

Purchase Order (PO) Receiving

Entering a Purchase Order Receiver is the process in which Schools/Departments certify that goods have been received or services have been provided. This certification let's Accounts Payable know that the invoice received in Accounting is ok to pay. To enter a receiver for goods received, you must physically view and inspect the goods carefully examining to verify the correct quantity and condition. **Do not rely on information provided on a packing slip/invoice to enter the quantity in the receiver.**

Please follow the below steps for entering a PO Receiver:

- 1) Navigate to Purchase Order Receiving (2 Ways)
 - a. Tyler Menu
 - i. Departmental Functions
 1. Purchase Order Receiving



The screenshot displays the 'Tyler Menu' interface. At the top, there is a search bar with the placeholder text 'Search' and a magnifying glass icon. Below the search bar, a list of menu items is shown. The 'Munis' section is expanded, and 'Departmental Functions' is highlighted in yellow. Under 'Departmental Functions', 'Purchase Order Receiving' is also highlighted in yellow. At the bottom of the menu, there are two buttons: 'Refresh Menu' with a circular arrow icon and 'Close' with an 'X' icon.

- b. Tyler Menu – Search Option
 - i. Receiving

Tyler Menu

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- ▾ Search ('Receiving')
 - Purchase Order Receiving
 - Inventory Receiving
 - Purchase Order Receiving Report
- ▾ Munis
 - Financials
 - Human Resources/Payroll
 - General Revenues
 - Departmental Functions
 - System Administration
 - Help

 Refresh Menu  Close

TIP: Right click on menu item, and add to favorites any screens that you will frequently use within MUNIS Dashboard. Dashboard will also maintain a shortlist of recent activity screens for quick access.

2) Enter PO Receiver Information

Purchase Order Receiver - Municipality of Danvers (Jan 10 2015)

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Search Add Update Delete Print Text file PDF Email Attach Notes Alerts Audits

Purchase Order

PO fiscal year PO number Vendor Vendor alpha Item Description Manufacturer Manufacturer item no. Vendor item no.

Total received quantities:
Ordered Received Remaining

3way match quantities:
Invoiced Pending Available to pay Required to satisfy pending

Received Returned

Received Details

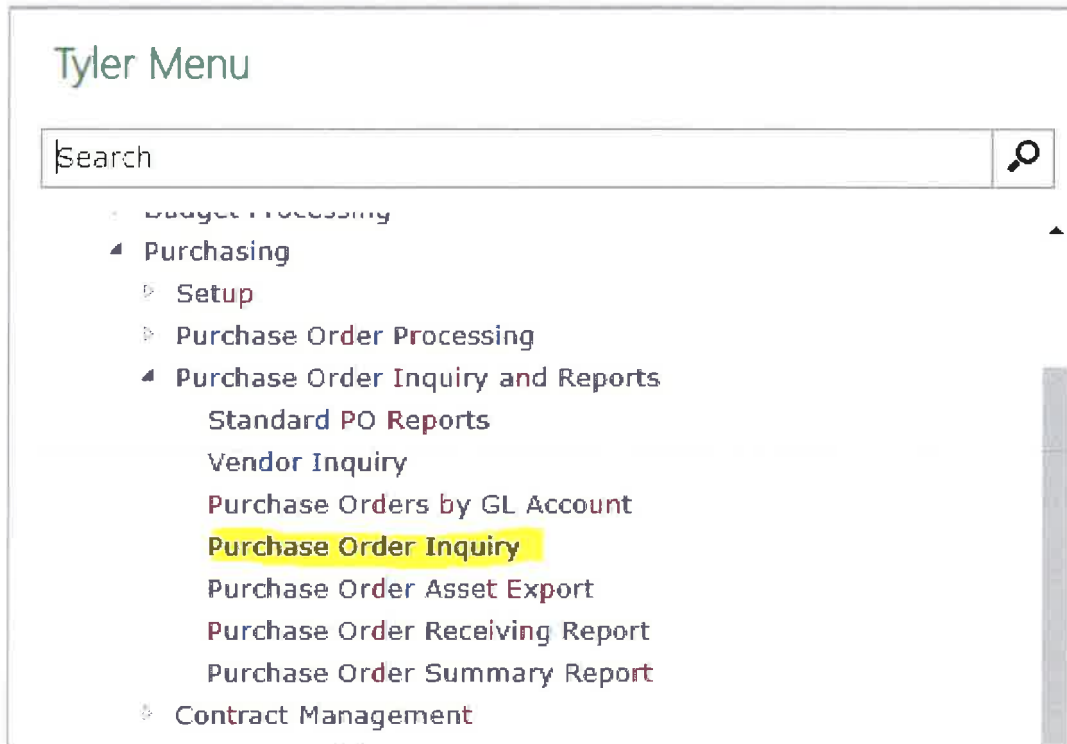
Quantity Dollar amount Date
Packing slip# Fixed asset# By
Comments
Quantity invoiced

Fully invoiced
Close PO

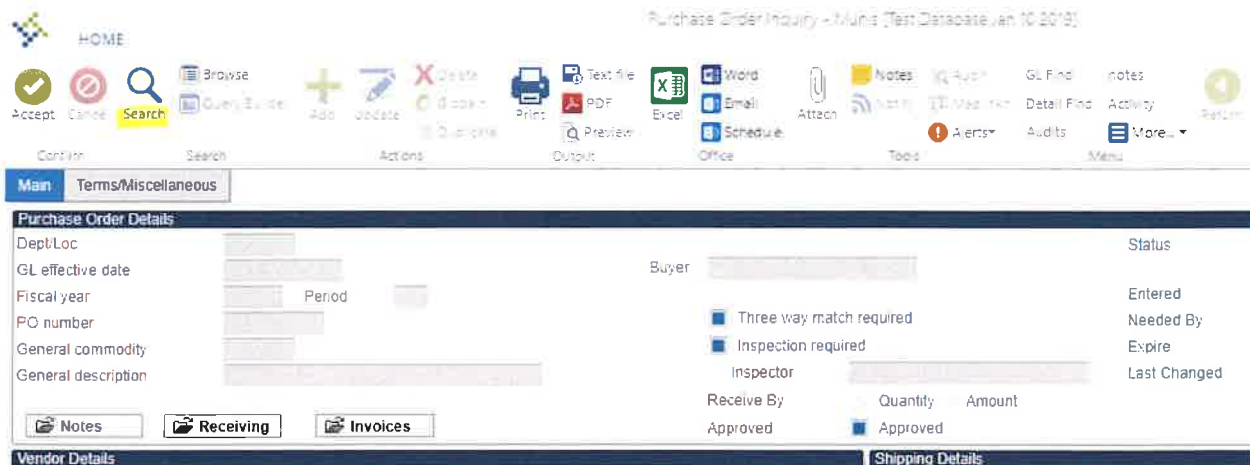
- Click the green "+" sign to create a new PO receiver record.
- Verify the **PO fiscal year** (Change if necessary)
- Enter **PO number**
- Enter **Line #** for the PO you want to receive
- NOTE: Once the above lines are populated and you tab to the next field, information will populate for the remaining Purchase Order (top section) fields on the screen.
- Enter the **Quantity** of items received (Physically Counted)
- Enter any appropriate **Comments** and then click the green ✓ mark.
- FOR FINAL RECEIPT ONLY**, click "**CLOSE PO**" to close out the Purchase Order.

Frequently Asked Questions

- 1) Has an invoice been paid for this Purchase order?
 - a. By utilizing the PO Inquiry screen, you can perform a search on invoices processed/paid on the PO in question (see below):
 - b. Navigate to **Purchase Order Inquiry**



- c. Perform a Search by Purchase Order Number



d. Enter PO Number and click the green ✓ mark.

Purchase Order Inquiry - Munis (Test D)

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Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Excel Word Email Schedule Attach

Confirm Search Actions Output Office

Purchase Order		Vendor	
Dept/Loc	<input type="text"/>	Vendor number	<input type="text"/>
Fiscal Year	<input type="text"/> Period <input type="text"/>	Status	<input type="text"/>
PO number	<input type="text"/>	Name	<input type="text"/>
Gen commodity	<input type="text"/>	Type	<input type="text"/>
Entry date	<input type="text"/>	Class code	<input type="text"/>
Needed by date	<input type="text"/>	Geographic code	<input type="text"/>
Status	<input type="text"/>	Shipping Details	
Type	<input type="text"/>	Ship To	<input type="text"/>
Requisition number	<input type="text"/>	Reference	<input type="text"/>
Contract	<input type="text"/>	Line Detail	
Work Order Number	<input type="text"/>	Required by date	<input type="text"/>
General Description	<input type="text"/>		
Open amount	<input type="text"/>		

e. Click on the **Invoices** folder

Purchase Order Inquiry - Munis (Test D)

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Confirm Search Actions Output Office Tool

Main Terms/Miscellaneous

Purchase Order Details			
Dept/Loc	967	SN - PROCESSING CENTER	Buyer Heather Steide
GL effective date	07/19/2018		
Fiscal year	2019	Period 01	
PO number	<input type="text"/>		<input checked="" type="checkbox"/> Three way match required
General commodity	393		<input type="checkbox"/> Inspection required
General description	<input type="text"/>		Inspector <input type="text"/>
			Receive By <input type="text"/>
			Approved <input checked="" type="checkbox"/> Appr

Notes Receiving **Invoices**

- f. Within folder you will be able to review all invoices processed, status, check number, and check date (see below):

Purchase Order Inquiry - Munis [Test Database Jan 10 2019] > Invoices for Year Purchase Order 2019 21930083

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Confirm Search Actions Output Office Tools

Document	Invoice	Year	Inv Date	Invoice Amount	Liquidated Amount	Status	Check	Check Date
2018020684	638360	2019	08/29/2018	1225.50	1225.50	Paid	133011	08/30/2018
2018022041	646459	2019	09/26/2018	1225.50	1225.50	Paid	133467	09/27/2018
2018022402	648715	2019	10/03/2018	928.80	928.80	Paid	133621	10/04/2018
2018023523	654530	2019	10/24/2018	2193.00	2193.00	Paid	133950	10/25/2018
2018023781	655622	2019	10/26/2018	129.00	129.00	Paid	134119	10/30/2018
2018025346	661317	2019	11/21/2018	9567.00	2193.00	Paid	134566	11/27/2018