

Receiving Guide

This guide will review steps to indicate the goods and services are approved to pay, mark items as returned or closed if they are not expected to be delivered

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Logging In

1. Open your web browser
2. Log into MyIIT Portal and find the link to **Buy It** on the Tools tab

OR

In the address field, type <https://iit.unimarket.com>

3. The Illinois Tech **Buy It** login page will appear.
4. Enter your Illinois Tech username and password and login
5. Your **Buy It** home page will appear.

If you experience any issues logging in, please contact purchasing@iit.edu.

Receiving

The receiving action in **Buy It** acts as the approval for the invoice matching when the invoice is submitted against the purchase order. The receiving action can be done before or after the invoice is submitted (*ideally after the invoice has been submitted so you can review the invoice first*).

Once the products or services have been delivered, you as the buyer or the initiator of the order will be tasked to mark the order as received to acknowledge the receipt on the goods or services. By marking the orders with the receipt status you approve payment of any invoice(s) for that item quantity received.

1. On your user dashboard, you will have a dashboard window with the most recent orders that are still open and not marked as received. You can click on the order in the window to open the view order screen and take action to mark the order as received. The link in the bottom right of the dashboard will show you all open orders.

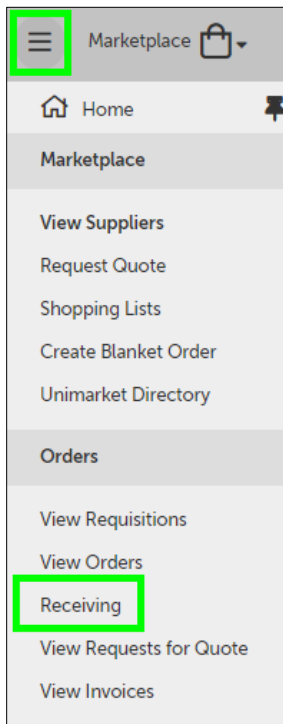
Open Receiving			
Ace Real Time S...	PE500394	9/27/2019 10:26 AM	\$70.00
Warehouse Direc...	PE500387	9/3/2019 2:27 PM	\$55.00
Warehouse Direc...	PE500386	8/23/2019 11:20 AM	\$55.00
Warehouse Direc...	PE500385	8/23/2019 10:32 AM	\$55.00

[View open orders](#)

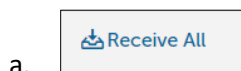
2. Another way to view the orders with items not yet received is to click on the main menu and select Receiving, to be taken to the Receiving page that displays all orders that still need to be marked as received, closed or returned.

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3. Click the Receive All button to receive all of the line items or the Receive button next to each line to mark the individual lines as received.



4. The receiving window will appear differently for the Receive All and line Receive actions.
5. The Receive All action opens the receiving window **with all line items with the ordered or remaining quantity prefilled for all line items on the PO.**

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Receive Order PE100363 ✕

Action * ▾

Receiving Date * ⌚ 3:10 PM ▾

Note

Item	Outstanding	Received Quantity
Original Pads in Cape Town Colors, 11/ 2 x 2, 100- Sheet, 12/ Pack	6	<input type="text" value="6"/>
Small Page Flags in Dispensers, 0.5' x 1.75', Assorted Primary, 35/ Color, 4 Dispensers/ Pack	3	<input type="text" value="3"/>
Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton	1	<input type="text" value="1"/>
Liquid Coffee Creamer, Hazelnut, 0.38 oz Mini Cups, 180/ Carton	4	<input type="text" value="4"/>

6. The Line Item Receiving window will open with only the selected line item information and ordered quantity prefilled for the ordered or remaining quantity.

Receive Item 1 on Order PE100363 ✕

Name Original Pads in Cape Town Colors, 11/ 2 x 2, 100- Sheet, 12/
Pack

Action * ▾

Receiving Date * ⌚ 3:11 PM ▾

Received Quantity *

Note

	Quantity
Ordered	6
Delivered	0
Received	0
Returned	0
Invoiced	0

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7. Select and enter the below information

Receive All Actions

- i. **Receive** - marks the products or services as being received in good standing and approve the matching of any invoice to be paid for those item quantities received
- ii. **Manually Close** - marks items as NOT being received and holds the invoice from being paid. If Manual Close is selected, a note explaining the reason is required and can be visible by the AP department for visibility of why the invoice may be rejected and held.
 1. Reasons for Manually Closing receiving items are for damaged items, returned items or items that were canceled **and are not expected to be received.**
 2. If an item is on backorder and is being shipped in a later delivery, you can choose not to receive the item by entering a 0 quantity in the line item field or mark it as Closed and then Reopen the item when it is physically received.

Line Item Receive Actions – Receive, Manual Close, Return

- iii. **Receive** - marks the products as being received in good standing and approves the matching of any invoice to be paid for those item quantities received
- iv. **Manually Close** - marks items as NOT being received and holds the invoice from being paid. If Manual Close is selected, a note explaining the reason is required and can be visible by the AP department for visibility of why the invoice may be rejected and held.
 1. Reasons for Manually Closing receiving items are for damaged items, returned items or items that were canceled **and are not expected to be received.**
 2. If an item is on backorder and is being shipped in a later delivery, you can choose not to receive the item by entering a 0 quantity in the line item field or mark it as Closed and then Reopen the item when it is physically received.
- v. **Return** - Recording the return allows you to indicate if the item was already received and needs to be returned or if the item was not previously marked as received in the system. You will also be able to select the Return Action from Credit, Replace, or Return Only. We recommend adding in the RMA number into the notes field for tracking and auditing purposes.

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Receiving Date – The receiving date will default to the date and time that the receiving window is opened. You can select a different date in the past to indicate that the goods/services were received or accepted at an earlier date and time.

Note – You can enter a note describing the goods/services when you mark them as received that will be recorded with the order information. If you Manually Close an item, you are required to enter a note.

Undo Receiving

Once an order or line item is marked as received in full, the item and order receiving status will be “Closed” indicating that the total amount ordered has been received. If there is a return or mistake in the initial receipt of the item(s), you are able to Reopen the order or line item receiving and Undo the previous receiving action.

At the top of a Purchase Order, in the Actions menu, you will see the button to  , to reopen the receiving for all line items. At the line level of items, you will also see a “Reopen” button to reopen the line item receiving. If you choose the reopen the receiving, you will be asked to provide a reason that will be recorded for auditing purposes.

3		Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton [...]	1	\$125.61 / Carton	\$125.61	
		 Receiving Closed	1	\$125.61 / Carton	\$125.61	 Reopen
		Account 1-100000-2915-7151-2900- \$62.81 (50.00%) 				 Details
		1-100000-2912-7151-2900- \$62.80 (50.00%) 				

Reopen item 3 on order PE100363 ✕

Name Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton

Description Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton

Note *

Once reopened you can choose to undo the receiving history by clicking the Receiving link in the line item. Once you open the receiving history on the reopened line item you will see the Undo button at the far right of the receiving action line.

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3		Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton L...	1	\$125.61 / Carton	\$125.61	
	<input checked="" type="checkbox"/> Receiving	Closed	1	\$125.61 / Carton	\$125.61	↑ Reopen
	Account	1-100000-2915-7151-2900- \$62.81 (50.00%)				Details
		1-100000-2912-7151-2900- \$62.80 (50.00%)				

User	Action	Created Date	Receiving Date	Number	Delivered	Received	Returned	
Snow Rutkowske	Receive	9/27/2019 3:13 PM	9/27/2019 3:13 PM	766	1	1	0	<input checked="" type="checkbox"/> Undo
Total					1	1	0	

To undo the receiving action for the line item, you will be asked to provide a reason note then click OK.

Undo Receiving ✕

Are you sure you wish to undo this receiving?

Note *

Once the receiving is reopened and undone you will be able to receive the correct amount as needed. You can also view the history of the receiving including the receiving, reopening and undo by clicking the Receiving button on the line item and check the box to Show Hidden Receiving History.

User	Action	Created Date	Receiving Date	Number	Delivered	Received	Returned	
Snow Rutkowske	Reopen	9/27/2019 3:17 PM	9/27/2019 3:17 PM	768				
Note: reason for reopening								
Snow Rutkowske	Auto Close	9/27/2019 3:13 PM	9/27/2019 3:13 PM	767				
Snow Rutkowske	Receive	9/27/2019 3:13 PM	9/27/2019 3:13 PM	766	1	1	0	<input checked="" type="checkbox"/> Undo <input type="checkbox"/> Pricing
Total					1	1	0	
<input checked="" type="checkbox"/> Show Hidden Receiving History								
<input type="button" value="Close"/>								

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Returns

If you have an item that was ordered and needs to be returned, you can record the return in **Buy It** using the Returns features. Recording the return allows you to indicate if the item was already received and needs to be returned or if the item was not previously marked as received in the system. You will also be able to select the Return Action from Credit, Replace, or Return Only. Once you have selected the Return Action, you can select the Return Code which is the high level reason for the return. From Damaged, Defective, Not Required, Order Cancelled, Order Changed, and more. You will also be asked to provide a short reason for the return.

NOTE: RA (Return Authorization) Forms for individual suppliers will still be handled directly with the supplier. The Return function in the system is for documentation only.

2	\$19.32 / Each	\$38.64	
2	\$19.32 / Each	\$38.64	Receive Details

Receive Item 3 on Order PE100363 ×

Name Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton

Action * Return

Receiving Date * 9/27/2019 🕒 3:19 PM ▼

Return Type *
 I am returning previously received items ?
 I am returning items just delivered ?

Return Quantity * 1

Return Action * Replace x ▼

Return Code * Damaged x ▼

Note RMA# 84354

	Qty.
Ordered	1
Delivered	1
Received	1
Returned	0
Invoiced	0

OK
Cancel

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Viewing Receiving History

In the Receiving screen you can filter and search for past order that have been received, closed or are still pending receiving. The default search will show all pending/open requisitions. To find a past receiving records use the Supplier search field to search by individual suppliers, the date range to narrow the results, State to view all orders, Manually Closed, Open or Received orders.

The screenshot displays the 'Receiving' interface. At the top, there are search filters: 'Order Number', 'Supplier', 'Period' (set to 'Last 90 Days'), and 'Organization Unit'. A 'Buyer' field is also present. A dropdown menu is open, showing options: 'All', 'Manually Closed', 'Open' (which is highlighted), and 'Received'. Below the filters, a table shows a list of orders. The visible row includes 'olutions LLC', '9/27/2019 10:26 AM', and 'Open'. A 'Receive All' button is located at the bottom right of the table.

To look at the receiving history for a certain order, search and find the order then click on the order number to see the View Order page. The receiving history for each line is visible behind the Receiving link under each line. The Receiving History window will display the user that performed the receiving actions, as well as the date and time that the action was taken.

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3		Self- Stick Easel Pads, 25 x 30, White, 30 Sheets, 6/ Carton (...)	1	\$125.61 / Carton	\$125.61	
		Receiving Closed	1	\$125.61 / Carton	\$125.61	Reopen
		Account 1-100000-2915-7151-2900- \$62.81 (50.00%) Details				
		1-100000-2912-7151-2900- \$62.80 (50.00%) Details				

Receiving History for Item 3 - Self- Stick Easel Pads, 25 x 30, White, 30 Shee...								Close
User	Action	Created Date	Receiving Date	Number	Delivered	Received	Returned	
Snow Rutkowske	Auto Close	9/27/2019 3:28 PM	9/27/2019 3:28 PM	771				Reopen
Snow Rutkowske	Receive	9/27/2019 3:28 PM	9/27/2019 3:28 PM	770	1	1	0	Pricing
Snow Rutkowske	Return	9/27/2019 3:28 PM	9/27/2019 3:27 PM	769	0	-1	1	Pricing
Return Action: Replace , Return Code: Damaged								
Note: RMA# 8454								
Snow Rutkowske	Receive	9/27/2019 3:13 PM	9/27/2019 3:13 PM	766	1	1	0	Pricing
Total					2	1	1	
<input type="checkbox"/> Show Hidden Receiving History								
Close								