

Product Management

Products Received

When product shows up (or you pick it up), you need to make sure and receive it into the system. This is how your inventory is accurately tracked. There are three ways to receive products in this module. (There is a fourth method to receive products automatically if you do a “BuyOut” during a sale, which generates a PO and marks the product as received all at once. That is covered in the Sales Order section.)

Receive by Product

The Receive by Product method is handy if you have the product, but are not sure of the PO number it was ordered on. It's also useful if you want to ensure that product is being scanned with the barcode scanner or manually entered rather than just confirming counts of product when receiving. You can do this for several products at once, if you wish.

Go to PRODUCT MANAGMENT > PRODUCTS RECEIVED > RECEIVE BY PRODUCT

Receive by Product

Save Exit Sort Save As Pending

Scan PO Items for PO# :

Search Using PO #

No already scanned barcode found.

Receipt Number # : 8201

Prior to receiving by product you have a couple of options available that can be helpful.

Scan PO Items for PO# - if you have products that may be on multiple Purchase Orders and have a default PO # that you want to assign them to, put that PO# here. This can be useful for receiving by PO#, but using the barcode scanner.

Search Using PO# - this simply takes you to the Receive by PO# screen.

Receipt Number #: Fuse5 will automatically assign a unique numeric receipt number. You can override this with your own unique receipt number if you wish. This can come in very handy if need to reconcile receiving during Vendor Invoice Reconciliation. You can put something like the Vendor Invoice # in here to match it up later. Any combination of numbers and characters will work. To access your list of

“Receipt Numbers” go to PRODUCT MANAGEMENT > PRODUCTS RECEIVED. Once on the Products Received Listing Page you will see the receipt number as one of the columns available.

Products Received

Line Code

☐ Exact match ☒ Begins With

KLMNOPQR

	PO Number	Receipt Number
	P1-28774	inv12345 FMC
	P1-28770	8186
	P1-28770	8186
	P1-28770	8185
	P1-28770	8185
	P1-28770	8185





There is also a custom setting that allows you to manage receipt numbers called **Default receipt # to blank, and require user to enter receipt # during receiving** - Setting this option to 'ON' will result Blank textbox available for 'Receipt Number #' on 'Receive by PO Number' and 'Receive by Product (PO)' page. Setting this option to 'OFF' will result generate system number automatically for 'Receipt Number #' on 'Receive by PO Number' and 'Receive by Product (PO)' page.

Moving back to the receive by product page.....Once on this screen you can simply start entering product by product number (in the Vendor Product # column) or you can use the barcode scanner to scan product which will then populate on the receiving page. When using the product number, you will get a drop down for product # and LINE codes if there are multiple to select from.

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Product Details

- If the line item is orange, you may double-click to Validate the line.
- Use ENTER, UP/DOWN key to move from one qty field to the next.
- Click on PO Cost Price or PO Core Price to make it editable.

Action		Barcode #	Vendor Line Code	Vendor Product #	Our Line Code	Our Product #	Received Qty
		<input type="text"/>	DCC	1971	DCC	1971	1
		<input type="text"/>	CRO	1971	CRO	1971	1

You will notice that when using the barcode scanner one additional unit of “Received Qty” will populate each time you scan a product and it will increase the “Received Qty” if it's the same product as a previous line.

- Note: if you are having difficulty getting a product to populate using the bar code scanner, check the product file and ensure that they “Unit Barcode” field is set to “1”. Some products do not set a qty and therefore have trouble when being scanned with the bar code.

Purchase UOM	PO Number For Receiving Quantity					
1 EACH	PO Number	Qty Remaining	Qty Receiving	PO Cost Price	PO Core Price	Related SO
	P1-28657	1	<input type="text"/>	22.00 \$ 	0.000	S1-131807
	P1-28748	1	<input type="text"/>	22.00 \$ 	0.000	
	<div> <div>Create PO</div> <div>Append to PO</div> </div>					
1 EACH	<div> <div>Create PO</div> <div>Append to PO</div> </div>					

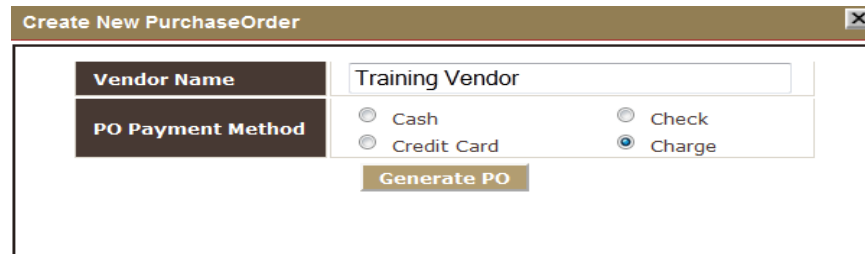
As you enter products to the receiving screen, the Purchase UOM (unit of measure) will automatically populate based off the product record. If there is only one PO number that the product may be coming in on it will automatically populate as well. If a product could be on multiple Purchase Orders, you will have to enter a Qty Received for whichever PO you want to assign this product too (you may have

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to double click on it in the orange background area).

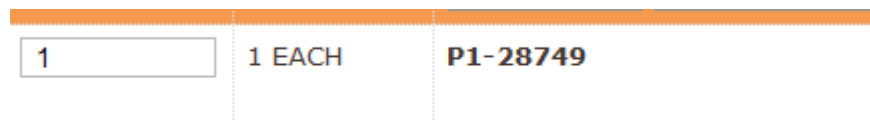
While receiving product you also have the ability to create or append to a PO. This ability is intended to allow you to easily receive product that may have been purchased with a phone call without a formal PO, or that was added onto an existing PO to expedite the process.

The second product in the example did NOT show up as belonging to any PO. At this point you must choose to either CREATE PO or APPEND TO PO. When using the CREATE PO.....



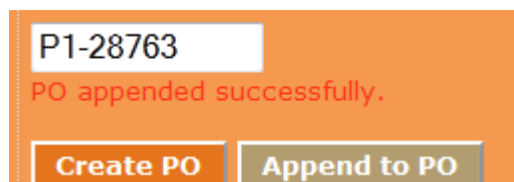
The screenshot shows a dialog box titled "Create New PurchaseOrder". It contains two main sections: "Vendor Name" with a text input field containing "Training Vendor", and "PO Payment Method" with three radio button options: "Cash", "Credit Card", and "Charge". The "Charge" option is selected. Below these options is a "Generate PO" button.

You will be prompted to enter the vendor name and choose a PO Payment Method. Once you have done this a PO number will populate on the receiving page.....



1	1 EACH	P1-28749
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If you choose to APPEND TO PO you are prompted to simply type in the PO number you want to add the product too.



The screenshot shows a dialog box with an orange background. It contains a text input field with "P1-28763" and a message "PO appended successfully." in red text. Below the input field are two buttons: "Create PO" and "Append to PO".

Once you have established which PO each product is to be assigned to, you will see that the PO Cost Price as well as PO Core Price will populate. This price comes from the product record field that you have established as the pricing line item for the particular vendor from which the PO was created for.

Related SO – Related Sales Orders – when receiving the Related SO column will populate sales order numbers for any products received that were Buy Outs. If a product was on Backorder you will not see a sales order number, rather just the word backorder. Either of these should prompt the person doing receiving to do something with that product. It has either been sold or is waiting to be sold.

Delete any non-used product lines.

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Print Product Labels- Fuse5 can now print out labels for products when you are receiving by PO or by Product Number. Products that have a barcode will print the barcode onto your label. When printing labels, a pop up window will allow you to choose which box on your label sheet to start printing in so that you don't waste labels when not printing a whole sheet. You can print on Avery 5160, 5161 or 5162 label sheets. When receiving, just check the box in the far right column of each product you want to print labels for and Fuse5 will print out as many labels as the quantity received for each product selected.

Print Labels	
Related SO	Print Labels
	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>
S1-131471	<input checked="" type="checkbox"/>

Print Labels

Choose either all products or individually select the products you would like labels for.

Custom Print Labels

Enter Which Box # To Start Print Labels:

1

1	2	3
4	5	6
7	8	9
etc.		
...		
25	26	27
28	29	30

Note : You can enter number less than or equal to 30

Label Type

5160

Rename :

5160

Label's

Width :

2.63

in,

Height :

1

in

Margin From

Top :

0

in,

Right :

0

in,

Bottom :

0

in,

Left :

0.19

in

Table Width

0

px,

Column's Gap

0.12

in

Table Border

0

1 = border print,

0 = border not print

(use for printing test only)

Print

Cancel

Choose which label you want to start with in upper half of the selection box. Choose the label type with the drop down. The measurement data will automatically populate based on the type of label you have chosen. Finally, choose whether or not you want borders around each label. (Note: If you do NOT want borders on the labels, ensure you change the Table Borders selection to 0 (ZERO)).

Once you are done entering products you need to delete the last empty line (by hitting the trash bin on the left) and click "Validate Product Lines".

Hit the Validate Product Lines button. This let's Fuse5 know that you are ok with all the product on the receiving document.

Once you have validated the parts that you have received, you have a few options to finish your receiving.

Save

Exit

Sort

Save As Pending



Print 'Put It Away Doc'



Print Receipt

Save – This will save the receiving activity and add the parts to your inventory. No documentation is printed.

If you check either PRINT PUT IT AWAY DOC or PRINT RECEIPT prior to hitting save you will have the following documents print off.

Put it Away Doc

Put It Away Doc - Receipt# : 78

Linecode	Product Number	Zone	Shelf	Bin	Qty Received
MOT	FD4615	D	41		2
MOT	FG986B				2
MOT	FL1A	D	41		24
MOT	FL2017B	D	41		22

Receipt

Receipt# : 78

PO Number	Linecode	Product Number	Zone	Shelf	Bin	Related SO Number	Qty Received	Core Cost	Cost	Core Ext.	Cost Ext.	Total Line
P1156	MOT	FD4615	D	41			2	\$0.00	\$46.05	\$0.00	\$92.10	\$92.10
P1156	MOT	FG986B					2	\$0.00	\$6.62	\$0.00	\$13.24	\$13.24
P1156	MOT	FL1A	D	41			24	\$0.00	\$2.67	\$0.00	\$64.08	\$64.08
P1156	MOT	FL2017B	D	41			22	\$0.00	\$3.89	\$0.00	\$85.58	\$85.58
P1156	MOT	FL2051S	D	41			23	\$0.00	\$11.03	\$0.00	\$253.69	\$253.69
P1156	MOT	FL400S	D	41			5	\$0.00	\$2.67	\$0.00	\$13.35	\$13.35

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Exit – This will cause you to leave the receiving activity and not save any changes. Essentially, you are telling Fuse5 to ignore the work you have done in receiving.

Sort – This will sort the parts on the receiving interface by part #.

Save As Pending – This will put the receiving in pending status and make it available for future work under PRODUCT MANAGEMENT > PRODUCTS RECEIVED > PENDING PRODUCTS RECEIVED. More details about accessing and continuing work on pending receipts are included later in this training document.

Fuse5 will now check for outstanding quantities on purchase orders and take the appropriate action.

Receive by Purchase Order Number

The Receive by Purchase Order Number method is the quickest way to receive all the parts from a single vendor order. Instead of typing in the part number, you type in your PO number (usually somewhere on the shipping documents) that the order was placed on. To access this module go to PRODUCT MANAGEMENT > PRODUCTS RECEIVED > RECEIVE BY PURCHASE ORDER NUMBER.

Prior to receiving by product you have a couple of options available that can be helpful.

Receive by PO Number

Save Exit Sort Save As Pending Clear

PO number and Location Information

Enter PO # : Get Product Current Location :

Receipt Number # : ?

Clear – once you have selected a PO# and populated the receiving document Fuse5 defaults to show you the received Qty as the same quantity ordered on the PO. If you would prefer you can CLEAR these quantities out to zero and add quantity based on your physical count.

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Search Using Barcode # - this simply takes you to the Receive by Product.

Receipt Number #: Fuse5 will automatically assign a unique numeric receipt number. You can override this with your own unique receipt number if you wish. This can come in very handy if need to reconcile receiving during Vendor Invoice Reconciliation. You can put something like the Vendor Invoice # in here to match it up later. Any combination of numbers and characters will work. To access your list of “Receipt Numbers” go to **PRODUCT MANAGEMENT > PRODUCTS RECEIVED**. Once on the Products Received Listing Page you will see the receipt number as one of the columns available. (same as when receiving by product).

After entering the PO number, hit the GET PRODUCT button. This will pull up a list of all the products on that PO and allow you to receive them all at once, or partially if there are missing items. If there are missing items, just adjust the Received Qty to what was actually received and the person who reconciles the PO will have to decide what to do about it.

PO number and Location Information

Enter PO # :

Product Details

- If the line item is orange, you may double-click to Validate the line.
- Use ENTER, UP/DOWN key to move from one qty field to the next.
- Click on PO Cost Price or PO Core Price to make it editable.

Delete	<input type="checkbox"/>	Barcode #	Vendor Line Code	Vendor Product #	Our Line Code	Our Product #	Received Qty
	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="BEA"/>	<input type="text" value="5"/>	<input type="text" value="BEA"/>	<input type="text" value="5"/>	<input type="text" value="2"/>
	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="CRO"/>	<input type="text" value="1972"/>	<input type="text" value="CRO"/>	<input type="text" value="1972"/>	<input type="text" value="4"/>
	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="DCC"/>	<input type="text" value="1971a"/>	<input type="text" value="DCC"/>	<input type="text" value="1971a"/>	<input type="text" value="4"/>
	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="DCC"/>	<input type="text" value="1971b"/>	<input type="text" value="DCC"/>	<input type="text" value="1971b"/>	<input type="text" value="3"/>
	<input type="checkbox"/>	<input type="text" value="611269995563"/>	<input type="text" value="DCC"/>	<input type="text" value="1981"/>	<input type="text" value="DCC"/>	<input type="text" value="1981"/>	<input type="text" value="5"/>

Note: When you ENTER PO # in the box at the top left, be aware that punctuation DOES matter. “P128539” is not the same as “P1-28539”.

Everything else on the Receive by PO Number screen is similar to the receive by product. Purchase UOM, PO Number for Receiving Quantity, PO Cost Price, Related SO, and Print Labels functionality

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is the same as when receiving by product.

Purchase UOM	PO Number For Receiving Quantity	PO Cost Price	PO Core Price	Related SO	Print Labels
1 EACH	P1-28760	25.00 \$	0.000		<input type="checkbox"/>
1 EACH	P1-28760	200.00 \$	0.000	BACKORDER	<input type="checkbox"/>
1 EACH	P1-28760	33.00 \$	0.000		<input type="checkbox"/>
1 EACH	P1-28760	49.50 \$	0.000		<input type="checkbox"/>
1 EACH	P1-28760	34.00 \$	0.000		<input type="checkbox"/>

Once you have confirmed which products have been received (either all or some), hit the **VALIDATE PRODUCT LINES** button at bottom left.

After that, hit the save button.

If you only received some of the parts on the PO, you will be prompted with a pop up window that asks if you want to Backorder or Cancel from PO. You have access to the Line Code, Product Number, Qty Ordered, and Qty Received. Fuse5 is asking you to decide whether to Backorder or Cancel the product from the PO if it was not received. If you backorder, the PO will remain open in Partially Received status. If you cancel from PO, then the PO will be closed in Fully Received status. You can select items either individually or as a group using the Back Order All or Cancel All from PO buttons.

Partially Received PO Listing

Line Code	Product Number	Qty Ordered	Qty Received	Action
PO Number : P1-28760		BACK ORDER ALL <input type="checkbox"/> CANCEL ALL FROM PO <input type="checkbox"/>		
BEA	5	2	1.00	<input checked="" type="radio"/> Backorder <input type="radio"/> Cancel from PO
CRO	1972	4	3.00	<input checked="" type="radio"/> Backorder <input type="radio"/> Cancel from PO
DCC	1971a	4	3.00	<input checked="" type="radio"/> Backorder <input type="radio"/> Cancel from PO
DCC	1971b	3	2.00	<input checked="" type="radio"/> Backorder <input type="radio"/> Cancel from PO
DCC	1981	5	4.00	<input checked="" type="radio"/> Backorder <input type="radio"/> Cancel from PO

FIRE IT UP!

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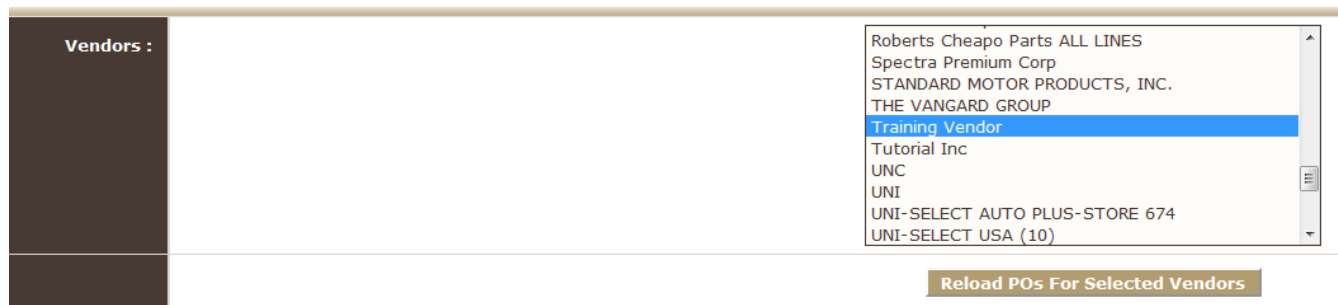
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When you have received products with either the Product Numbers or the PO Numbers, the status on the Purchase Order main screen (PRODUCT MANAGEMENT / PURCHASE ORDERS) will change from “Finalized” to “Order Partially Received” or “Order Received in Full” if the entire order is completely received.

Receive by Purchase Order Reconciliation

To get there go to (Product Management > Purchase Orders > Purchase Order Reconciliation)

1. Choose the appropriate vendor from the list. (only vendors with open Purchase Orders will be available).



Vendors :

- Roberts Cheapo Parts ALL LINES
- Spectra Premium Corp
- STANDARD MOTOR PRODUCTS, INC.
- THE VANGARD GROUP
- Training Vendor**
- Tutorial Inc
- UNC
- UNI
- UNI-SELECT AUTO PLUS-STORE 674
- UNI-SELECT USA (10)

Reload POs For Selected Vendors

2. Find the PO # you are looking for at bottom left and hit the corresponding drop down box on the right.



Training Vendor

» P1-28657 - 02/04/2013 - Finalized

» P1-28679 - 02/08/2013 - Finalized

Line Code	Product Number	QoH	Ordered	Received	Open	Backorder	Cancelled	Cancel	Receive	Reset
DCC	2000	0	5	0	5	0	0	●	●	Reset
DCC	2001	0	5	0	5	0	0	●	●	Reset
DCC	2002	0	5	0	5	0	0	●	●	Reset

» P1-28748 - 03/04/2013 - Finalized

3. Use buttons to “cancel” or “receive” the items.
4. Hit process changes.

Using the the Purchase Order Reconciliation option will have the same impact on the status of the PO as using received by product or PO number, however the status will be listed as fully reconciled rather than received in full.

Purchase order reconciliation allows you to track the progress of purchase orders that have been placed. The final state of a PO to a vendor is “Order Received in Full”. There are two ways to get to this state. One is to receive ALL of the parts via the “Products Received” module. The other is to reconcile the order in Purchase Order Reconciliation by either receiving or canceling the PO. You can cancel either an entire PO, or just cancel what is left to be received (which still results in an “Order Received in Full” status).

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If you receive the product, Fuse5 will increment the QoH and mark the product as received just as if you had received it in the receiving module.

Track Return Purchase Orders using the Purchase Order Reconciliation Module

When you process a return PO in Fuse5 and you are integrated with financial software (such as Quickbooks), entries will be immediately in regards to the transaction (namely you expect the vendor to pay you money for the parts). If you have instances where your vendor doesn't pay you the amount expected then it may be necessary to track your returns. You can do this in the Purchase Order Reconciliation module. If you choose to Reconcile RGNs, after picking a vendor, you can tell Fuse5 if you have Received Credit or Received Replacement parts. This allows you to maintain a list of all outstanding Return Purchase Orders that your vendor has not closed out with you, thereby allowing you to follow up and make appropriate adjustments to your financial software if necessary.

Choose the vendor and select Reconcile RGNs

The screenshot shows the 'Purchase Order Reconciliation' window. At the top, there's a title bar 'Purchase Order Reconciliation'. Below it is a section titled 'Vendors' containing a list box with the following items: 25JUNE Master Vendor, A/C, A1S, ACI (highlighted in blue), Asco Distribution Center, Bankcard Services (CC), C-H, Campbell Oil & Gas Co., Cardone Industries, Inc., and Carrier Auto Supplies. Below the list box are two radio buttons: 'Reconcile PO's' (unselected) and 'Reconcile RGN's' (selected). Below these is a button labeled 'Reload POs For Selected Vendors'.

Identify which parts you received credit for or a replacement, then click process changes. This RGN will now be removed from the Purchase Order Reconciliation Module.

The screenshot shows a table for RGN details. The table has columns: Line Code, Product Number, Ordered Qty, Received Credit, and Received Replacement. The data rows are:

Line Code	Product Number	Ordered Qty	Received Credit	Received Replacement
WIA	51515A	-1	<input checked="" type="radio"/>	<input type="radio"/>
WIX	51515	-1	<input type="radio"/>	<input checked="" type="radio"/>

Below the table are two buttons: 'PROCESS CHANGES' and 'EXIT - NO CHANGE'.

Saving your receiving activity to pending status:

Whether in the receive by product or receive by PO # module, you can save your receiving activity as

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pending at any time using the SAVE AS PENDING button at the bottom of the receiving page. To access the same receiving activity again go to **PRODUCT MANAGMENT > PRODUCTS RECEIVED > PENDING PRODUCTS RECEIVED**. At this point you will see a listings page of all receiving activities that have not been finalized. If you were receiving by PO#, the PO# will show under the Pending RM Id column. If you were receiving by product it is **NECESSARY** to either remember the date and time that you were doing the receiving or go to the Pending Products Received page when you save as pending and note the Pending RM Id. This is important to ensure you access the same Receive by Product incident when you go back to it.