

RECEIVING

Purchase Orders

The Receiving Process

Physically receiving items ordered	Receiving Items <u>in Business Plus</u> :	
<p>Someone has to see and check the items sent by vendor. If items go to the warehouse, Receiving staff will “see/check” items in certain circumstances as explained below.</p>	<p>If the purchase order is a Blanket Purchase order, then no one enters items as being received in Business Plus.</p> <p>PO Type: <input type="text" value="B"/></p>	<p>If the purchase order is a Standard Purchase order, then whoever is the receiver at delivery location will have to enter items as being received in Business Plus</p> <p>PO Type: <input type="text" value="P"/></p>

Line Item Descriptions

Please remember “description” serves 2 purposes:

1. Communicate to the vendor what you want to order
2. Communicate to the receiver what you ordered
 - a. Many times users will use an item number to communicate to the vendor what is being ordered, but when the item arrives without a packing slip or with a packing slip containing partial information, it is impossible to match up the item received with what was ordered by looking at the receiving checklist.
 - b. Also communicate pertinent details to the receiver such as size, color, etc.

Delivery Addresses

If items are being sent to the warehouse, leave the default address in Ship tab on the purchase order as shown:

Vendor Remit **Ship** Bill

WHSE Addr: L1

ALIEF ISD WAREHOUSE
12101 7TH STREET

HOUSTON TX 77072

If items are sent elsewhere by the vendor, be sure to change the address in Ship tab on the purchase order (and ensure you’ve made arrangements for inside delivery if necessary).

Examples

Vendor Remit **Ship** Bill

777 Addr: L1

MAINTENANCE WAREHOUSE
12135 HIGH STAR

HOUSTON TX 77072

Vendor Remit **Ship** Bill

711 Addr: L1

M.I.S./DATA PROCESSING AISD
12135 1/2 HIGH STAR

HOUSTON TX 77072

Attached Lists

Some blanket orders must have attached lists.

- Typically, purchase orders for sets should be a blanket purchase order.
- Purchase orders for a “see list” should be a blanket purchase order.

What Items Should Go Directly To Campuses

Please see Purchasing guidelines for a complete list. If in doubt, please call.

Examples of items that should go directly to campuses are:

- Subscriptions
- Furniture
- Anything with glass (trophy case, aquarium, etc.)
- Smart boards
- Hazardous materials
- Live/dead animals for science
- Stringed instruments
- Anything over 50 lbs.

The Receiving Checklist / Packing Slip

If the purchase order is a **Blanket** Purchase order and it is delivered to the warehouse, receiving staff at the warehouse will print a checklist and send it to location where the person receiving the items should check items against packing slip, sign, date and send (packing slip) to Accounting dept.

If the purchase order is a **Standard** Purchase order, then whoever is the receiver at delivery location will have to check items and enter items as being received in Business Plus.

If the **Standard** Purchase order arrives at warehouse first, warehouse will print a checklist, check items if P. O. total is => \$500. and enter items as being received in Business Plus.

The Under \$500.00 Rule

Applies to a **Standard** Purchase order that first arrives at the warehouse – basically:

- Contents are verified by packing slip **only** (if a packing slip is available) and received in BusinessPlus
 - Packages are not necessarily opened at warehouse
 - Contents are not necessarily checked
 - If there is no packing slip, contents may be checked as best as possible and entered into BusinessPlus as received

10 Days to Report Discrepancies

Communicate P. O. vendor discrepancies to the district expeditor by email or phone call, at least.

Who To Contact With Problems

Email or Call Receiving Supervisor x3310

- To see if a P. O. has arrived
- To inquire about a discrepancy between what is written in the checklist and what was sent, if the P. O. arrived at the warehouse first.
- If there is damage to a P. O. that arrived at the warehouse first.

Email or Call District Expeditor x5490

- If P. O. has not arrived and should have already
- To report a vendor discrepancy
- If there is damage to a P. O. that did not arrive at the warehouse first.
- Problems with a vendor

FOB Terms

Freight Charges and F.O.B. Terms

It is Alief ISD policy to have all items shipped to us with all shipping charges paid by the vendor. Please be sure to verify this when dealing with vendors and include this on your purchase order. If shipping charges are not included in the price of the item, then the shipping charges should be added as a separate line item on the purchase order.

Should a vendor discuss F.O.B. terms, please see below and note that the only option that should be accepted is option number 5. We do not want to be responsible for filing freight claims, as these claims can be very time consuming to resolve.

FREIGHT TERMS

F.O.B.

(Free On Board)

1. F.O.B. origin, freight collect Buyer Pays Freight charges Buyer Bears Freight charges Buyer Owns Freight in transit Buyer Files claims - if any	4. F.O.B. destination, freight collect Buyer Pays Freight charges Buyer Bears Freight charges Seller Owns Freight in transit Seller Files claims - if any
2. F.O.B. origin, freight prepaid Seller Pays Freight charges Seller Bears Freight charges Buyer Owns Freight in transit Buyer Files claims - if any	5. F.O.B. destination, freight prepaid Seller Pays Freight charges Seller Bears Freight charges Seller Owns Freight in transit Seller Files claims - if any
3. F.O.B. destination, freight prepaid and billed Seller Pays Freight charges Buyer Bears Freight charges Seller Owns Freight in transit Seller Files claims - if any	

***Receiving staff does not print purchase orders.
Only certain information displays on receiving checklists.
Notes in purchase orders do not display on receiving checklists.***

Q & As