Receiving Transaction Summary: Viewing Summary Information

- This document gives you a brief introduction to the information that you can find on the Receiving Transactions Summary windows. The summary windows addressed are:
  - **Receipt Headers**: displays the shipping details for the queried receipt.
  - **Receipt Transaction:** displays the details about the goods or services received.

- From the Navigator window, select the **Receiving Transactions Summary** function.
  - This opens the **Find Receiving Transactions** window.

REMINDER: If you've been working in AIS, the "Org" may have previously been selected. If this is your initial logon, you may be prompted to select an "Org", in which to work, prior to selecting the above function.

- Use the Find Receiving Transactions window to enter search criteria and execute a search for the needed Purchase Order. (You learned how to use the Find Receiving Transactions window in Learning Cycle 1of this Module.)
  - Remember, the most common search method is to use the Purchase Order Number.
  - Accept **Header** as the default in the Results region.
  - Click **Find** to execute the search.

Receipt Headers Summary

- The **Receipt Headers Summary** window opens to display the shipping details for the receipt.
  - In the default view of this window, you will see the receipt number, date the receipt was created, the name of the supplier, and other shipment information.
  - Use the scroll bar to view all of the fields available.
  - Use the **Folder** menu functions to view even more fields available from this window.
    - Menu Path: Select **Folder** > **Show Field**.
    - The **Show Field** list displays the additional fields of information available for review. To add them to the window, simply select the field and click **OK**.

Receipt Transaction Summary

- To view the **Receipt Transaction Summary** window, click the **Transactions** button at the bottom of the Receipt Headers Summary window.

- The Receipt Transaction Summary window displays the details about the goods or services received.

- For each shipment on the PO, you will see the receiving **Transaction Types**.
  - The number of Transaction Types for each shipment will vary depending on the **Receipt Routing**, and whether there have been any corrections on the receipts.
  - For **Direct Delivery** routing - there will be a minimum of two Transactions Types - **Receive** and **Deliver**.

- In addition to the Transaction Types, the Amount received, Date of receipt, Item # (if applicable) and Destination are available in the default view of the window.

- The bottom portion of the window, displays specific information related to the Purchase Order.

- Use the scroll bar to view additional fields on the default window.

- Not seeing the information that you want???
  - Scroll back to the beginning of the window and look at the fields available using the Folder function.
    - Select **Folder** menu **> Show Field** to view the list.
    - The Show Field list has an additional 36 fields available.
  - **Remember** - whenever you are on a window that uses the Folder functions... there may be additional information that you can see using this function.

- Use the **Close Form** icon on the Toolbar to close all the open windows and return to the Navigator.