

**Desk Manual #:** 726-111-001 – How to receive a good or service

**Purpose:** The purpose of this handout is to describe the procedures performed by MISD to receive a good or a service. The user groups that can perform this action are the following:

1. Secretaries
2. Warehouse Operators
3. Budget Managers (Campus or Departments)
4. Accounts Payable Employees
5. Purchasing Department Employees

**Dates in which procedures have been and are to be followed:** Fiscal Year 2018 and forward

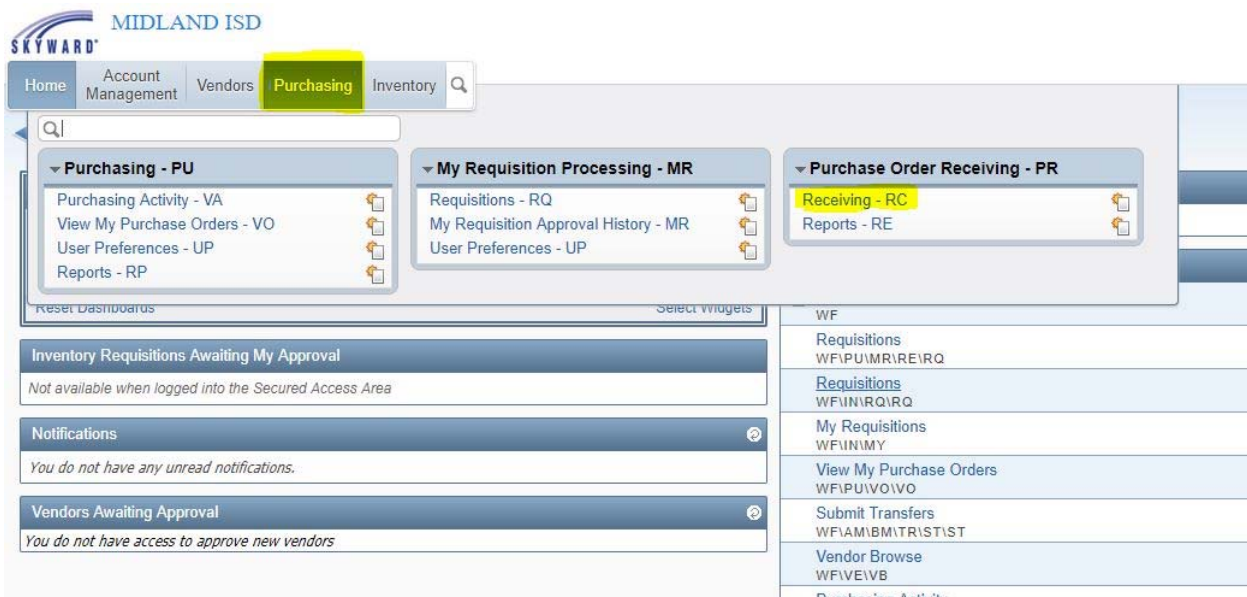
**Last day updated:** 10/23/2018

**Person that performed last revision & update:** Arturo Valenzuela at Financial Services

**General Descriptions:** MISD aims to take advantage of the capabilities of the skyward software at every opportunity, one of these capabilities is to use the “receiving feature in Skyward”. This will allow MISD employees to receive goods or services when they are performed. Receiving the items this way will accelerate the payment for them, this is because it will alert the A/P department that the good or service can be paid for. Most of the goods will be received by the Warehouse, but there will goods that could be received at the campus, also services such as training, professional development, travel reimbursement and so on, can be received by the campus or department. If the good or service is not marked as “received” in Skyward the Accounts Payable Department will need proof of the acquisition of the good or service before making a payment, this will delay the payment of that good or service as it takes time to confirm the receipt.

### Step 1: Going to the right screen

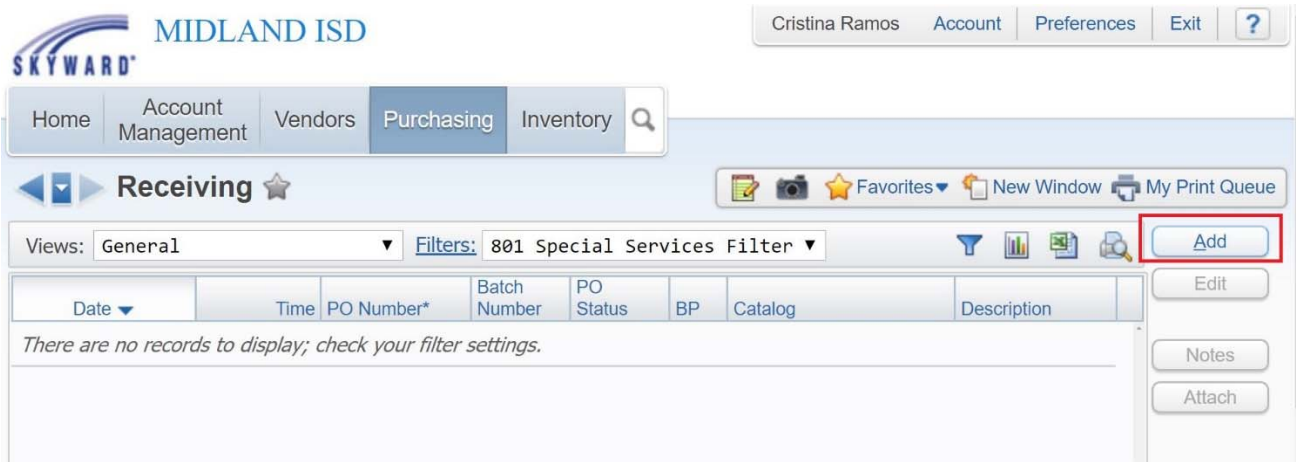
The screen that must be accessed is the “Receiving-RC” screen, this screen can be accessed in the following path: Business Live Database -> Financial Management Module -> Purchasing -> Purchase Order Receiving -PR -> Receiving –RC. See screenshot below:



The screenshot shows the Skyward software interface. The top navigation bar includes 'Home', 'Account Management', 'Vendors', 'Purchasing' (highlighted in yellow), and 'Inventory'. Below this, there are three main sections: 'Purchasing - PU', 'My Requisition Processing - MR', and 'Purchase Order Receiving - PR'. The 'Purchase Order Receiving - PR' section is expanded, showing 'Receiving - RC' (highlighted in yellow) and 'Reports - RE'. On the right side, there is a list of links including 'Requisitions', 'My Requisitions', 'View My Purchase Orders', 'Submit Transfers', 'Vendor Browse', and 'Purchasing Activity'.

## Step 2: Add a receipt of good or service

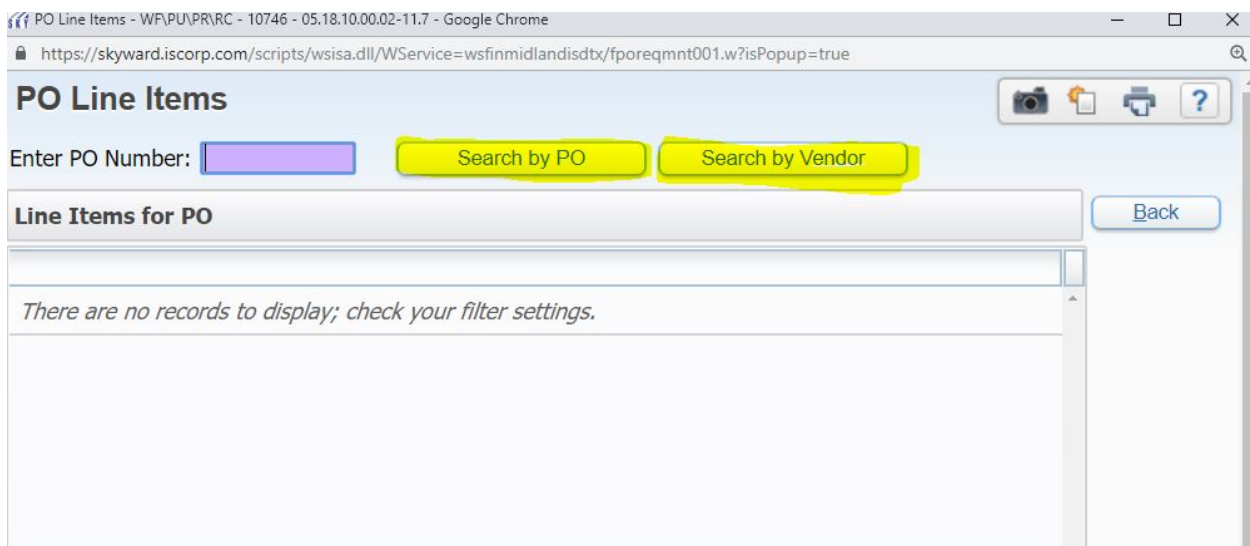
Once the “Receiving-RC” button is clicked, the screen below will appear. This screen will show you the purchase orders that you can receive. **Make sure your filter is set to the name of your department.** As an example in the image below, the “Special Services Filter” is set below. If you do not have a filter available, then email to Arturo Valenzuela at [arturo.valenzuela@midlandisd.net](mailto:arturo.valenzuela@midlandisd.net) so he can set that filter for you. You can also set the filter yourself if needed. To add a receipt, click “Add” as shown in the image below:



The screenshot shows the Skyward MISP interface. At the top, there's a header with the Midland ISD logo and user information (Cristina Ramos, Account, Preferences, Exit, ?). Below this is a navigation bar with tabs: Home, Account Management, Vendors, Purchasing (selected), and Inventory. A search icon is next to the tabs. Below the navigation bar is a sub-header for 'Receiving' with a star icon. To the right of 'Receiving' are icons for Favorites, New Window, and My Print Queue. Below this is a section for Views and Filters. The 'Views' dropdown is set to 'General'. The 'Filters' dropdown is set to '801 Special Services Filter'. To the right of the filters are icons for a funnel, bar chart, pie chart, and a magnifying glass. The 'Add' button is highlighted with a red box. Below the filters is a table with columns: Date, Time, PO Number\*, Batch Number, PO Status, BP, Catalog, and Description. The table is empty, and a message below it says 'There are no records to display; check your filter settings.' To the right of the table are buttons for Edit, Notes, and Attach.

## Step 3: Add a receipt of good or service

After clicking in “Add” search type the Purchase Order (P.O.) number or Vendor name in the search box and click either of the boxed highlighted in yellow in the screenshot below:



The screenshot shows the Skyward MISP 'PO Line Items' search screen. At the top, there's a header with the Skyward logo and user information. Below this is a section for 'PO Line Items'. There's a search bar with the text 'Enter PO Number:'. To the right of the search bar are two buttons: 'Search by PO' and 'Search by Vendor', both highlighted in yellow. Below the search bar is a section for 'Line Items for PO'. The section is empty, and a message below it says 'There are no records to display; check your filter settings.' To the right of the section is a 'Back' button.



**Step 4: Select the P.O. you will want to receive**

Once you find the P.O. you want to receive, select it and key in the number or items you will like to receive. If you cannot find the P.O., please check for the correct P.O. number or make sure this items has not been paid for already. Once in the screen below, you can either type in the amount of items received or click the button, “receive all” in order to receive all items.

**PO Line Items**

Enter PO Number:

**Line Items for PO**

Qty Ordered	Prev Received	Qty Received	Qty Remaining	Comment
1	0	0	1	

Once the item is received, the software will move you back to the receiving screen where you will be able to see all of the P.O.s that have been received. If you do not have access to the proper P.O. group or buttons to receive items and you belong to one of the groups mentioned at the beginning of this manual, please contact Arturo Valenzuela at [arturo.valenzuela@midlandisd.net](mailto:arturo.valenzuela@midlandisd.net).

**Step 5: Forward the invoice to the proper department**

If you have an invoice, please send it to the following email address: [misdinvoices@midlandisd.net](mailto:misdinvoices@midlandisd.net) . This is important because you might be the only person that has that invoice, if the vendor is sophisticated enough, the vendor will know to send the invoices to [misdinvoices@midlandisd.net](mailto:misdinvoices@midlandisd.net) . For safe practices, please forward all invoices you come across to the mentioned email address.