.

The user can ***click*** on the button. This will move all line items from the **Order Qty** field to populate the **Recv Qty field.**

The user only has to modify those items that are not received in full from the packing slip.

If the user wants to clear all counts from the **Receive Items** screen they ***click*** on the button.

This eliminates the need for users to manually enter the **REC QTY** on all line item records.

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Receiving Scheduled Items Workflow

For those organizations that use Scheduled items on their Purchase Orders, **@Par** will receive them as they were placed on the **PO**

Get a PO as usual by highlighting the PO ID in **Figure 29** and then ***click*** on the Receive button

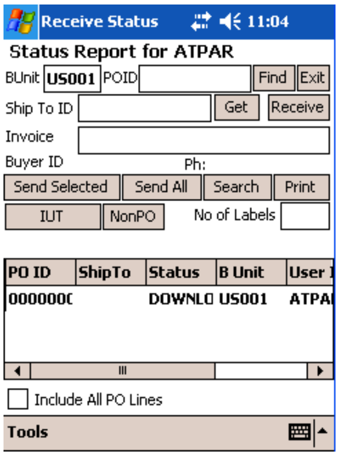

Figure 29

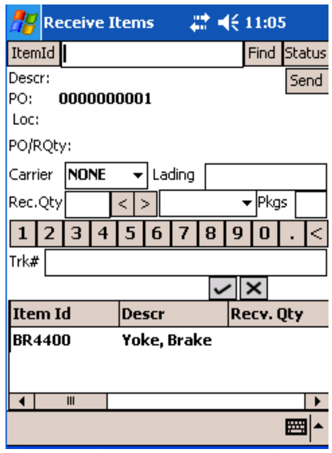

Figure 30

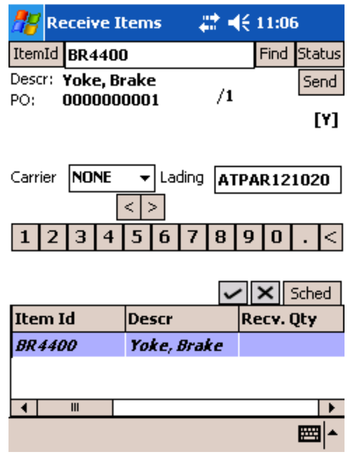

Figure 31

The HHT should display **Figure 30**. Either scan, enter, or highlight the Item ID and the item is on a multiline scheduled PO, you should see the screen in **Figure 31**

TAP the Sched button and **Figure 32** should display on the HHT

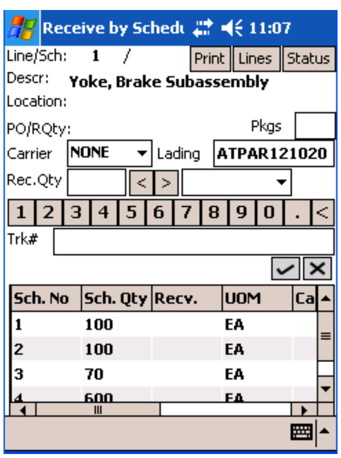

Figure 32

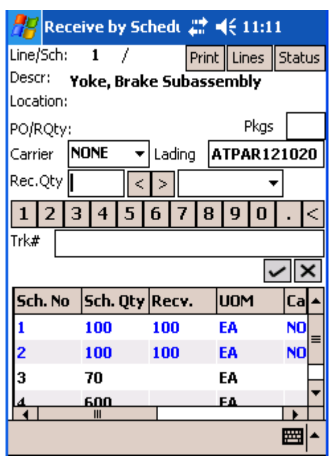

Figure 33

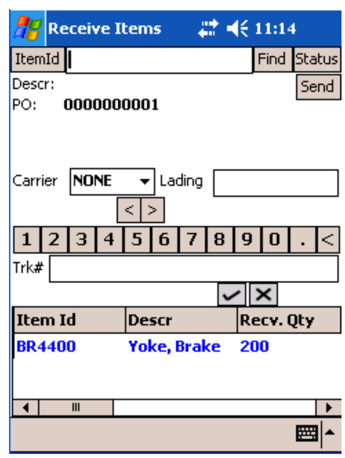

Figure 34

Highlight the Sch. No (Line number) to receive and enter the quantity. You will see the line items change color to **BLUE** as in **Figure 33**

TAP either the Send button to move information to the ERP system or ***TAP*** the Lines button to return to the Receive Items screen in **Figure 34**

Continue receiving other items, ***TAP*** the Send button to move data to ERP system, or ***TAP*** the

Status button to return to the Receive Status screen.

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How to Receive NON POs

In both **@Par Receive** and **@Par Deliver** products users may have the ability to receive a Non Purchase Order (NON PO). The supervisor will need to check the following profile parameter

Non PO Items Receive	☑	Checking this will allow receiving of Non PO items on HHT]

If the parameter is checked the NonPO button is available on the **Receive Status** screen **Figure 35.**

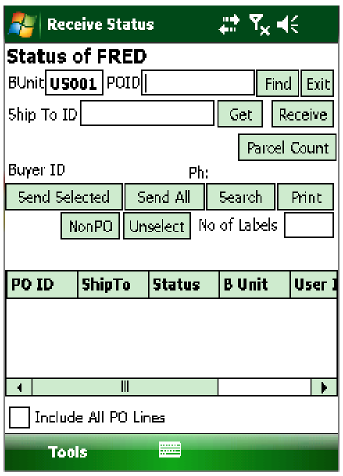


Figure 35

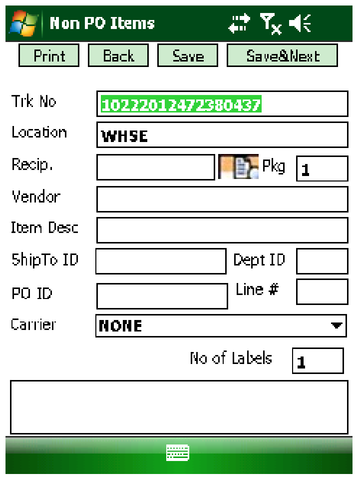


Figure 36

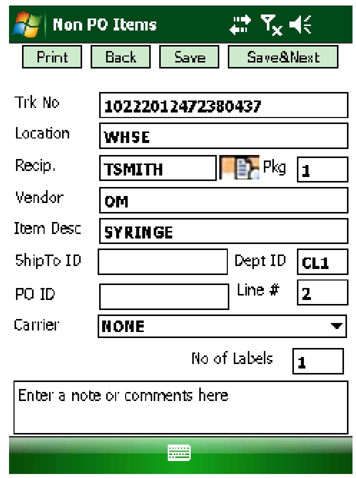


Figure 37

From the screen in **Figure 35** the user has the ability to Receive **PO** items, but also has the ability to Receive **NON PO** items.

TAP the NonPO button and the **Non PO Items** screen opens as shown in **Figure 36.**

MANDATORY FIELDS INCLUDE: Trk No. and ShipTo ID fields. Information **MUST** be entered in the fields before continuing to receive the item/s.

Trk No. – This will default with a system generated tracking number. If there is a tracking number on the package/item, the user can scan it here and overwrite the existing number. The tracking number will print on the label for deliver staff to use.

Location – If you are using this option to deliver, you **MUST** enter a Deliver to Location in this field.

Recip. – Name of the individual that ordered the package/item. If this icon appears, ***click*** on it for a list of eligible recipients. This will only appear if the organization has a table listing all employees. Any questions please contact your @Par Administrator or @Par Support team

Pkg. – Enter number of packages being received.

Vendor – Enter the vendor name.

Item Desc – Enter the Item description.

ShipTo ID – *Enter* the **ShipTo ID.** If the default **ShipTo ID** is entered in User Parameters, the data will display automatically.

Dept ID – Enter the department where the package/item was ordered.

PO ID – IF applicable, enter this now.

- This field does NOT integrate with @Par Deliver.
- The PO ID field in Deliver is from the Receive PO status screen.

Line # - Enter PO Line # here

Carrier – *Enter* the carrier or select the carrier from the drop down list that delivered this package/item. If Default **Carrier** is entered in User Parameters, the data will display automatically.

Note Section – Use the keyboard to enter a note in the box at the bottom of the screen. See **Figure 37** for an example

Print **- *TAP*** this button to print a Receipt label.

NOTE: If the following ***"*Real time uploads of Non PO item receipts to server"** profile parameter is checked and a label is required for delivery the user **MUST** print a label before leaving this screen.

Realtime upload of Non PO item receipts to server	☐	[Checking this will upload the Non PO receive event information to server if network connection is available]

Checking the option sends the data immediately to the ERP system when ***tapping*** on the Save button, so if the label is required, it must be printed before saving.

Back **- *TAP*** this button to return to **Receive Status** screen **without** saving information.

Save&Next **- *TAP*** this button to save current information and continue to receive Non PO items.

Save **- *TAP*** this button to save the current information

To send to the server from the **Receive Status** screen ***highlight*** the record and ***TAP*** the Send Selected button or simply ***TAP*** the Send All button.

If there are Comments associated with the records, in PO Receive, NON PO Receive, or IUT Receive, there will be a pop up comment section display prior to sending

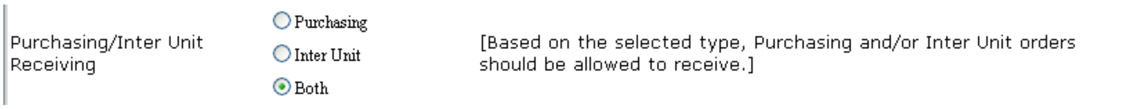
In order for any comments to appear, the following profile parameter must be checked by the supervisor

Display PO comments on the HHT	☑	[Selection of this parameter will display PO comments on the HHT as a popup message]

If comments are set up on the ERP system, PO Header comments will appear on the **Receive Status** screen and PO LINE comments will appear on the **Receive Items** screen.

Receiving IUT (Inter Unit Transfer) Orders Workflow

The **@Par Receive** module allows users to receive in Inter Unit Transfers (IUT) also. This is dependent on whether the ERP supports the process and if the supervisor has selected the following profile parameter



- ***Selecting* Both** will add the IUT button on the HHT. **Figure 38**
- ***Selecting* Purchasing** will allow you to Receive POs only **Figure 39**
- ***Selecting* Inter Unit** only will allow you to Receive only IUT as in **Figure 40**

NOTE: Allocate Inventory Business Units from the **@Par Web page or server, must** be allocated to users in order for this option to work.

With the IUT parameter enabled a user will be able to receive items transferred from one location to another. (Transfer replenishment)

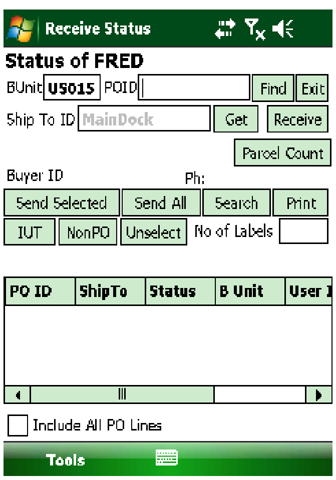


Figure 38

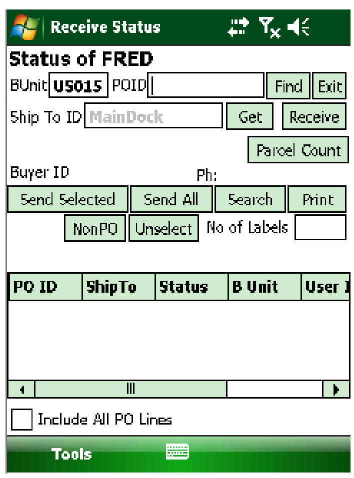


Figure 39

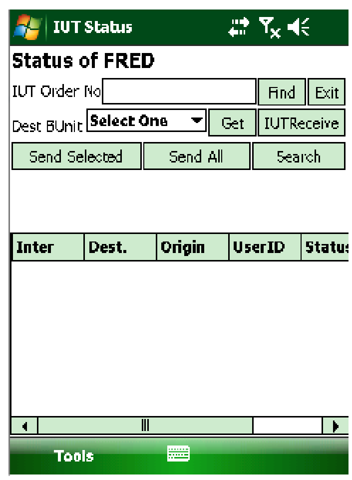


Figure 40

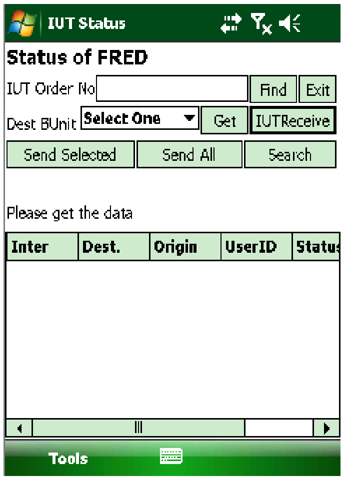


Figure 41

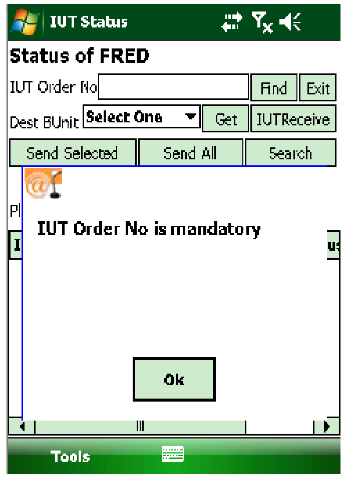


Figure 42

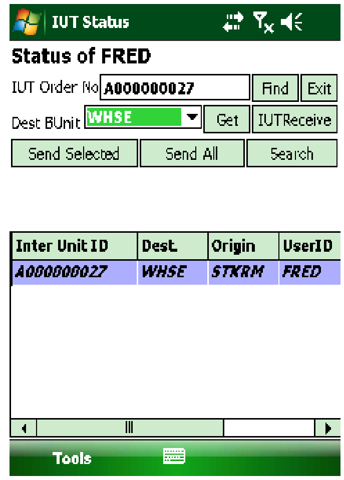


Figure 43

If the user ***TAPS*** the IUT or IUTReceive button without selecting anything the screen changes **Figure 41**

If the user ***TAPS*** the Get button without selecting anything the screen changes **Figure 42**

Scan or ***enter*** manually the **IUT Order No** and ***select*** the **Dest BUnit** from the drop down list, then ***TAP*** the Get button **Figure 43**

A record locked message may appear if another user has downloaded the same IUT order. This will occur if the following org group parameter is unchecked by the @Par Administrator

Multiple users receiving an Inter Unit transfer	☐	[Selection of this parameter allows multiple users to download the same IUT order on to the HHT for receiving]

If the organization allows multiple users the ability to download and receive the same IUT at the same time this ***must*** be checked.

With the **IUT Order No** found ***highlight*** it and ***TAP*** the IUTReceive button ***Figure 44***

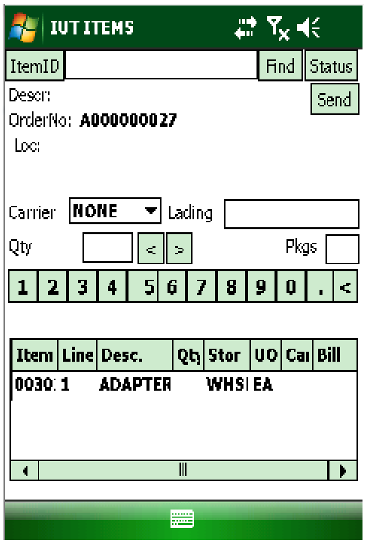


Figure 44

Figure 45

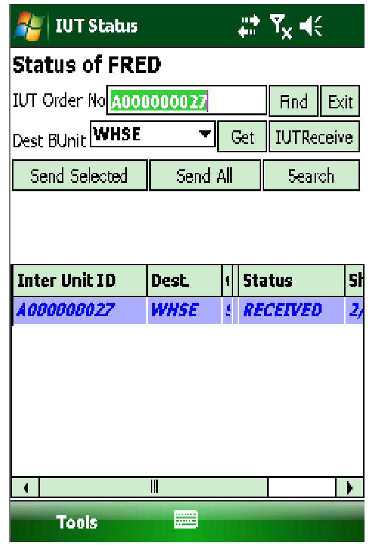


Figure 46

Either ***TAP*** on the item if visible on the HHT in the grid, ***enter*** the item ID to receive in the ItemID field, or ***scan*** an item's bar code label in the ItemID field to receive it in.

Using any of the aforementioned methods to start receiving an item in the detail section (upper section of the HHT) will display **Figure 45**

Enter the Qty received and continue to receive all items using this same process until done.

TAP on either the Status button to return to the IUT Status screen or ***TAP*** the Send button to move the data to the ERP system.

Tapping the Status button will bring you back to the IUT Status screen as shown in **Figure 46**

Once satisfied that the IUT Order is ready, ***TAP*** the Send Selected button or the Send All button to send the data to the ERP and the record will be removed from the HHT.

Functionally the reason the user may want to go back to the IUT Status screen is in the circumstance the wrong IUT order was received. From the IUT Status screen you can use the **Tools → Delete** option from the bottom left side of the HHT and delete the IUT before sending information to the ERP. This will allow the user the ability to then receive in the correct order.

The search process for IUT is the same for Receive PO.

Receiving Lot or Serial Controlled Items Workflow

Lot and Serial controlled items can be maintained either in @Par or in an ERP system that manages the items, such as PeopleSoft. If an ERP does not have this capability the items can still be managed in @Par for reporting and tracking purposes.

The following Org group parameters drive the process which is explained in detail in the @Par Receive web guide.

Enable Lot /Serial Tracking	○ None ○ MMIS ◉ AtPar	[Lot/Serial tracking information is stored based on the selected option]
Search on remote server for POs	☑	[Selection of this parameter searches remote server after local search on HHT]
Send Lot /Serial information to MMIS	☐	[Checking this will update Lot /Serial tracking information in MMIS]
Store Lot /Serial information to @Par	☑	[Checking this will store Lot /Serial tracking information in @Par for reporting and recall management purpose]

POs being received that are Lot or Serial controlled items download as “normal” POs. The related fields to use when receiving will be on the Receive Items screen.

When a user first enters the Receive Items screen the following screen appears **Figure 47**

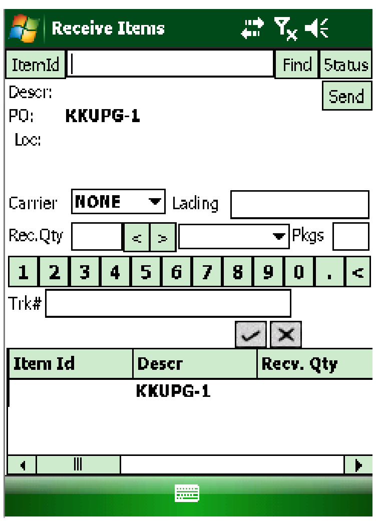


Figure 47

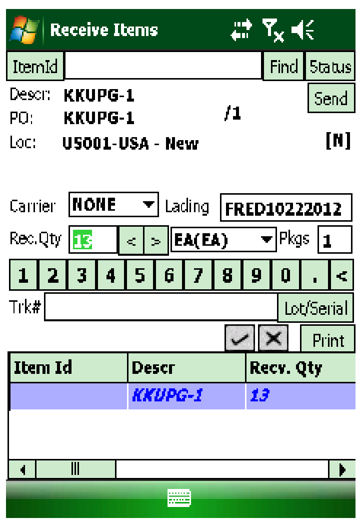


Figure 48

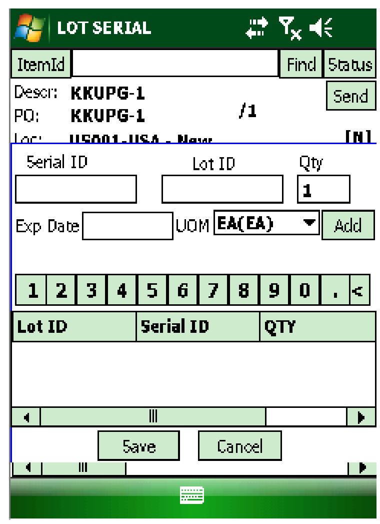


Figure 49

When user scans an Item ID or ***highlights*** the item in the grid, and it is a lot controlled/serial id item, the screen will automatically change to the Lot/Serial button will appear on the screen **Figure 48**

TAP the Lot/Serial button and the screen in **Figure 49** appears

Enter or ***scan*** the **Serial ID and/or Lot Id**

The **QTY** field automatically defaults with a value of 1 – This is an editable field

Enter the Exp Date (Item Expiration Date) with a format of MM/DD/YY

Select the **UOM and *TAP*** the Add button. This adds the item to the list view/grid **Figure 50**

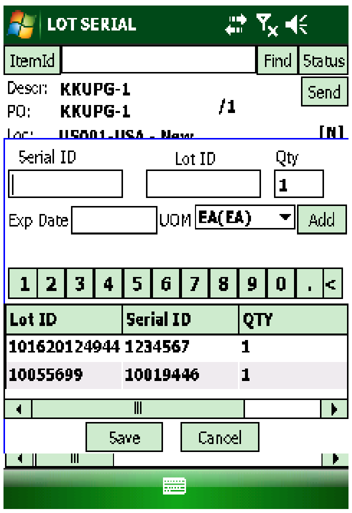


Figure 50

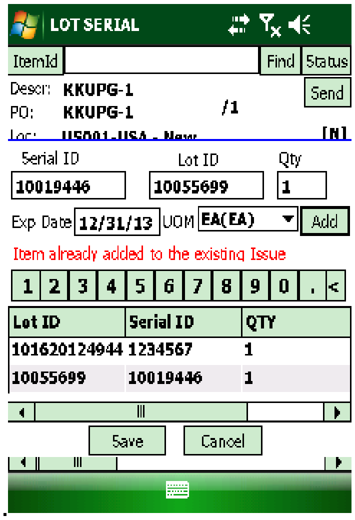


Figure 51

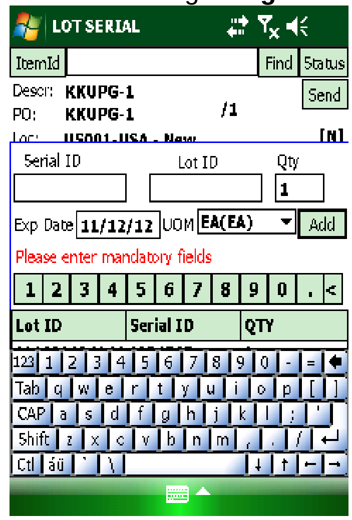


Figure 52

User will keep adding this information until all items are received and ***TAP*** the Save button which returns the user to the Receive Items screen to continue receiving in other items if necessary. Once the item is saved it can only be removed from the Receive Status screen.

If a user enters the incorrect information and wants to go back they will TAP the button

If a user attempts to receive in an item with same serial number and same lot number the screen in **Figure 51** will appear

If required fields are not entered the message in **Figure 52** appears

If the expiration date is previous to the receipt date users will receive the following message **Figure 53**

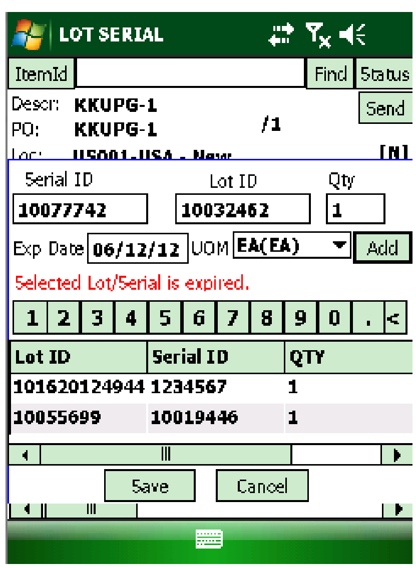


Figure 53

Supervisors will have ability to review the Lot/Serial Tracking report from the @Par Web page.

Recall Notification

If the organization is utilizing the Recall Management capability from @Par and an item is on recall during time of receiving, the following message will appear. **Figure 54**

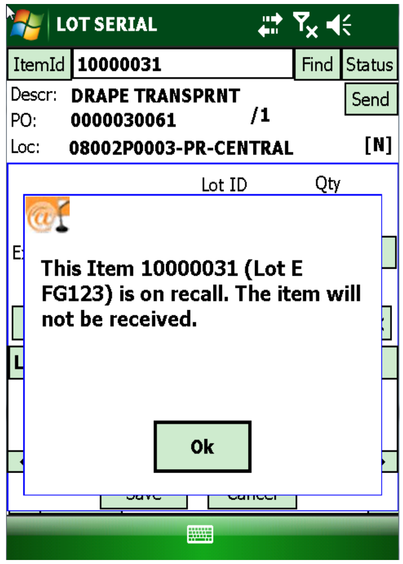
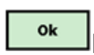


Figure 54

The user will ***click*** the 

button and report this to their supervisor. The system will NOT allow receiving an item that is on recall.

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PARCEL COUNT

An organization's Carriers (i.e. UPS, FEDEX, etc.) drop off packages at the receiving dock and get a signature from the receiver or the dock supervisor for the packages dropped off. There is no confirmation on the number of packages dropped though a manifest is provided by the carrier that tells them how many packages are dropped off. But the confirmation happens only after receivers receive the packages. By then the carrier has left to continue other deliveries and it becomes difficult for receivers to raise any disputes when there are less number of packages dropped off versus what the manifest says.

The **Parcel Count** option will allow receivers to perform a simple parcel or piece count on an HHT before the packages are unloaded from the truck to confirm that the manifest matches with the actual count.

The process is as the carrier scans the tracking number and unloads a package, the receiver can use **Parcel Count** to scan the tracking number and place the package in a staging area.

This process can be performed in either wireless environment or non-wireless environment.

First the @Par Administrator or Supervisor must select the following profile parameter

Parcel Count	☑	[Checking this allow the receiver to perform parcel counts on the HHT]

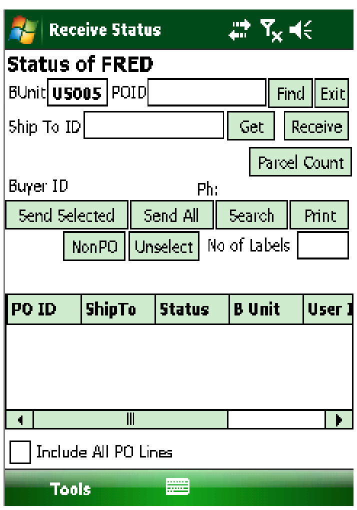

Figure 55

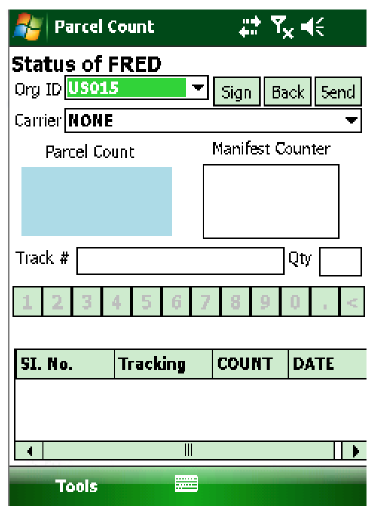

Figure 56

TAP the Parcel Count button. **Figure 56**

Select on **Org ID** from the drop down list

Select a carrier from the drop down list. If the User Parameters on the @Par Web pages has a Default Carrier entered it will appear here automatically. This can be changed or overridden as needed.

There are two alternative methods in which a user can continue:

1. Enter the manifest total into the Manifest Counter section first or
2. Begin scanning package tracking numbers of packages (Parcel Count)

Either method is fine. The goal is to ensure the Manifest total equals total packages scanned.

As the user scans the packages the Parcel Count section will populate after each scan Figure 57

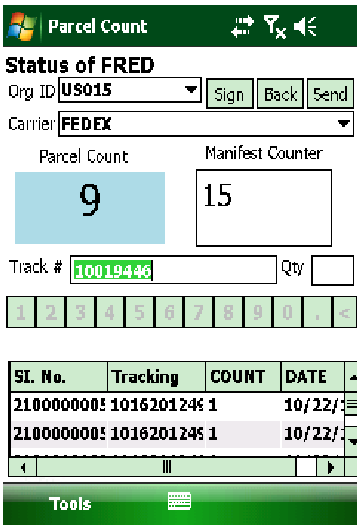

Figure 57

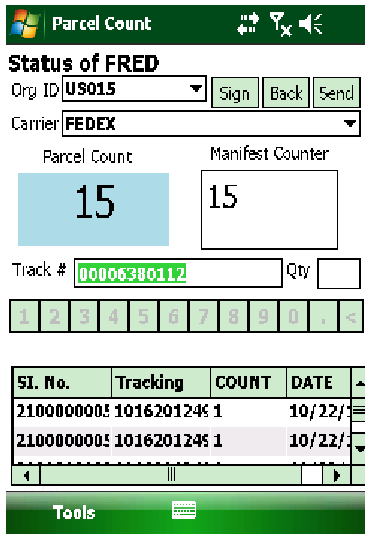

Figure 58

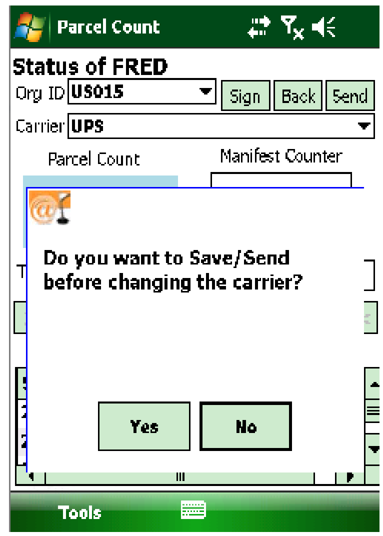

Figure 59

NOTE: The HHT user must scan the tracking number. Manual entry of tracking number is not allowed.

If the same tracking number is scanned again and the following profile parameter is checked, the count will increment in the Count field and under Parcel Count section above the grid but a new row will not be added to the grid

Disable scanning same tracking number in Parcel Count	☐	[Checking this will not increment the count total when the same tracking number is scanned again, the cursor will just highlight the tracking number already available in the grid.]

If the disable scanning same tracking number parameter is checked users can scan the same tracking number multiple times but the count value will **not** increment.

If the receiver scans an incorrect tracking number they can delete by ***highlighting*** the row in the grid and click the **Tools → Delete** record button

Once the packages have been scanned the count totals should match as in **Figure 58**

If the receiver tries to change the Carrier in the middle of scanning packages the message in **Figure 59** appears

- ***Click*** the Yes button – Data will be sent to server if receiver is in wireless otherwise receive must cradle the HHT to update server.
- ***Click*** the No button – Screen refreshes to current Carrier and information already captured will display

If the receiver tries to Send without entering the Manifest count the follow message appears **Figure 60**

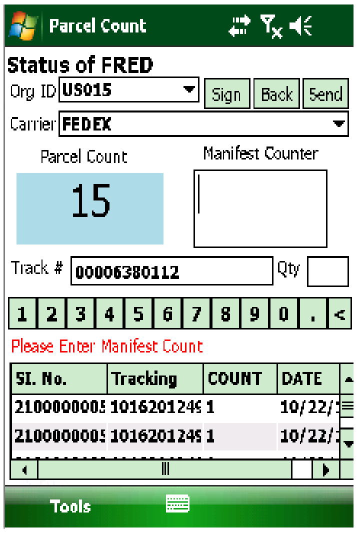

Figure 60

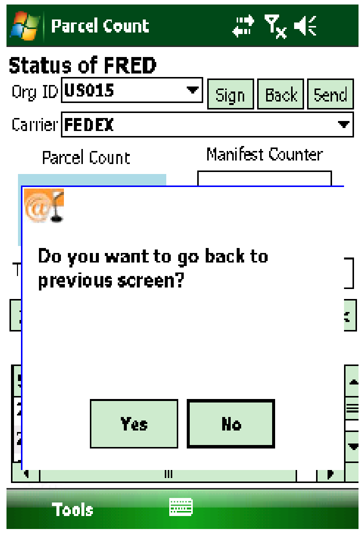

Figure 61

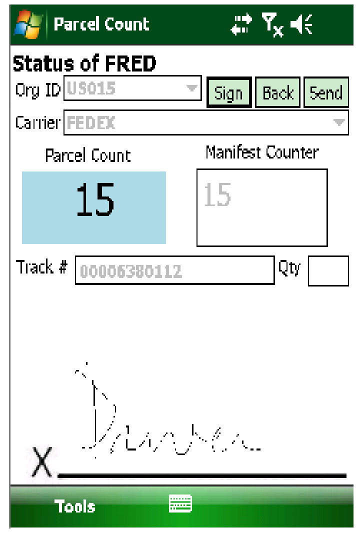

Figure 63

When the receiver ***clicks*** the Back button, a message appears **Figure 61**

- ***Click*** the Yes button – Data will be sent to server if receiver is in wireless otherwise receive must cradle the HHT to update server.
- ***Click*** the No button – Screen refreshes to current Carrier and information already captured will display

NOTE: Once the receiver returns to the Receive Status screen they can't go back to add, edit, etc. They can only start a new Parcel count

Once scanning is complete a signature should be captured from the delivery driver **Figure 63**

If they have not clicked on Send or if there is no network connection when receiver sends, the data will be saved on the HHT so they can cradle the HHT and send from the Receive status screen

Once scanning is complete and signature has been captured the user ***clicks*** the Send **button.**

Session Expiration

You will receive the popup message below (**Figure 64**) if you have exceeded the idle time allotted to you by the @Par Administrator. The @Par Administrator manages the HHT and login idle times and if you are experiencing frequent expiration message ask them to increase this setting.

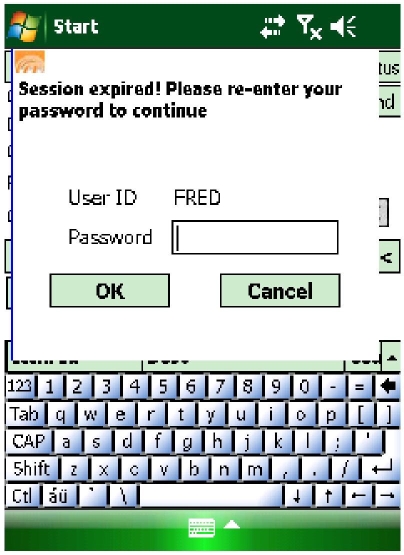

Figure 64

This is in place for a couple reasons:

1. If the session is left logged in, ANYONE could come to that HHT device and start entering information etc. So it is set up for Security Purposes.
2. HHT/System Performance. We have found that by having an inactive session time out, the performance of ALL HHTs and System is increased.

User needs to enter their password and return to the application.

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