



TOP

Receive (Receipt) a Purchase order

Note 1: *In most circumstances it takes 10 seconds to receive a purchase order.*

Note 2: TechOne Requirements

In TechOne a supplier invoice cannot be processed for payment until the purchase order is 100% correctly received and approved. I.e. it has to be a PERFECT match to the cent. It is also a 1 on 1 process therefore bulk receipting against one order does NOT work. I.e. The invoices must be received and approved SEPARATELY, ONE AT A TIME, you cannot receive the total amount of multiple invoices in one go.

Note 3: *Due to the facts mentioned in Note 1, it's not recommended to risk receiving incorrectly unless you know exactly how much the invoice is. An incorrect receipt will result in receipt cancellation and re-receive.*

Note 4: *The best practice we have discovered so far – Since most of the invoices are sent to Finance directly, unless it has already been received by you, Finance AP (Lynn) will receive the order on your behalf based on the invoice amount and then submit to you for approval. You will receive an Outlook email alert and then go to My Workflow tab to review the task in the inbox. **Please ONLY approve if all relevant goods and/or services have been received in good order and the invoice amount is satisfactory for approval.** If you are not happy with the invoice amount, please contact your supplier to re-issue a new one.*

Note 5: *Some users have chosen to always receive their purchase orders by themselves to have more controls and Finance have no problem with it (that's how it should work in theory anyway) – as long as it's done correctly and in a timely manner.*

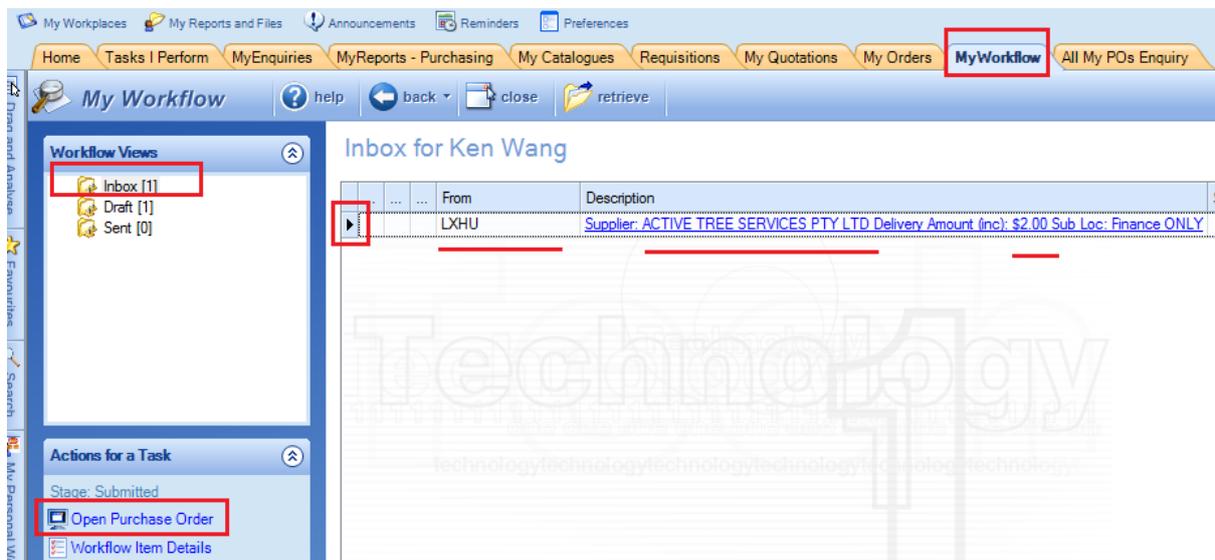
Note 6: *If there is a backlog of multiple invoices to be received against the same purchase order, Finance AP (Lynn) will NOT be able to receive them on your behalf and will notify you to do it yourself. The reason is that the same order cannot be received again until the previous receipt is approved.*

Note 7: *We are still in the transition period, only 3.5 months in since Go-live. The practice may change in future in order to improve efficiency.*

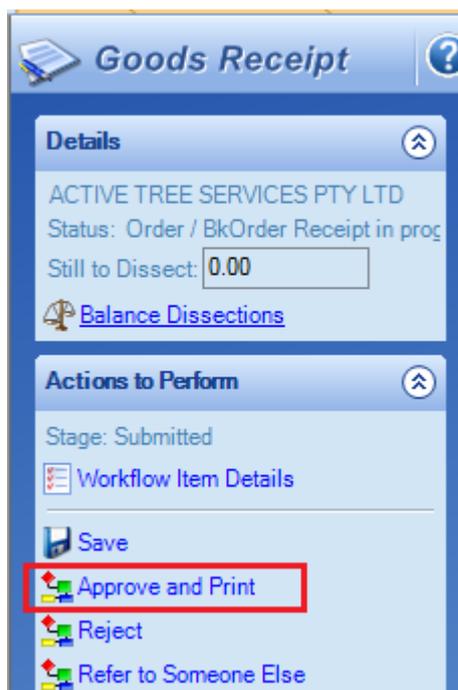
Steps below will show you how to approve a receipt sent by Finance AP (Lynn)

1. My Workflow – Inbox – Highlight the task – Click Open Purchase Order
2. Click Approve and Print
3. Make sure none of the transmission methods is ticked and click OK.

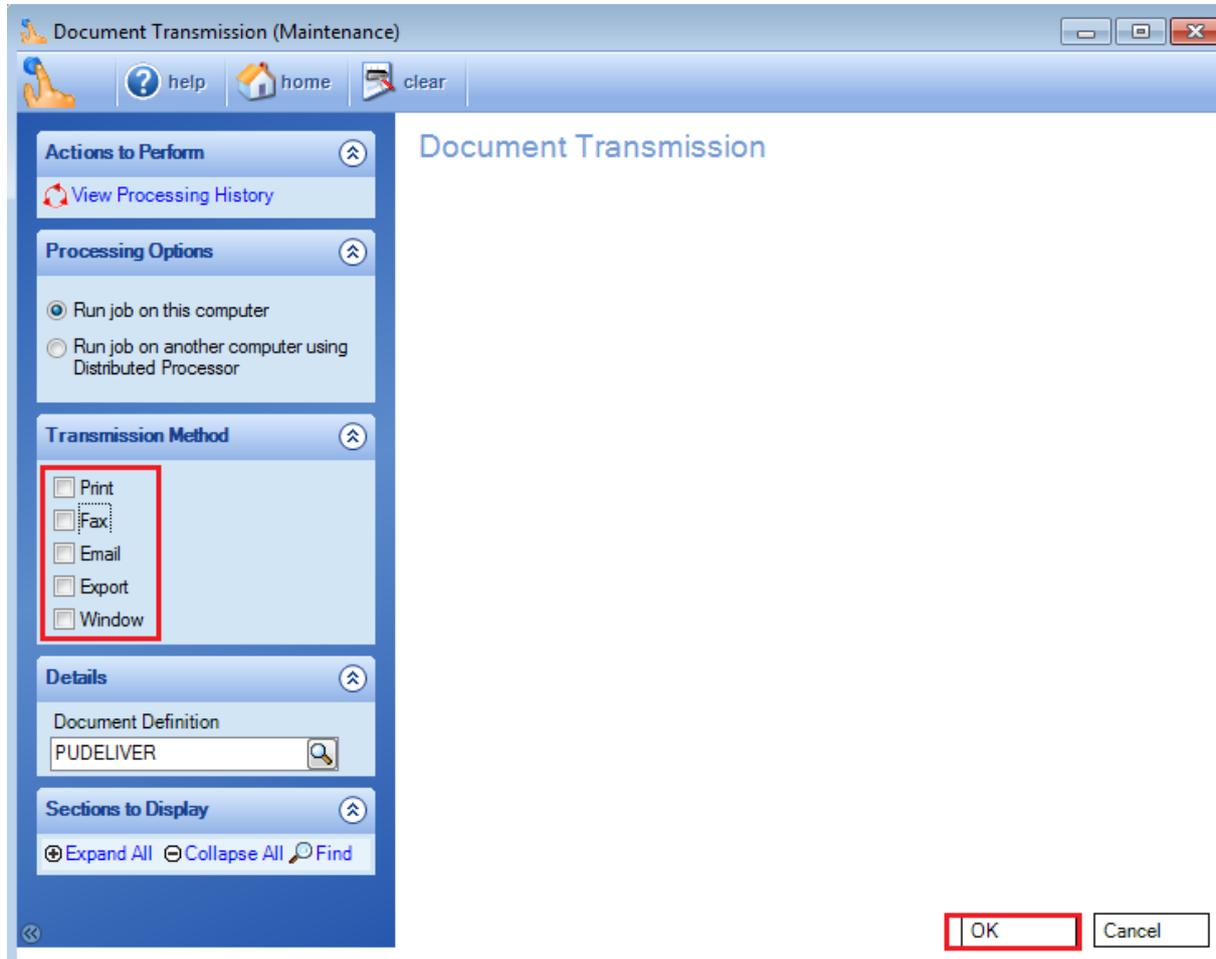
1.



2.



3.



Steps below will show you how to receive your purchase order

1. My Procurement, My Orders tab and retrieve. Highlight the purchase order and click Receive Goods on the left.

Note: My Orders tab only displays outstanding orders.

2. Click Line detail on the left.

3. If you used S (Services) when the order was raised, the screen will now look like this. Type the total invoice amount including GST in the highlighted field (Delivered/Amt Inc) and press the Tab key on your keyboard. There are 3 scenarios:

A. Partial receipt: a backorder of the remaining balance will be generated. Cancel the balance if it's no longer required. *(See the Order Management guide – Order cancellation)*

B. Full receipt: the order will be completed and disappear from My Orders tab.

C. Over receipt: we have a tolerance system to ensure small price variances and delivery costs are allowed. However, the system won't accept it if the difference is significant and order amendment will then be required. *(See the Order Management guide – Purchase order amendment)*

4. Click Approve

Note: There is no \$ limit for receipting, you can receive and approve any amount within the purchase order scope. However if you are not comfortable to receive a substantial amount (such as a contract claim invoice of \$500K) you can submit your receipt for approval. Also don't forget that you can always attach documentation/emails to support your receipt.

1.

My Procurement TechnologyOne Enterprise Suite - Production direct

File Edit View Tools Actions Window Help

My Workplaces My Reports and Files Announcements Reminders Preferences

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List help forward close clear retrieve

Actions to Perform

- Receive Goods
- Amend Order
- Cancel Order
- Save as New Requisition
- Re-Print Order
- Re-Print Last Amendment
- Re-Print Receipt Note
- Re-Print Return Note

My Orders

To find an order, enter the Location and Purchase Order Number

Location: PURC Order Number: [] []

OR

Enter search criteria and retrieve Purchase Orders

Search: [] Retrieve Saved Search

Location = PURC

Supplier Name like []

Requisition Create User = []

[Add Criteria](#) [Clear Criteria](#) [Clear Values](#) [Save Search](#) [Load Search](#)

Location	Order Number	Supplier Name	Order Date	Order	Received Amt	Status
PURC	PU000996/1	BUNNINGS (NSW)	8/05/2014	0.00	0.00	Order
PURC	PU001040/1	MUIRS AUTOMOTI...	9/05/2014	0.00	0.00	Order
PURC	PU001964/1	SLATER AND SON...	19/06/2014	0.00	0.00	Order
PURC	PU000882/1	LEONARD HOLT R...	9/05/2014	0.01	0.00	Order

2.

My Procurement - TechnologyOne Enterprise Suite - Production direct

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Goods Receipt help back home close clear retrieve

Details

BAKERS CONSTRUCTION INDUSTRI
Status: Order / Order to Receive
Still to Dissect: 0.00
[Balance Dissections](#)

Actions to Perform

- Save
- Submit for Approval
- Approve
- Approve and Print

Sections to Display

- Order Header
- Order Lines
- Line Detail
- Additional Line Text and Comments
- Settings
- Supplier Address
- Attachments
- Amendment Details
- Expand All Collapse All Find

Purchase Order

Location: PURC Order Number: PU001141 0

Order Header

Receipt Date: 17/07/2014

Receipt Comments: []

Supplier Account: AP 10570 Sub Location: DEP

Supplier Name: BAKERS CONSTRUCTION & INDUSTRI Default Due Date: 16/05/2014 [Apply to Lines](#)

Order Comments: GLOVES DISP NITRILE POWDERFREE LGE (100)
Part No: 00905403
Quantity: 15 Box

Reference: []
Supplier Ref: []

Order Lines

Enter Search Criteria to find lines to receive

[Add Criteria](#) Received Qty: [] [Receive Selected Lines](#)

Line Type*	Identifier Name	Identifier Number	Description	Service*	GST Code	Ordered Unit Name	Ordered Qty	Order Unit Amt Inc	Order Amt Inc
<input type="checkbox"/> Non Stock			GLOVES DISP NI...	S	C	ONLY	0.000000	0.000000	178.20

3.

My Procurement - TechnologyOne Enterprise Suite - Production direct

File Edit View Tools Actions Window Help

My Workplaces My Reports and Files Announcements Reminders Preferences

Home Tasks I Perform MyEnquiries MyReports - Purchasing My Catalogues Requisitions My Quotations **My Orders** MyWorkflow All My POs Enquiry

Goods Receipt help back home close clear retrieve

Details
 BAKERS CONSTRUCTION INDUSTRI
 Status: Order / Order to Receive
 Still to Dissect: 0.00
[Balance Dissections](#)

Actions to Perform
[Save](#)
[Submit for Approval](#)
[Approve](#)
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Sections to Display
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[Amendment Details](#)
[Expand All](#) [Collapse All](#) [Find](#)

Purchase Order Location: PURC Order Number: PU001141 0

Line Detail

Enter Quantities Received: [Add New Line](#) [Delete Line](#) [Previous Line](#) [Next Line](#)

Line Type:* Non Stock Goods/Service:* Service

Description: GLOVES DISP NITRILE POWDERFREE LGE (100)

	Quantity	Unit Name	Amt Inc	GST Code / Amt
Ordered:	0.000000	ONLY	178.20	C 16.20
Delivered:	0.000000	ONLY	0	C 0.00
Received:	0.000000		0.00	0.00
Returned:	0.000000		0.00	0.00
Backordered:	0.000000		178.20	16.20

Receipt Comments:

Return Reason:

Delivery Point: GENERAL DEPOT Depot (Projects)

Charge Code: DELIVERY DEPOT Depot

Account Dissection: GL 10-9000-9000-11001 Council Balance Sheet Assets IC - Main Store

[Dissect to Multiple Accounts](#)

3A.

Purchase Order

Location: PURC Order Number:

Line Detail

Enter Quantities Received: [Add New Line](#) [Delete Line](#) [Previous Line](#) [Next Line](#)

Line Type:* Non Stock Goods/Service:* Service

Description: GLOVES DISP NITRILE POWDERFREE LGE (100)

	Quantity	Unit Name	Amt Inc	GST Code / Amt
Ordered:	0.000000	ONLY	178.20	C 16.20
Delivered:	0.000000	ONLY	150.00	C 13.64
Received:	0.000000		150	13.64
Returned:	0.000000		0.00	0.00
Backordered:	0.000000		28.20	2.56

Receipt Comments:

3B.

Purchase Order

Location: PURC  Order Number:

Line Detail

Enter Quantities Received: [Add New Line](#) [Delete Line](#) [Previous Line](#) [Next Line](#)

Line Type:* Non Stock  Goods/Service:* Service 

Description: GLOVES DISP NITRILE POWDERFREE LGE (100)

	Quantity	Unit Name	Amt Inc	GST Code / Amt	
Ordered:	0.000000	ONLY	178.20	C	16.20
Delivered:	0.000000	ONLY 	178.20 	C 	16.20
Received:	0.000000		178.2 		16.20
Returned:	0.000000		0.00 		0.00
Backordered:	0.000000		0.00 		0.00

Receipt Comments:

3C – Acceptable tolerance

Purchase Order

Location: PURC  Order Number:

Line Detail

Enter Quantities Received: [Add New Line](#) [Delete Line](#) [Previous Line](#) [Next Line](#)

Line Type:* Non Stock  Goods/Service:* Service 

Description: GLOVES DISP NITRILE POWDERFREE LGE (100)

	Quantity	Unit Name	Amt Inc	GST Code / Amt	
Ordered:	0.000000	ONLY	178.20	C	16.20
Delivered:	0.000000	ONLY 	200.00 	C 	18.18
Received:	0.000000		200 		18.18
Returned:	0.000000		0.00 		0.00
Backordered:	0.000000		0.00 		0.00

Receipt Comments:

3C – Order amendment required

Purchase Order

Location: PURC  Order Number:

Line Detail

Enter Quantities Received: [Add New Line](#) [Delete Line](#) [Previous Line](#) [Next Line](#)

Line Type:* Non Stock Goods/Service:* Service

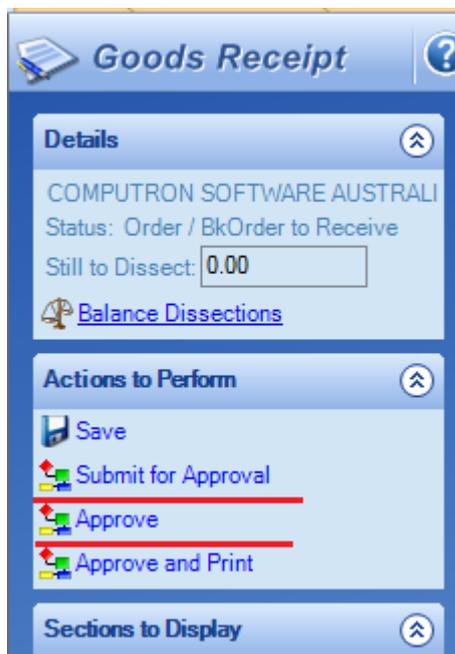
Description: GLOVES DISP NITRILE POWDERFREE LGE (100)

	Quantity	Unit Name	Amt Inc	GST Code / Amt	
Ordered:	0.000000	ONLY	178.20	C	16.20
Delivered:	0.000000	ONLY 	800.00 	C 	72.73
Received:	0.000000		800 		72.73
Returned:	0.000000		0.00 		0.00
Backordered:	0.000000		0.00 		0.00

Receipt Comments:

 Line 00001: Delivered plus Backorder Amount \$727.27 exceeds the Ordered Amount tolerance limit \$662.00.

4.



The screenshot shows a 'Goods Receipt' screen with a blue header and a question mark icon. The main content is organized into three sections, each with a collapse/expand arrow:

- Details:** Shows 'COMPUTRON SOFTWARE AUSTRALI', 'Status: Order / BkOrder to Receive', and 'Still to Dissect: 0.00'. There is a 'Balance Dissections' link with a calculator icon.
- Actions to Perform:** Lists 'Save', 'Submit for Approval', 'Approve', and 'Approve and Print'. The 'Approve' and 'Approve and Print' items are highlighted with red horizontal lines.
- Sections to Display:** This section is currently empty.