Receiving in UGAmart Quick Reference Guide

## *Receiving and Returning Items in UGAmart*

This document provides a quick look at procedures for documenting receipt and return of goods purchased through UGAmart.

Locating the Purchase Order

- From the UGAmart homepage, enter the PO No. in the search box at the top of the menu.
- Click the lookup magnifying glass.

- Search results listed under Document are followed by a description; look for "Purchase Orders."
- Click to select the PO you are looking for.
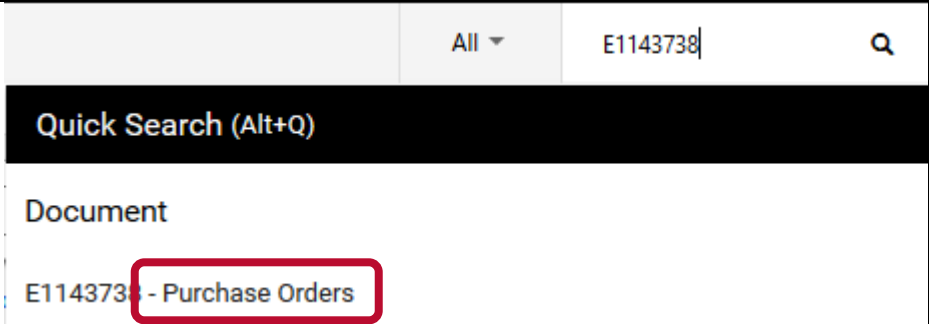
- A copy of the PO is displayed as seen below.
- Open the Available Actions dropdown menu and select Create Quantity Receipt.
- Click the **Go** button once selected.

Orders ▸ Search ▸ Search Documents ▸ Status - PO E1143738

‹ Back to Results   1 of 3 Results ▾ ‹ ›

PO/Reference No.   **E1143738 Revision 0**   Available Actions Add Comment ▾ Go
Vendor   **DELL MARKETING LP**

Status | Purchase Order | Revisions | PO Approvals | Shipments | Receipts | Invoices | Comments | Attachments | History

General Information

PO/Reference No.	**E1143738**
Revision No.	0
Vendor Name	DELL MARKETING LP more info...
Purchase Order Date	4/30/2020
Total	1,105.27
Name of Cart Initiator	Wayne Harvester
Owner Phone	+1 770-228-7284
Owner Email	
Requisition Number	print

Document Status

A/P status	Open
Workflow	✓ Completed (4/30/2020 4:58 PM)
Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
	cXML (Electronic Integration)
Distribution Date/Time	4/30/2020 4:58 PM
Vendor	Sent To Vendor view

Available Actions dropdown:
- Add Comment
- Add Notes to History
- **Create Quantity Receipt**
- Create Cost Receipt
- Print Fax Version

Line Item Status

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Vendor	Receiving	Invoicing	Matching
1	Dell Wireless Keyboard and Mouse - KM636 ⬦ more info...	580-ADTY	EA	36.99	1 EA	36.99 USD	Sent To Vendor	Fully Received	Fully Invoiced	Fully Matched
2	Base;Latitude 5300 BTX Base ⬦ more info...	210-ARYC	EA	1,068.28	1 EA	1,068.28 USD	Sent To Vendor	Fully Received	Fully Invoiced	Fully Matched

Shipping and Handling charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals. If the vendor quoted shipping and handling, then the invoice cannot exceed the quote. Vendors that offer free shipping do so at the standard ground service level and this does not include things like: dry ice, hazmat, overnight, or other express shipping options. These and other special handling requirements require additional charges.

Subtotal	**1,105.27**
Shipping	0.00
Handling	0.00
Total	**1,105.27 USD**

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Updating Header Information

- The header information will need updating with delivery and packing slip information.
- The **Receipt Date** needs to be updated to reflect the date the goods were physically received.

Exact Match: PO No. E1143738

Received Goods

- The Quantity received defaults to the items not yet received and needs updating to reflect the number of items received.
  - Enter the actual number of items received even if this does not fulfill the ordered amount.
  - Note: A 0 quantity line item is not allowed and should be removed.

- Once all line item quantities are updated, click the **Save Updates** button in the upper right corner.
- Click the **Complete** button in the upper right corner once all the need information is entered.

Receive & Return and Canceled Goods

Items not received and retained by UGA need to be documented. Such items are:
  - Received and returned at the time of delivery
  - Canceled prior to delivery
- PO lines for unreceived items should be removed from the receipt using the **Remove Line** button.

- Once all line item quantities are updated, click the **Save Updates** button in the upper right corner.

Returned Items

Returned goods arrive and are received in UGAmart. It is later determined that all or part of the items need to be returned. To return items received in UGAmart:

- Create a second Quantity Receipt as per instructions in the Locating the Purchase Order section.
- Enter a negative amount in the **Quantity** field of the PO line(s) for items being returned.
- Remove any additional PO line(s) not containing items marked for return.

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity
E1143712 🖨	1	GN82 MIC Cards	413439	5 BX	R1164575 🖨	-5

- Click the `Save Updates` & `Complete` buttons.

Additional Information

- Things to remember:
  - Changes are not included to the Quantity Receipt until you click the `Save Updates` button.
  - You can use the `Save Updates` button after any change.
  - The Quantity Receipt is not submitted until you click the `Complete` button.

- If you have questions, please contact the OneSource Service Desk at 706-542-0202 (option 2) or at onesource@uga.edu.