



# STEPHEN F. AUSTIN STATE UNIVERSITY

## Purchase Order Receiving Manual

### Purchase Order Receiving

Receiving information is to be submitted to Procurement via electronic submission of the 'Receiving Form for Purchase Orders'. The Receiving Form is used to report goods and services received by your department. Submitting the receiving form attests that the goods or services were received and it is okay for Accounts Payable to make payment. Quantities reported as received on the Receiving Form will be verified and entered into Banner by the Receiving Department.

- ❖ The receiving form is located in Online Services (Self Service Banner)  
**mySFA → Resources tab → Procurement Services → Receiving Form for Purchase Orders**

Only employees with security to submit receiving will have access to the Receiving Form.

The screenshot shows the mySFA website interface. At the top, there is a purple header with the Stephen F. Austin State University logo and name on the left, and the mySFA logo on the right. Below the header is a navigation bar with tabs for HOME, EMPLOYEE, RESOURCES, WORKFLOW, BUDGET & FINANCE, and RESEARCH. The RESOURCES tab is selected, and a sub-menu shows 'mySFA' and 'Resources'. The main content area is a grid of service categories, each with a purple header and a list of links:

- COURSE EVALUATIONS AND SURVEYS**
- DINING SERVICES**
  - [Faculty/Staff Meal Plans – Signup or Change](#)
  - [View Meal Plan Balance & Purchase History](#)
  - [Purchase Additional Dining Dollars](#)
  - [View Dining Dollars Balance & Purchase History](#)
- INSTITUTIONAL EFFECTIVENESS AND ASSESSMENT**
  - [Nuventive Improve](#)
- SPACE SCHEDULING AND UTILIZATION**
  - [Astra Schedule](#)
  - [Platinum Analytics](#)
- PRINTING SERVICES**
  - Online ordering and delivery for your printing and graphic design needs
  - [Printing Services](#)
- TECHNICAL SERVICES AND EMAIL LISTS**
  - [Technical Support Portal](#)
  - [Self-Service Banner](#)
  - [Standard Email Lists](#)
  - [Emails Sent to Admitted Students](#)
  - [Faculty/Staff Directory](#)
- TRAVEL**
  - [Travel](#)
  - [Travel Guidelines](#)
- PROCUREMENT SERVICES**
  - [P-Card Records Portal](#)
  - [Receiving Form for Purchase Orders](#)

- ✓ Enter the Purchase Order (PO) number to begin the receiving process
- ✓ Click **NEXT**

### Receiving Form for Purchase Orders

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Purchase Order:

NEXT

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Receiving | 936-468-4273 | [Email](#)

- ✓ The Receiving Form will open in a new window and will display PO information from the Banner tables for reference to assist in the receiving form submission

## Stephen F. Austin State University

### RECEIVING FORM FOR PURCHASE ORDERS

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**PURCHASE ORDER INFORMATION:**

<b>Vendor:</b> Wilton's Office Works Ltd, <b>Dept:</b> English and Creative Writing	<b>PO#:</b> P1904200
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**RECEIVER INFORMATION:**

<b>Name:</b> Smith, Suzy <b>Dept:</b> English and Creative Writing	<b>Date:</b> 04/04/2019
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**RECEIVING INFORMATION FOR ABOVE PO#:**

Enter the quantities to be received **OR** check the box to Receive All or Un-receive items (provide additional details).

Receive All remaining items below with Qty Remaining  
 Un-Receive items below with zero Qty Remaining

PO Item	Comm	U/M	Qty Ordered	Qty Received To Date	Qty Remaining	Qty Received
1	FURNITURE, NOT OTHERWISE CLASSIFIED	EA	2	0	2	<input style="width: 50px;" type="text"/>
2	FURNITURE, NOT OTHERWISE CLASSIFIED	EA	2	0	2	<input style="width: 50px;" type="text"/>
3	INSTALLATION SERVICES, (NOT OTHERWISE CLASSIFIED)	SRV	1	0	1	<input style="width: 50px;" type="text"/>

ADDITIONAL INFORMATION (package conditions, invoice numbers, etc.)

Submit Form
Reset Form

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Enter quantities in the **QTY Received** field by using one of the following methods:

- ✓ **RECEIVE only certain quantities** for specific PO items
  - **PO's with a few line items**
    - Enter **QTY Received** for each item to be received
  - **PO's with many line items**
    - Click the **Receive All** box to auto-populate the **QTY Received** field with the quantities remaining
    - Un-click the **Receive All** box to allow the prefilled quantities to be edited
    - Make the necessary changes to reflect the actual quantities to be received
    - **Verify** carefully that the quantities marked as received are accurate
  - **NOTE:**
    - Items with 0 (zero) QTY Remaining cannot be received
    - A negative quantity can be entered to un-receive an item
      - an explanation **must** be entered in 'Additional Information'
      - quantities un-received may not exceed **QTY Received to Date**
  
- ✓ **RECEIVE all items on PO:** Indicates that **everything**, or everything remaining, on the PO has been received by the department and is OK to pay
  - \*Do not use for standing orders
    - Click the '**Receive All remaining items below**' box
      - **QTY Received** will auto-populate with the QTY Remaining value
  
- ✓ **UN-RECEIVE** items on a PO
  - Click the '**Un-Receive items below**' box
    - Un-receiving allows updates to 0 (zero) **QTY Remaining** field
    - Quantity entered must be a negative number (ex. -2)
    - Consult the Receiving Department before submitting un-receiving
    - An explanation **must** be entered in the 'Additional Information' box
    - Quantities un-received may not exceed **QTY Received to Date**

**ADDITIONAL INFORMATION:** Use this field to enter package conditions, invoice numbers, or other information needed for reference

- Detailed information regarding damaged goods or wrong items should be emailed to the Receiving Department
- The Receiving Department can assist with resolving issues with the vendor [receiving@sfasu.edu](mailto:receiving@sfasu.edu)

**RESET FORM:** If needed, use to clear the inputs from the form for quantities that may have been entered in error

✓ **SUBMIT FORM TO PURCHASING**

- Click **Submit Form**
  - A summary of the submitted receiving form is emailed to the person submitting the form
  - The form is **submitted to the Receiving Department**
    - the information submitted is verified
    - the Receiving Department makes the receiving entry in Banner
    - Accounts Payable is notified when Banner has been updated
- **Department Responsibilities after submitting the form**
  - Invoices, reimbursement receipts, payment instructions, or other payment information should be emailed directly to Accounts Payable [accountspayable@sfasu.edu](mailto:accountspayable@sfasu.edu)
  - Forward the summary email to the PI/PD (Principal Investigator/Project Director) if a grant funded contract is involved

### Receiving Form Submitted

The Receiving Form for PO# P1900013 has been successfully submitted to the Receiving Department.

Quantities reported as received on the Receiving Form will be verified and entered into Banner by the Receiving Department.

A summary of your submission with additional instructions has been emailed to [suziesmith@sfasu.edu](mailto:suziesmith@sfasu.edu).

*Additional options:*

*[Submit additional Receiving Form for a different Purchase Order](#)*

*[Logout](#)*

#### **View Current Quantities Remaining**

The Receiving Form can be utilized to view quantities that are remaining to be received on a PO.

- Access the Receiving Form
- Enter the PO number
- View QTY Remaining
- Exit the form without submitting

Quantities will reflect the current QTY Received To Date and QTY Remaining, and will only reflect a recently submitted Receiving Form once it has been verified and entered into Banner by the Receiving Department.

## Procurement Email List

- ✓ Subscribe to the Procurement email list to receive updated purchasing information
  - Send an email to: [mailserv@titan.sfasu.edu](mailto:mailserv@titan.sfasu.edu)
  - In the body of the email type **SUBSCRIBE PURCHASING-L** followed by a space and your email address (ex. SUBSCRIBE PURCHASING-L suzy.smith@sfasu.edu)
  - Delete all other text
  - Change the formatting to Plain Text
  - The subject line should be left blank

## Contact Information

- ✓ Contact Procurement with any questions or if you need further assistance
  - 936-468-2206
  - [purchase@sfasu.edu](mailto:purchase@sfasu.edu)
  - 2124 Wilson Dr., Purchasing & Inventory Building
- ✓ Visit Procurement & Property Services for additional resources
  - <http://www.sfasu.edu/purchasing/>

## Purchasing Cycle

