PAMS FRESH GENERATION

# Goods receipt notes

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## Goods receipt notes

A goods receipt note records products received against an incoming order before the goods move
through warehouse handling. In PAMS, the purchase flow places the goods receipt note after a
purchase order and before warehouse work. The receipt form also accepts assembly, transfer, and
delivery orders as related orders.

| If you need to… | Go to |
|---|---|
| Understand the record and its place in the flow | This section |
| Check what must be ready first | Before you start |
| Open a new note or find one already saved | Find a goods receipt note |
| Identify fields, panels, and history | Understand the receipt screen |
| Record quantities and save the note | Create and save a goods receipt note |
| Work with different incoming-order types | Handle order types and receipt branches |
| Resolve a blocked save | When saving or validating goes wrong |
| Continue with warehouse work | After the receipt is saved |
| Understand the complete warehouse sequence | Warehouse fulfillment flow |
| Record the next inspection step | Incoming inspection notes |
| Locate stock by receipt | Stock by shipment |

## Before you start

Before creating or changing a goods receipt note, have the incoming order ready and make sure your
account can create or edit the record. The selected order determines which receipt branch and
product quantities you work with.

**Prerequisites**

- Know the incoming order you are receiving. The **Related order no.** field groups orders as
  **P.O.s**, **Assmbly orders**, **Transfer orders**, and **Delivery note**.
- Use the Warehouse area with permission to create a new record when you are creating a note.
- Use an existing receipt with editing permission when you are changing a saved note.
- The Warehouse subscription must include the receipt feature, and the page must be available.
- Keep the order in a state where the relevant action is available. Order-level **Save** requires
  an existing receipt with a new or changed order, while **Consider PO As Not Received** requires an
  existing unchanged order that is not read-only.
- Open the Warehouse receiving list to start a new note or open a saved note for editing.

## Find a goods receipt note

The receiving list brings together goods receipt notes. Start a note from the receiving-list
toolbar, or open a saved note from its row's action area.

**Prerequisites**

- You have access to the Warehouse receiving list.

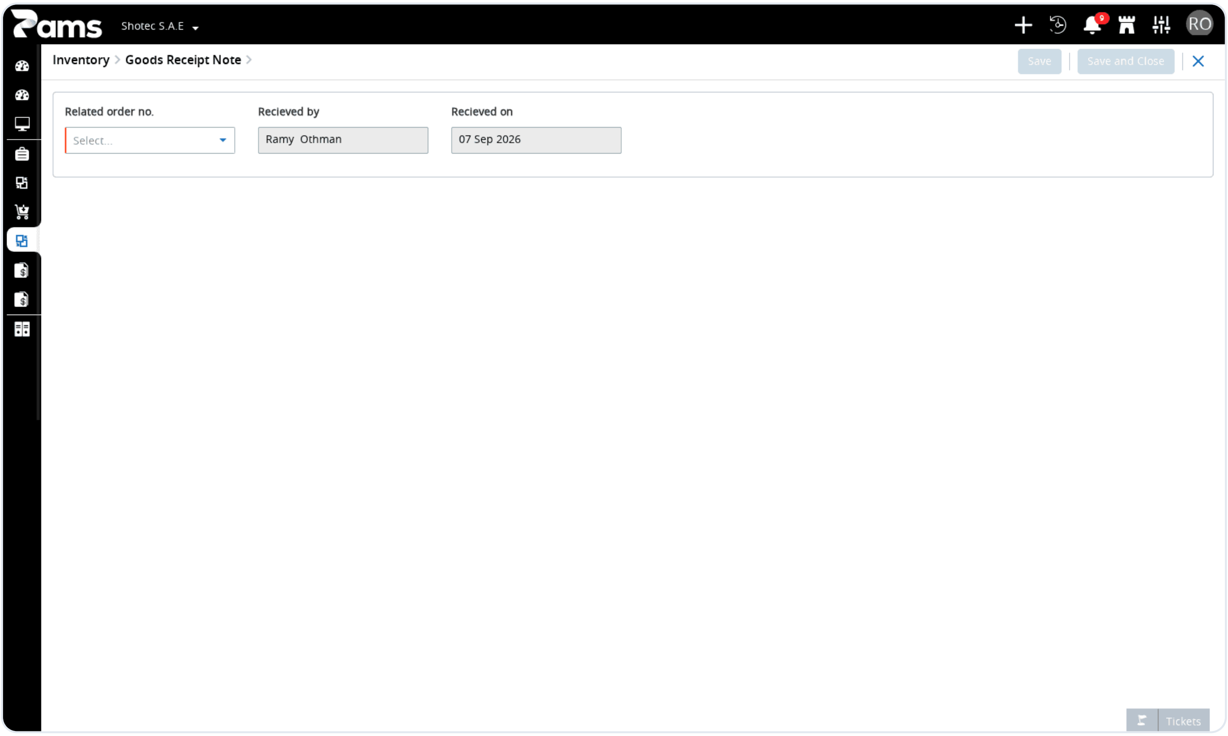
**Steps**

1. Open the Warehouse receiving list.
2. Choose the task you need:

| If you need to… | Action |
| --- | --- |
| Start a note | Select the plus icon in the receiving-list toolbar |
| Open a saved note | Open the saved note for editing from the receiving list. |

3. For a new note, select **Goods Receipt Note**.

The receiving list may show different columns. Identify a row by the headers currently shown.




**Result:** A new goods receipt form opens, or the selected saved note opens for editing.

## Understand the receipt screen

A goods receipt screen has a header for the related order and receipt information, an order panel
for the received products, and a history tab on an existing receipt.

### Header fields

| Field | What it contains | When it appears | Required marker |
| --- | --- | --- | --- |
| **Related order no.** | The incoming order selected for the receipt | On a new receipt as a field; after selection, the order number is shown in the order panel header | Yes |

| Field | What it contains | When it appears | Required marker |
|---|---|---|---|
| **Recieved by** | The responsible person | On the receipt form; the control is disabled | Yes |
| **Recieved on** | The receipt date | On the receipt form; the control is disabled and cannot be later than today | No |
| **Sub-supplier** | The supplier associated with the incoming order | For a purchase order; for a delivery order it is displayed as a disabled text field | No |
| **Sub-supplier shipment no.** | The shipment reference from the sub-supplier | For a purchase order | No |

The form does not provide a Warehouse field. The received-order panel carries the product
receipt information instead of a separate warehouse field. The screen also does not provide a
P.O. is totally received checkbox.

## Received-products grid

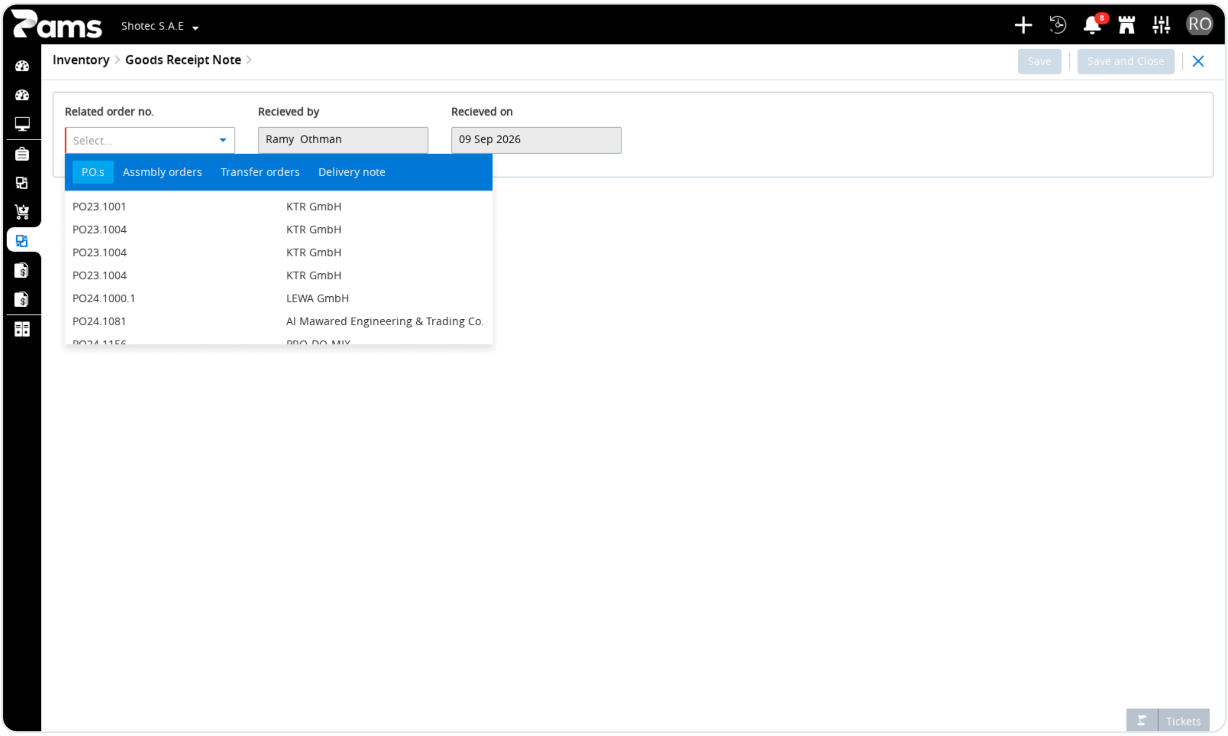
Open the order panel to work with its products. The panel body appears when the order is opened.
Its columns are:

| Column | Use |
|---|---|
| **Product** | Identify the received product |
| **Ordered Qty.** | Read the ordered quantity; the label changes with the order type |
| **Unit** | Read the product's unit |
| **Received Qty.** | Enter the quantity received while the receipt is editable |
| **Returned Qty.** | Read the returned quantity on an existing purchase, assembly, or transfer order |
| **Stocking location** | Enter the stocking location while the receipt is editable |
| **Comment** | Add a comment while the receipt is editable |

The quantity labels vary by order type. The corresponding labels include **Ordered Qty.**,

**Issued Qty.**, **Transferred Qty.**, **Received Qty.**, and **Returned Qty.**; the delivery-order label is also order-type specific.

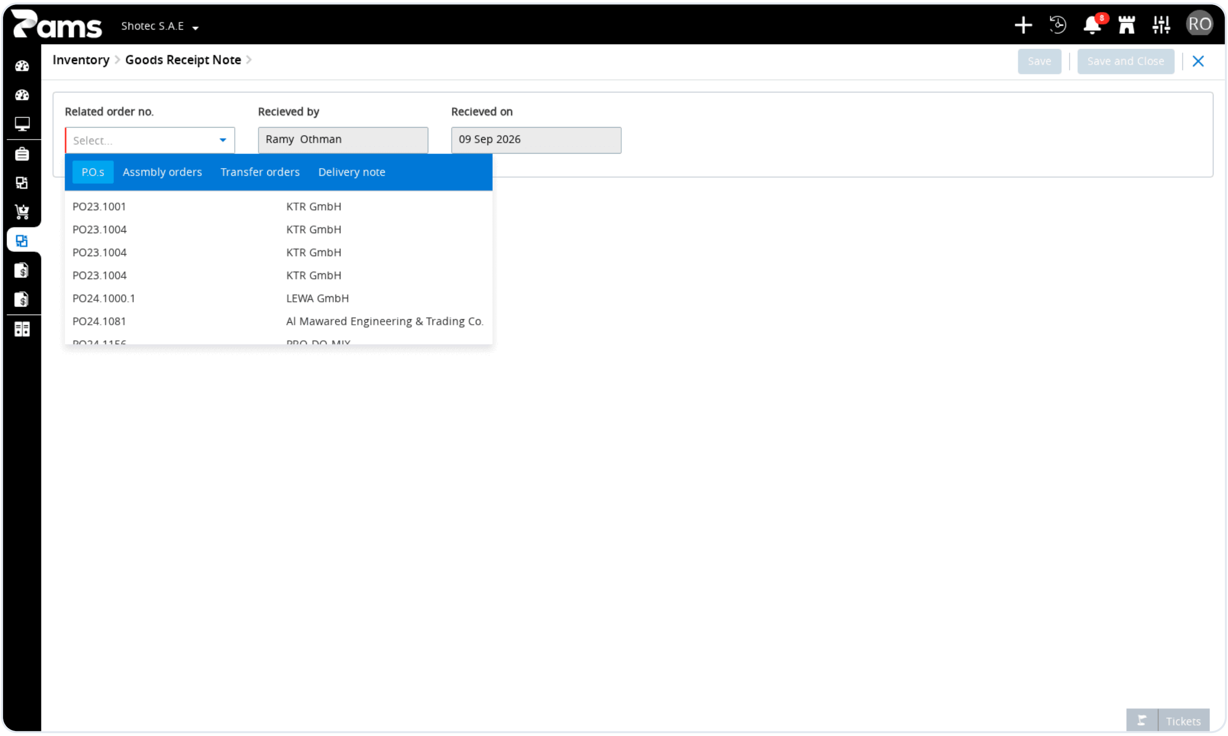
Use the rows already displayed in the received-products area. The screen does not provide an add
control, delete controls, or an action dropdown for these rows.

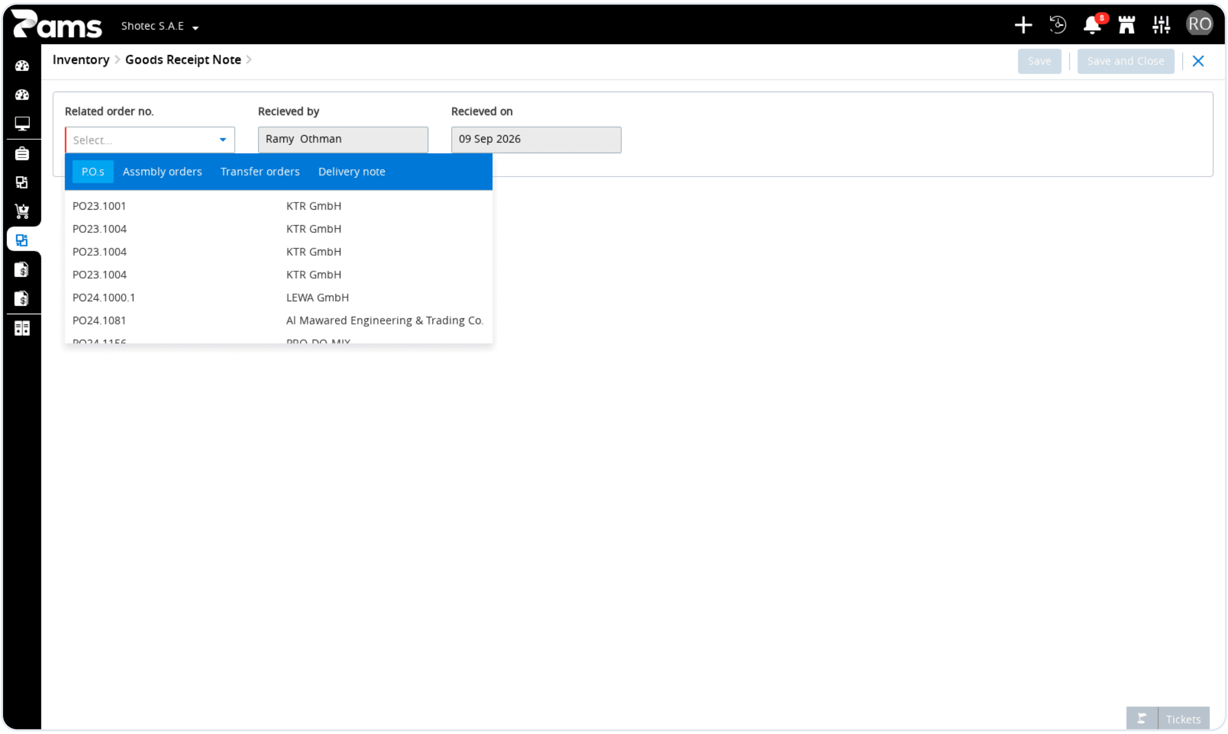



The order list displays these groups:

| If the incoming work is a… | Select from |
|---|---|
| Purchase order | **P.O.s** |
| Assembly order | **Assmbly orders** |
| Transfer order | **Transfer orders** |
| Delivery order | **Delivery note** |

On an existing receipt, use **Last Modifications** to review the record history.




## Create and save a goods receipt note

To create one, enter the received quantity for each product against the selected incoming order.
The saved receipt then provides the record for the next warehouse step.

### Prerequisites

- You are on the new goods receipt form.
- The incoming order appears in **Related order no.**.
- You know the quantity received for each product.

**Steps**

1. Select **Related order no.**.
2. Select the applicable order from the group that matches your incoming work.
3. Review **Recieved by**.
4. Review **Recieved on**.
5. Open the order panel by selecting its **Order Number** header.
6. Enter the quantity received in **Received Qty.** for each product.
7. Enter a stocking destination in **Stocking location** when the editable receipt requires it.
8. Enter a note in **Comment** when the receipt needs additional context.
9. Choose the save action that matches where you want to continue:

| Action | Result |
|---|---|
| **Save** | Remain on the saved record |
| **Save and Close** | Leave the page |

After a successful save, PAMS displays `Your request was completed successfully`. **Save** opens
the saved receipt edit page; **Save and Close** leaves the page.

**Result:** The receipt is saved, the success message appears, and the selected save choice either
opens the saved receipt or leaves the page.

## Handle order types and receipt branches

The receipt branch follows the type of incoming order. Choose the group that describes the order;
the form then presents the corresponding supplier and quantity fields.

**Prerequisites**

- The receipt has an incoming order or an existing order panel.
- For order-level actions, the receipt is saved and editable.

**Steps**

1. Choose one order type in **Related order no.**:

| If you are receiving a… | Use the group |
|---|---|
| Purchase order | **P.O.s** |
| Assembly order | **Assmbly orders** |
| Transfer order | **Transfer orders** |
| Delivery order | **Delivery note** |

2. For a purchase order, review **Sub-supplier** and **Sub-supplier shipment no.**.
3. For a delivery order, review the disabled **Sub-supplier** field.
4. Use the quantity labels shown for the selected order type: **Ordered Qty.**, **Issued Qty.**, **Transferred Qty.**, **Received Qty.**, or **Returned Qty.**; the delivery-order label is order-type specific.
5. On a new receipt with a selected order, select **Reset** to remove that order selection.
6. On an existing receipt with a new or changed order, select the order-level **Save**.
7. On an existing unchanged order that is not read-only, select **Consider PO As Not Received**.
8. When the action is available, select **Request Approval** on the receipt.

**Result:** The receipt uses the fields and quantity labels for the selected order type, or the selected order-level action is applied.

## When saving or validating goes wrong

Use the message on screen to identify what to correct before trying the save again.

| Message | Condition | Action |
|---|---|---|
| `Shipment is empty. Please enter received quantity` | The order has no received product or no received | Enter a value in **Received Qty.** for the product received, then save |

| Message | Condition | Action |
| --- | --- | --- |
| | quantity | again |
| `Received quantity is greater than order quantity` | The received quantity exceeds the order quantity | Correct **Received Qty.** so it does not exceed the ordered quantity |
| `Check mandatory field(s)` | A mandatory field has not passed validation | Return to the required field, complete it, and save again |
| `An error occurred while processing your request` | The save request returns a general error | Check the receipt values and try the save again |

After a successful save, the message is `Your request was completed successfully`.

## After the receipt is saved

A saved goods receipt note remains available as a receipt record for warehouse follow-up. Use
**Last Modifications** on an existing receipt to review its history. The wider warehouse flow places
receiving before inspection and stock handling; continue with **Incoming inspection notes** or
**Stock by shipment** for those tasks.

**Result:** You have a saved receipt to reopen from the receiving list, review through **Last**
**Modifications**, or continue through the next warehouse task.

## Out of scope messages

The following messages belong to other record surfaces and are not goods receipt note messages.

| Message | Owning surface |
| --- | --- |
| `Amendment order deleted successfully` | Amendment-order page |