

## OrderPoint Goods Receipting

Any goods / services ordered via OrderPoint must be confirmed on the system as soon as they are received. This ensures that invoices are paid on time and Vendors do not place blocks on future orders because of late payments.

Vendors should send invoices directly to Accounts Payable, Matlock but if you receive an invoice, please stamp it (see below) and promptly forward it onto Accounts Payable to ensure the payment is made:

DFE No	Eg 1234
Vendor No	
Purchase Order No	Eg 6500123123

### Goods Receipting

- Click **Purchasing**, then **Confirmation**
- Type the Purchase order number into **Search Purchase Order Number**, click **Search**

The order number will display. Clicking on the black arrow opens it to show all ordered items

- Click **Continue**

This opens the **Create Confirmation** window where you need to enter the following information (top of screen):

- **Confirmation Name** - (Vendor Name/Brief description of goods/your initials)
- **Reference Document** - the Delivery/invoice number
- **Delivery Date** – date goods received

Now, enter the goods received (full/part delivery):

- **Confirm Quantity** – (shows zero as default) enter the number of items received
- If **full** or **final delivery** has been received for the line item, check the **Last Delivery** box
- If you haven't received all the goods for a line, **DO NOT** check Last Delivery
- Click **Check** and with a successful check message
- Click **Confirm** – a confirmation number is issued
- Click **Close**

**Note:** if all/most items have been received, click **Copy All Outstanding Quantities** which populates the Confirm Quantity fields matching the Outstanding Quantities. However, you will need to tick Last Delivery for each line.

### Deleting a Confirmation

There will be times when information has been entered incorrectly or goods mistakenly confirmed as received. You can delete the confirmation

- Click on **Home** then **Shopping Area**
- Click on **Confirmations** (right hand side)
- Click **Refresh**

Your confirmations will display, per line item

- **Highlight any Confirmation line item** by clicking into the grey cell to the left, click on **Delete/Cancel**
- Click **Yes** to the Confirm delete message

The **Create Cancellation** screen will display with all details of that confirmation:

- The original Confirmation details display in **Name of Cancellation** field.  
Add a brief reason for cancellation here, if required
- The delivery note/invoice number displays in the **Reference Document**
- Click **Check** – with a successful check message
- Click **Confirm** – confirmation of the cancellation displays

You can now re-receipt the order correctly.

## Returning Confirmed Delivered Items

When you have goods receipted items but then have to return them eg they are damaged, you need to create a return delivery confirmation in OrderPoint.

**\*\*REMEMBER\*\*** You will need to contact the Vendor personally to request the returned goods are collected and also to request that a credit note be issued.

- Click **Home**, then **Shopping Area**
- Click on **Confirmations** (right hand side)
- Click **Refresh**

Your confirmations will display, per line item

- **Highlight** the relevant **Confirmation line** item by clicking into the grey cell to the left, click on **Return Delivery**

The **Display and Process Return Delivery** screen will display with all details of that confirmation.

Enter the following information:

- **Name of Return** – Vendor name/brief description why goods returned
- **Returned on** - date goods returned to Vendor
- **Reference Document Number** – if applicable
- **Return Quantity** - enter the **quantity you have returned**:
- If replacement items are to follow, **untick** the **Last Delivery** tick box
- If you will not receive replacement items, **tick** the **Last Delivery** tick box

Now, to add the reason for the return delivery:

- Click on **Details**:
- Click on the **Notes and Attachments** tab
- Click **Reason for Return Delivery**
- Click on the drop down arrow and **select** the most relevant option eg Goods Damaged
- click **Save**
- Click on **Check**
- If the check is successful, click on **Confirm** – a successful return delivery confirmation will display.

# Schools OrderPoint Goods Receipting Step by Step Guide

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