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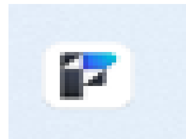
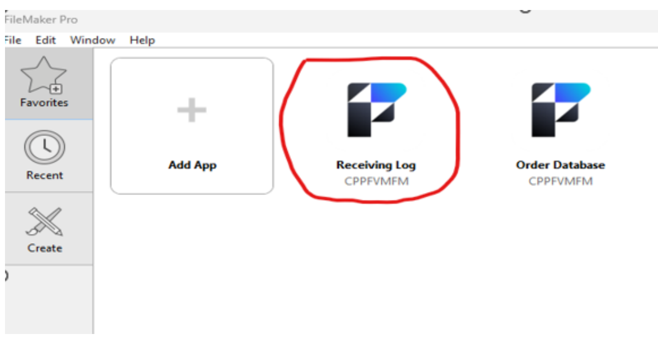
Receiving Process

Checking In Boxes

Step 1: Open FileMaker Pro → Should look like this: 

Step 2: Click Receiving Log; Why we click receiving log is because this is the system the "back," or "warehouse," uses to receiving boxes, as well as do consolidations when working closely with merchandising, but we will get to that later.

(Within FileMaker there should be two options followed as said as in the picture)



Step 3: Enter in account name/password and log into FileMaker Pro

If you somehow forget your password or login, please contact your employer IF in the cause you wrote it down remember that Win Prism and FileMaker should have TWO different users.

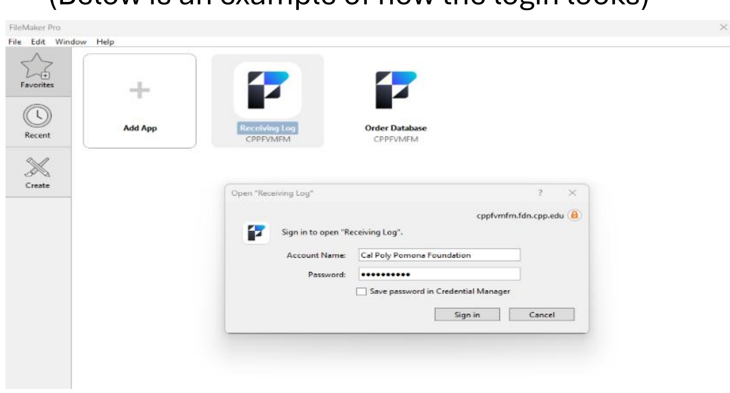
For Example: Your FileMaker "Account Name" or Username should look something like this

- "Billy B" or "Chris P"

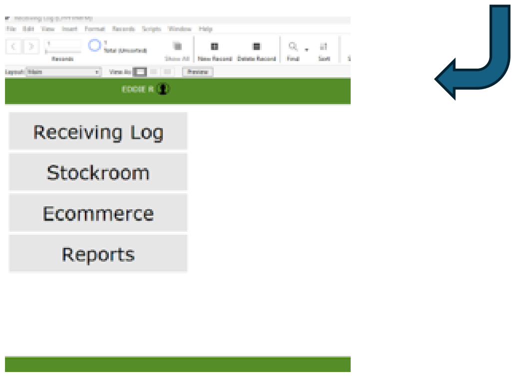
WHILE Win Prism "Username" should look something like this

- "BillyB" or "ChrisP"

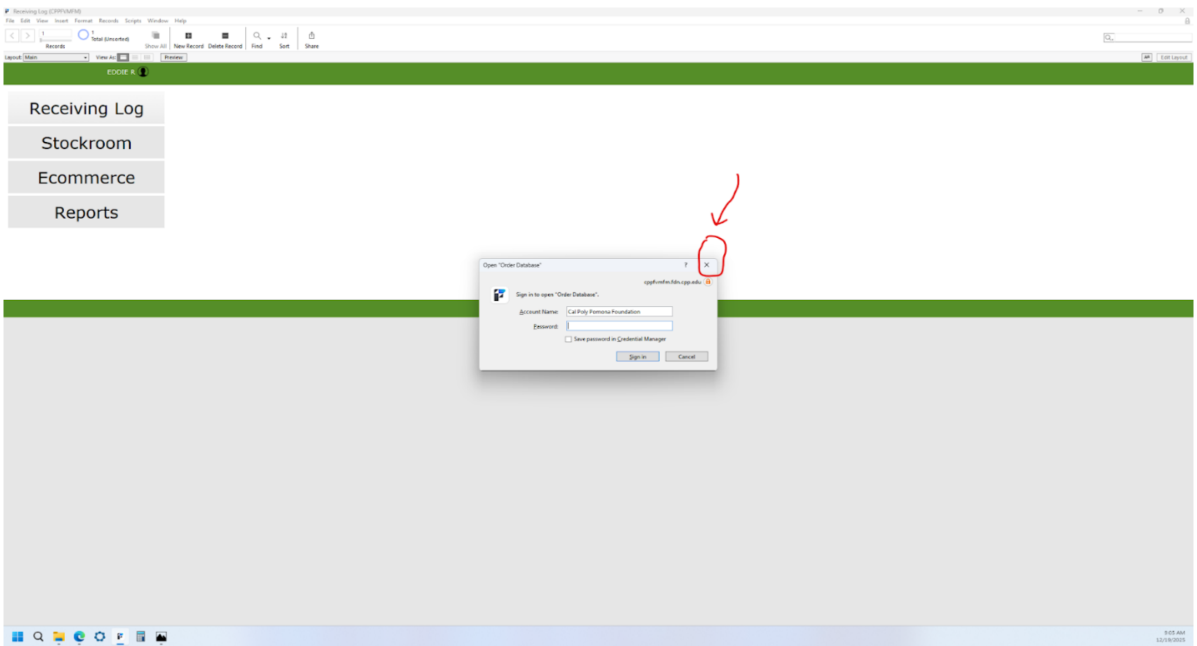
(Below is an example of how the login looks)



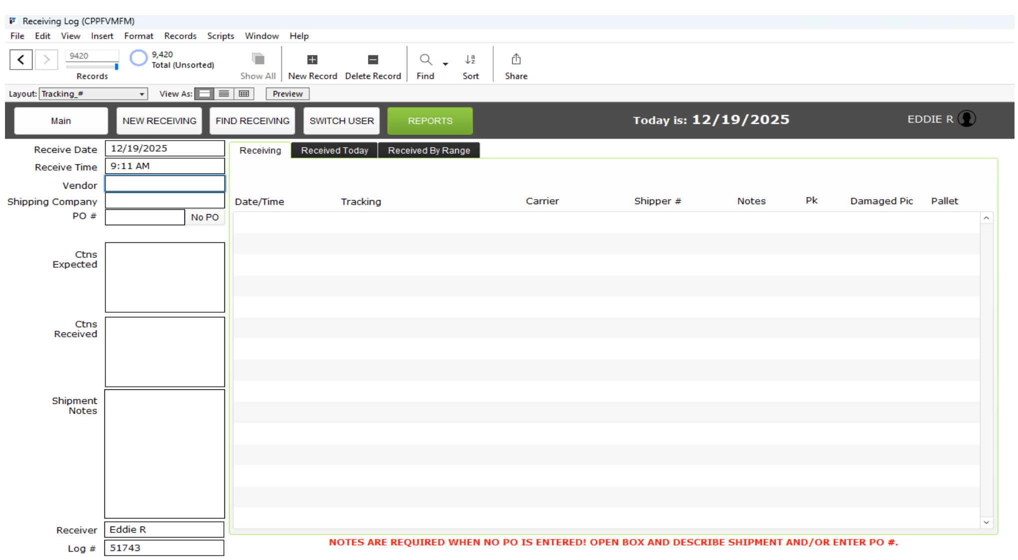
(How it looks once you are logged into FileMaker Pro)



Step 4: Once logged in, click on the Receiving Log tab, occasionally, the system may ask you to log in again, ignore this prompt and just close it out to enter the receiving log.



NICE! Now you are logged in and ready to start checking in some boxes below is how the "Receiving Log" tab looks like



Step 5: Now box check in can start

Begin by saying “Hello” to our delivery people AND check if the boxes we get on the dock say: “Bronco Bookstore” “Bldg. 66” “Lori Clark” “Keith Grissom” or “Clint Aase” These are just examples of what you would expect but I would like to assume you’ve gotten mail before so we obviously don’t want some else’s mail. IN THE CASE we do get someone else’s mail. ITS OKAY just let a manager know or type in the team’s chat and we can work it out.

We categorize boxes based off several factors such as,

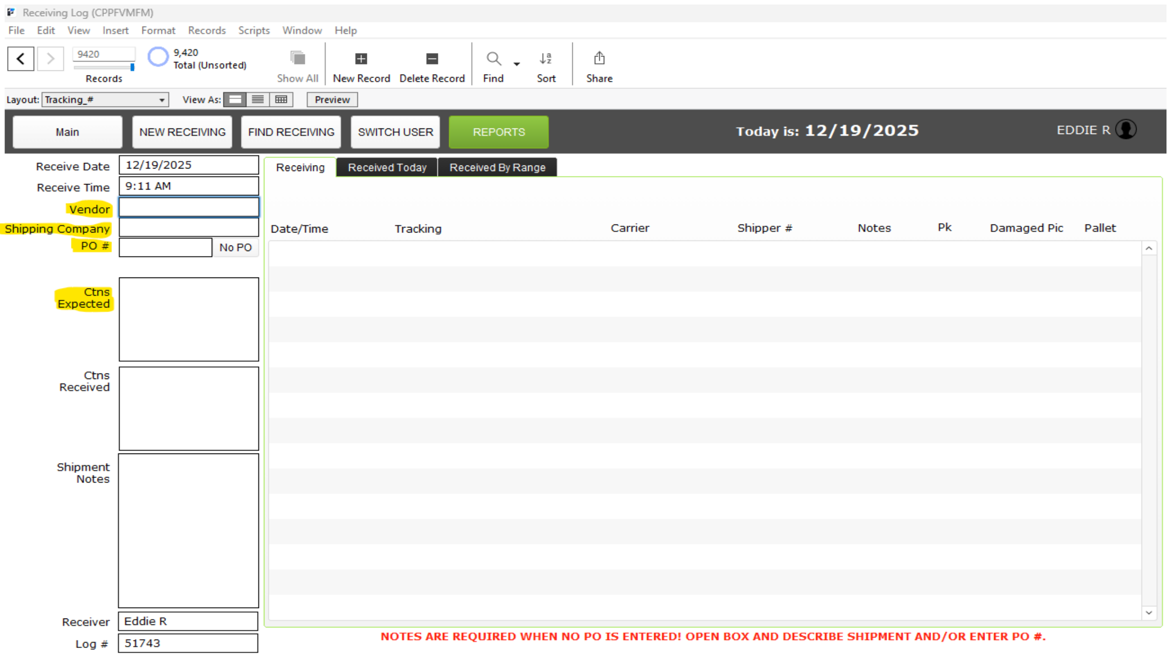
- GM or PO numbers (Example: GM033467, PO-033420TX-1)
- Number of boxes for any specific order (Example: Box 1 of 3)
- Vendor (Example: Wide world, Champion, D&H)

Some PO or GM numbers may or may not be visible on the boxes themselves, **if that's** the case then you need to look for any kind of invoice attached (Or refer Option B) to one of the boxes of a specific order, these can be found on the sides of boxes or may be inside a box (If inside a box, usually there will be a label stating such). Occasionally however, there will be no invoice at all nor will the PO or GM numbers be visible, in the event of that occurring ask Keith or another manager in store or on teams as someone will be able to assist you or refer to How to find Orders. *While you are organizing the boxes also keep in mind for any obviously damages to any boxes that includes: wet spots, open boxes, anything that you might think “Oh that’s weird” let a team lead know and if anything, take a pic and hold on it till you show a team lead.*

Step 6: Once boxes have been organized, bring them inside from the loading dock to “check in” **DURING THIS PROCESS BEGIN BY MARKING THE DATE ON THE BOXES; FOR EXAMPLE, IF ITS 01/12 AND YOU ARE CHECKING THE BOXES THAT DAY SIMPLY GRAB A MARKER AND JUST WRITE 01/12, NOT YEAR IS NEEDED.** The reason we do this is so we know what day a certain box came, and it can hold us accountable how fast/slow are verifying/ receiving process is.

PLEASE GO SLOW IF THIS IS YOUR FIRST TIME. *We do not expect you to know everything and anything on your first day. PLEASE ASK QUESTIONS, no question is wrong, we would much have you ask 10000 questions then mess something up trying to figure it out.*

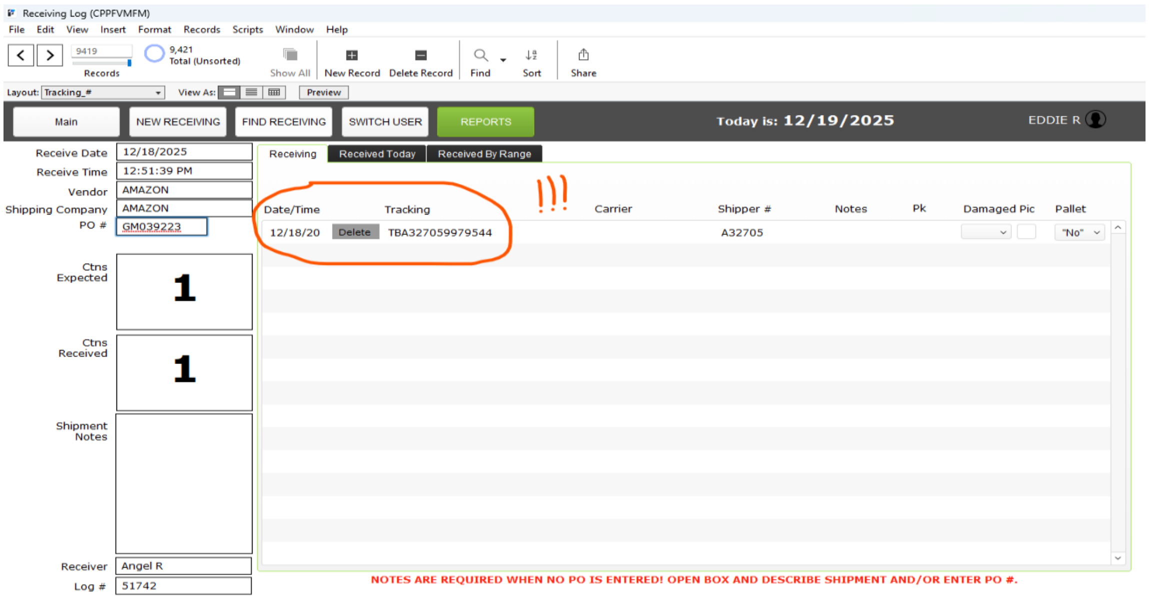
Necessary information will need to be inputted into the Receiving Log first before scanning (Vendor, Shipping Company, PO or GM numbers and Ctns Expected).



(This is what you will need to put in, most of this can be found on the shipping label for any box of a specific order, if there is a previous receiving order still cataloged, simply click on new receiving to begin a new receiving check in)

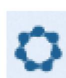
Step 7: Once necessary information is entered, begin scanning boxes via tracking number, scanning all boxes of a specific order before moving on. Please note that not all tracking numbers will appear the same depending on the specific shipping company that is delivering them. Most of the time however, the tracking number will always be the bottom barcode on the shipping label. In special cases, the tracking number may be damaged, in this event you may need to manually input each tracking number.

This is an example of what a shipping label looks like while working @ the bookstore.



(If neither barcode nor tracking numbers are visible, reach out to a shift lead or any supervisor for assistance)

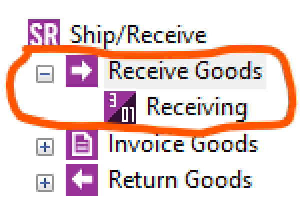
Step 8: Once all tracking numbers are scanned in for a specific order, SAVE the GM or PO numbers and open Win PRISM to continue. Once opened, simply log in with your credentials and you can begin the final process for checking in/receiving.

(This Icon Here) 

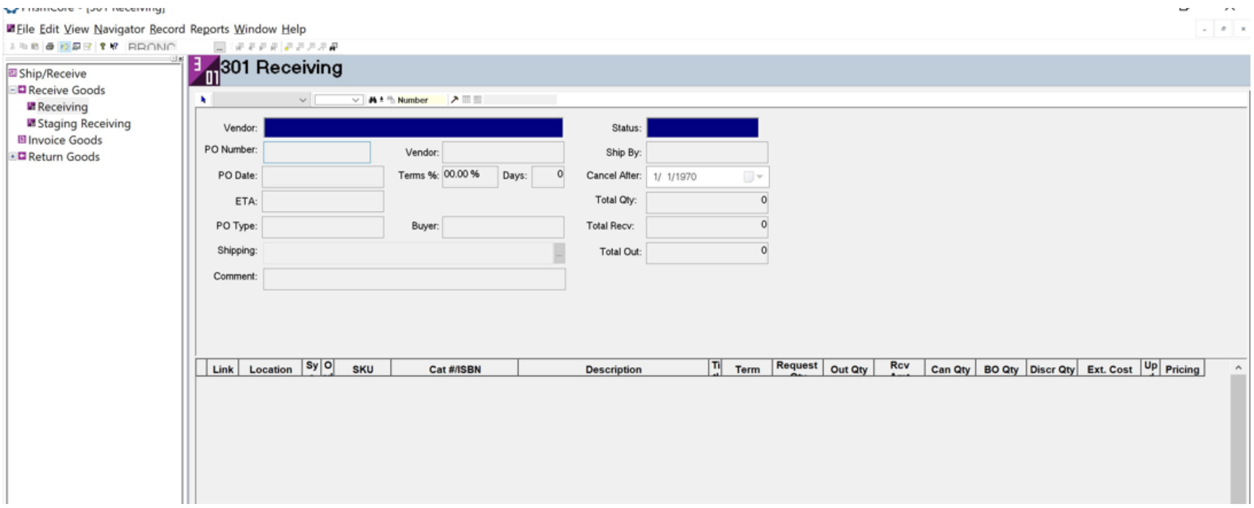
Step 9: Upon opening prism, click on the purple Ship/Receive tab or tab 3 while working here you'll hear a lot of people saying 201 or 301 purple tab is considered 3.

(This Icon Here)

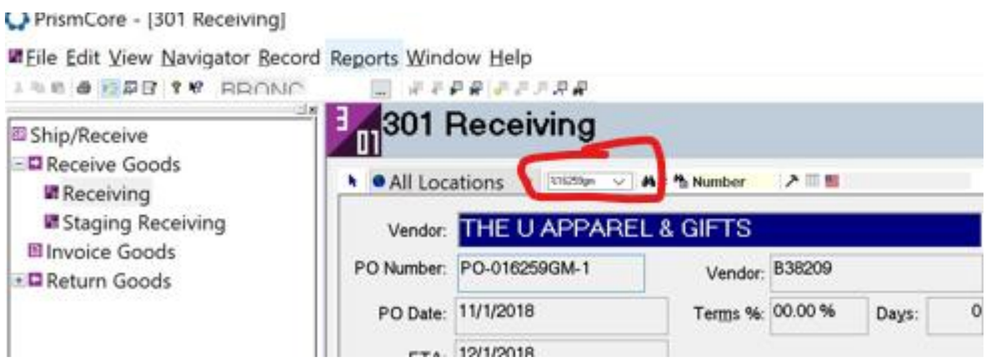
Then Click on the Receive Goods tab and select the 301 options (Hint: Will be the only available option to select)

(This Icon Here) 

Step 10: Once clicked on 301 or "Receiving" your screen should look like this



Step 11: While checking in the boxes you SHOULD'VE found the GM or PO if you did. Within the same tab you already in there's a "Search Bar" next to "All Locations" to the right below is an example

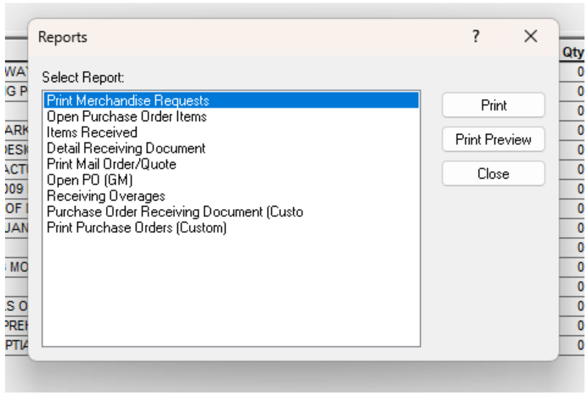


Step 12: Enter the PO you got from checking in the boxes and NOW we are going to print the Receiving Doc to then tape or assign you can say to the specific boxes that have that PO/GM. There are TWO ways to print the Receiving document

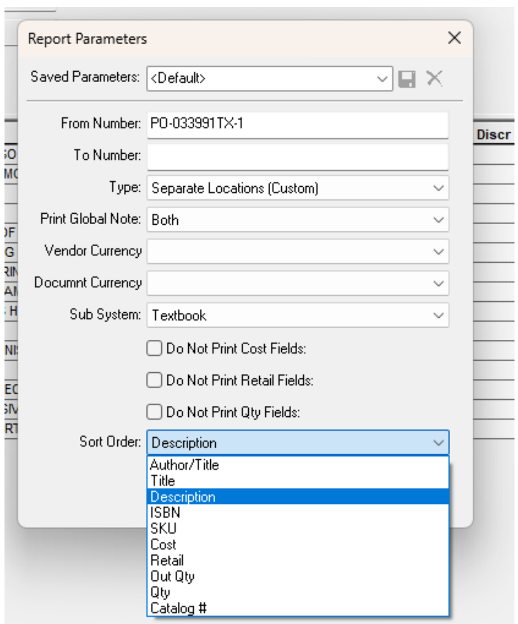
Option 1: You can simply click the print icon near the top left corner

Here is an example:

Once you click on this there should this prompt:

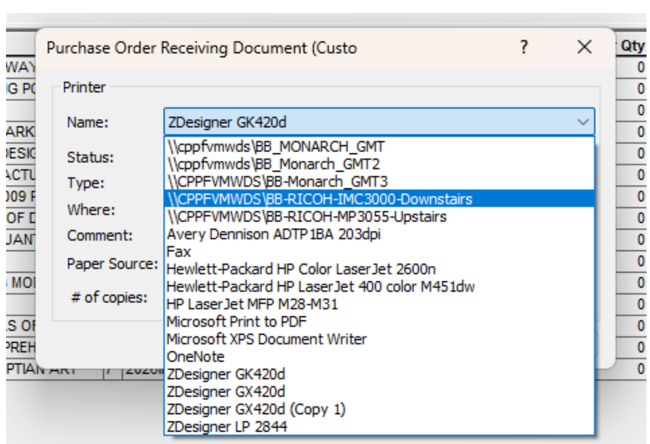


Then you will be given this prompt:



Please change the "Sort Order" area to Description. This is an important step because then when you print out the Receiving Doc it will be in alphabetical order.

Depending on your location of where the computer you are using is located you will then be given the prompt to print like so:



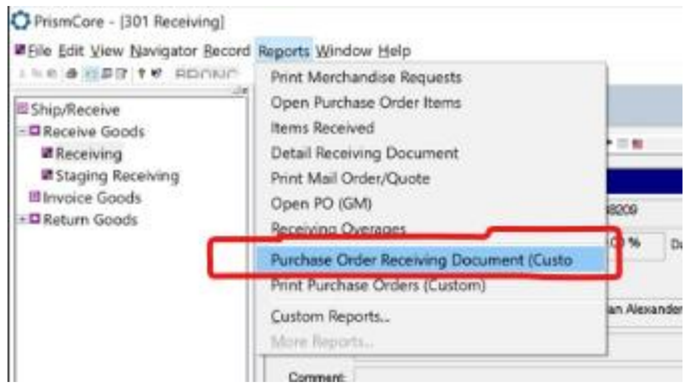
For Reference, BB-RICOH Downstairs is in the main room where you will clock in and out

Option 2: You can click on Report also near the top left corner

Here is an example: 

Once clicked on there should be a prompt as well that looks like this:

To then print the "Receiving Doc," click the 2nd to last option or "Purchase Order Receiving Document (Custom)



Step 13: Once you did print out the doc, it should look like the example below; Please ignore the info in the example but RECOGNIZE and ACKNOWLEDGE how the doc would look like:

Receiving Document - Separate Locations
Location: BRONCO BOOKSTORE

PO Number: PO-016259GM-1

Received	Who	Invoice Enclosed	Bill of Lading

PO Date: 11/01/2018
Date Printed: 12/21/18 11:30 am
Vendor: THE U APPAREL & GIFTS(B38209)
Comment:

General Merchandise

Out Qty	Qty	Catalog Number / Pkg Typ	Unt	Type / Description	SKU / Term	Size / Color	Cost	Retail
____ 144	1	75200 EA	14	MUG CERAMIC BARISTI HORSE MARK OVR CPP SCRIPT EST 1938 CREAM W/GREEN ACCENT	12354191 Non-Term	14 OZ CREAM	$3.68 ____	$7.99 ____
TOP RIGHT OF ART PAGE								1235 4191
____ 144	1	3310 EA	14	MUG CERAMIC BARISTI HORSE MARK OVR CPP SCRIPT EST 1938 GREEN	12354184 Non-Term	14 OZ GREEN	$3.76 ____	$7.99 ____
TOP LEFT OF ART PAGE								1235 4184
____ 144	1	1559 EA	14	MUG CERAMIC BISTRO HORSE MARK OVR CPP SCRIPT EST 1938 DARK GREEN	12354177 Non-Term	15 OZ DK GREEN	$4.59 ____	$8.99 ____
CENTER LEFT OF ART PAGE								

You now are done we the processes of "Check in Boxes"

Next steps after checking in

Order of Importance

Order of Importance refers to which boxes should be worked on **first** after check-in. When you receive multiple boxes (for example, 20–30 boxes mixed between POs and GMs), this order helps you decide where to start to keep operations running smoothly.

Follow this order unless instructed otherwise:

1. Food

If **any food items** are present, start with those **first**.
Food is time-sensitive and can expire or spoil, which is why it always takes top priority.

2. Special Orders

If there is **no food**, next check for **Special Orders**.

Special Orders are typically customer-specific and often time-sensitive.
Refer to the **Special Orders Receiving** guide for the full process.

3. Clothing / Apparel

Once food and Special Orders are complete (or if none are present), move on to **clothing**.

a. Teams Notification (Required)

Before processing clothing, **notify the team via Microsoft Teams**.

Send a simple message such as:

"GM39473 from Champion has arrived."

- If there are **multiple clothing orders**, list each GM/PO.
- Even if **all 10 boxes are clothing**, this message must still be sent.

Pattelynn (Apparel Manager) will respond with instructions on which GM/PO should be prioritized.

b. Why This Matters

This step helps create a smoother workflow across the bookstore.
For example, if Pattelynn needs a specific GM/PO counted and placed on the floor urgently, your Teams message gives her an early heads-up and prevents delays.

4. Textbooks

Once all steps above are complete, proceed with **Textbooks**.
Refer to the **Textbooks Receiving** guide to follow the correct process.

Important Reminder

This **Order of Importance is not fixed** and may change depending on what is received or based on management direction.

This outline exists to guide you in situations where:

- Multiple shipments arrive at once
- Priority is unclear
- No manager is immediately available

When in doubt, **ask a lead or manager** before proceeding.

Receiving: Opening & Closing Responsibilities

"Opening" Receiving

"Opening" Receiving refers to the tasks that must be completed at the **start of your shift** to ensure the dock and receiving area are ready for the day.

Opening responsibilities include:

1. **Open the dock gate**
2. **Check Microsoft Teams** for any tasks or notes left by the closing shift that were not completed
3. **Clean and organize workstations**

4. **Notify the GM Manager, Receiving Manager or Shift Lead** of any outstanding issues or tasks that need attention

Delivery Timing Expectations

- Most package deliveries occur between **10:00 AM and 2:00 PM**
- **Food deliveries (Core-Mark or similar vendors)** typically arrive between **8:00 AM and 9:00 AM**

If food is received, refer to the **Food Receiving** guide to understand the proper check-in process and next steps.

"Closing" Receiving

"Closing" Receiving refers to the tasks that must be completed **before the end of your shift** to prepare the dock and receiving area for the next day.

- The dock is officially **closed at 3:30 PM**, Monday through Friday
- You may still be scheduled until **4:00 PM or 5:00 PM**, depending on coverage and workload

If there are **no boxes left to receive or verify**, use the remaining time to:

- Clean the receiving area
- Complete **consolidations**
- Assist with other tasks as directed by management

End-of-Shift Communications

Before leaving your shift, you are **required** to send a message in the Microsoft Teams chat (or leave a clear handoff note) that summarizes:

- What you worked on
- What still needs to be completed

Example:

"Verifying the count on GM39473 — not completed."

This step is extremely important. While written notes can be helpful, they may be missed or misunderstood. Microsoft Teams communication is required to ensure a clear and accurate handoff between shifts.

In addition, before clocking out, you are expected to **clean your work area**. This includes removing any:

- Drinks
- Food
- Products or loose materials

We understand this may feel repetitive or confusing (for example, wondering why a Teams message is required). The purpose is to be respectful of your coworkers and to support the next shift. Leaving clear communication and a clean workspace ensures the next team can start their work smoothly just as the previous shift did for you.

Closing Checklist Examples

Below are examples of appropriate closing tasks:

1. Ensure all **workstations are clean and organized**
2. Take out **trash and recycling**
3. Ask a **manager** if help is needed on the sales floor
4. Complete **cashier training** with Chris or Keith (if assigned)

These are examples of actual tasks that may vary based on the day's needs.

Workspace Etiquette & Shift Communication

Maintaining a clean, organized workspace and clear communication is a shared responsibility during both **"Opening" Receiving** and **"Closing" Receiving**. The condition of your work area and the information you leave behind directly affect the efficiency of the next shift.

Relation to Opening & Closing Receiving

- During **"Opening" Receiving**, workstations should be cleaned and organized to prepare the dock and receiving area for incoming deliveries.

- During **“Closing” Receiving**, work areas must be cleaned and reset to ensure the next shift knows what to expect and can begin work immediately.

In both cases, the goal is to leave the receiving area in a ready, organized, and clearly communicated state.

Workspace Expectations

- Do not leave your section or workstation messy or disorganized.
- Tags, loose product, packaging, or random items should not be left behind.
- If something can be cleaned or put away in **under 5 minutes**, it should be completed before transitioning to another task or ending your shift.
- Always leave your area in a condition you would expect when starting your own shift.

Tools & Equipment

All tools used during Opening or Closing Receiving must be returned to their designated locations before the end of your shift.

- **Box Cutter Knives**
    - **Box cutter knives must be returned to the box cutter storage section after use.**
    - **Do not leave box cutters on workstations, carts, or inside boxes.**
    - ***(Image Placeholder – Box Cutter Storage Area)***
- **Pencils and Markers**
    - Pencils and markers must be returned to their designated area at the end of your shift.
    - ***(Image Placeholder – Pencils/Markers Storage Area)***
- **Tape Dispensers**
    - Tape dispensers must be returned to their designated area after use.

  - If an entire roll of tape is used, it must be replaced before the end of your shift, so it is ready for the next person.

Replacement tape rolls are in the upstairs warehouse:

  - Take the elevator to 2R
  - When the doors open, the store use supplies are located immediately to the right on a wall of shelving

If tape supplies are not available, contact a store lead or manager for assistance.

Shift Communication (Required)

Referring to **End-of-Shift Communications** clear communication is a required part of workspace etiquette.

- **Microsoft Teams is the required method** for end-of-shift and shift-to-shift communication.
- Written notes may be used as a temporary reference but **should not replace Teams messages**.

Written notes can and will be missed, misplaced, or misunderstood. Because of this, all important information must be communicated through Teams, including:

- **What was worked on**
- **What still needs to be completed**
- **Any workspace or receiving-related issues**

Why Microsoft Teams Is Used

Microsoft Teams is used because it is the most reliable and accessible option:

- Everyone has access to Teams on their phone or workstation
- Messages are time-stamped and visible to the entire team
- Information is not lost during cleanup or shift changes
- Updates can be reviewed at any time by Opening, mid, or Closing shifts

Using Teams helps prevent confusion, reduces duplicate work, and ensures smooth transitions between shifts.

Before completing your shift, take a moment to:

- Check your workspace
- Return tools to their proper locations
- Send a clear Teams message if any work is incomplete

Conclusion

The main goal of both opening and closing shifts is to ensure that:

- The next shift knows exactly what to expect
- No tasks are left unclear or undocumented

Remember:

- This is a professional work environment
- Do not spend time on your phone while on shift
- If you finish your assigned tasks, **find something productive to do**
    - Learn a new section of the bookstore
    - Ask for additional work
    - Assist another department if approved

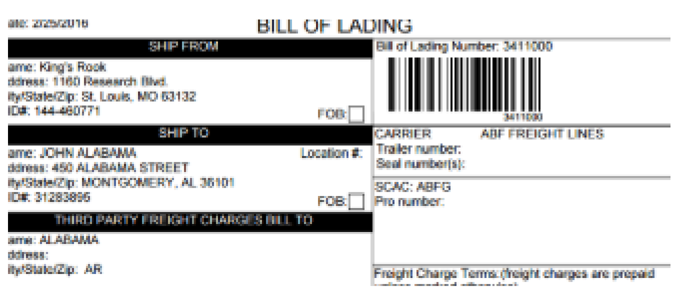
Being proactive, communicative, and engaged helps the entire team succeed.

Pallet Receiving

Pallet Receiving follows the same steps as the "Checking in Boxes" process, with one important difference specific to pallets.

Instead of scanning individual box tracking numbers, you will scan the barcode on the invoice provided by the delivery driver. This invoice barcode functions as the tracking reference for the entire pallet.

(Below is an example of what a pallet invoice may look like.)


ate: 2/25/2016

BILL OF LADING

SHIP FROM

ame: King's Rook
ddress: 1160 Research Blvd.
ity/State/Zip: St. Louis, MO 63132
ID#: 144-460771
FOB:

Bill of Lading Number: 3411000
3411000

SHIP TO

ame: JOHN ALABAMA
Location #:
ddress: 450 ALABAMA STREET
ity/State/Zip: MONTGOMERY, AL 36101
ID#: 31283895
FOB:

CARRIER ABF FREIGHT LINES
Trailer number:
Seal number(s):

SCAC: ABFG
Pro number:

THIRD PARTY FREIGHT CHARGES BILL TO

ame: ALABAMA
ddress:
ity/State/Zip: AR

Freight Charge Terms:(freight charges are prepaid

Invoice Information

The invoice given by the driver should include all necessary information to complete pallet receiving in FileMaker. This information is the same as what you would enter when checking in boxes and should include:

1. Vendor
2. Shipping company
3. PO or GM number
4. Number of pallets received

If any of this information is missing, stop and contact a manager or shift lead before proceeding.

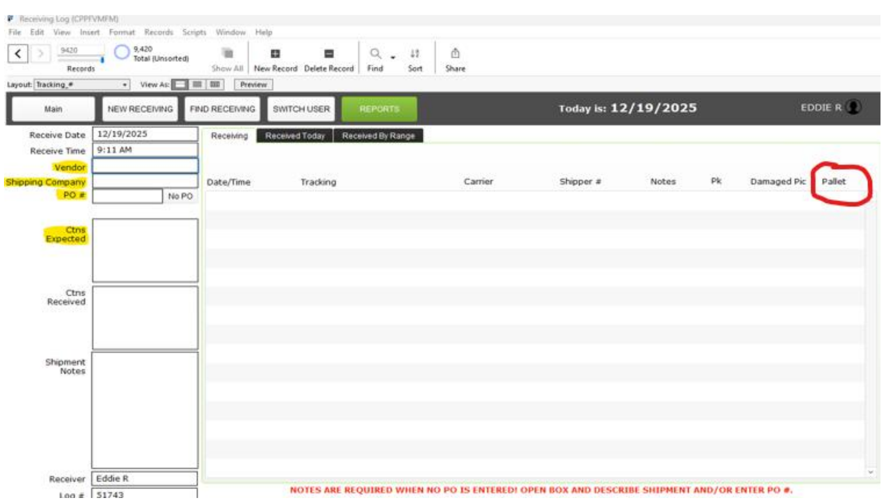
Entering Pallet Information in FileMaker

Once you have the invoice:

1. Log in to FileMaker Pro
2. Click on the Receiving Log tab
3. Enter the information from the invoice into the Receiving Log

When entering pallet deliveries, you will see a Pallet field in FileMaker:

(Below is an example; the Pallet field is circled in red.)



- Select Yes or No in the Pallet field
- **This step is required for pallet deliveries**

- **You do not need to complete this field for regular box deliveries**

Reminder

Aside from scanning the invoice barcode and marking the pallet field, all other steps follow the standard “Checking in Boxes” process.

If you are unsure at any point, ask a manager or supervisor before continuing

Store Use Receiving

Store Use Receiving refers to products that are checked in for internal store use rather than for sale. These items may not have a GM attached, which is expected for store use.

How to Receive Store Use Items

1. When receiving store use items:
2. Check in the product as usual
3. Record the **shipping company**
4. Record the **vendor**
5. In the **PO/GM Attached** field within the **Receiving Log** in FileMaker, enter **“STORE USE”**

This ensures the item is properly documented even without an associated GM.

Reminders

- Not all store use items will have a GM attached, this is normal.
- Always enter **“STORE USE”** in the **PO/GM Attached** field to prevent tracking issues.
- The **vendor and shipping company must still be recorded**, even if the item is not for sale, this is used to verify that we received the product\

Common Mistakes

- Leaving the **PO/GM Attached** field blank
- Trying to search for or create a GM for store use items
- Forgetting to enter the **vendor or shipping company**
- Assuming store use items do not need to be logged

What To Do If You’re Unsure

If you are unsure whether an item is **Store Use** or how it should be received:

1. Pause the check-in process = **do not** guess.
2. **Check the paperwork or box label** for any store use indicators.
3. **Ask the Lead, Receiving Manager, or GM Manager** for clarification.
4. If confirmed as store use, complete the check-in and enter **"STORE USE"** in the **PO/GM Attached** field.
5. If still unclear, **set the item aside** and notify the team via chat for follow-up.

Finding POs/GMs in 201

As discussed briefly in the **Receiving Process (Step 9)**, most POs/GMs that are ready to be received and do not require modification will already appear in the **301 tab** (also known as the purple tab) in Win PRISM.

However, there will be situations where a PO/GM **does not appear in 301**. When this happens, the **201 tab** (also known as the blue tab) is used to locate or create the PO/GM so receiving can continue.

This section explains how to properly find POs/GMs using the 201 tab when they are not available in 301.

What is the 201 Tab?

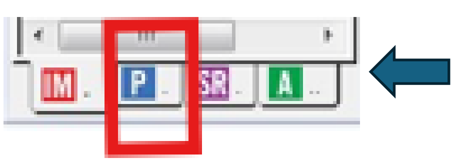
The **201 tab (Blue Tab)** is used to **locate and create Purchase Orders.**
Purchase Orders must exist before items can be received into the system.

While the layout of the 201 tab looks like the 301 tab, the purpose is different:

- 201 is used to find/create and or post POs (if one needs to be created)
- 301 is used to receive and post POs/GMs

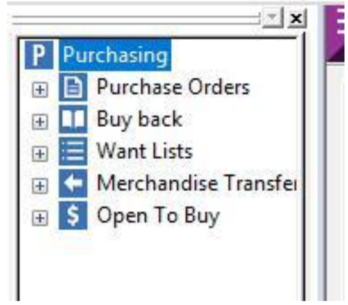
Accessing the 201 (Blue Tab)

1. Log in to Win Prism using your credentials.
2. Navigate to the 201 tab, also known as **Tab 2** or **Purchase Orders.**
3. This screen will look the same as the 301 tab, but 201 is used specifically to create and locate the POs used during receiving process or really any process while working within the bookstore.



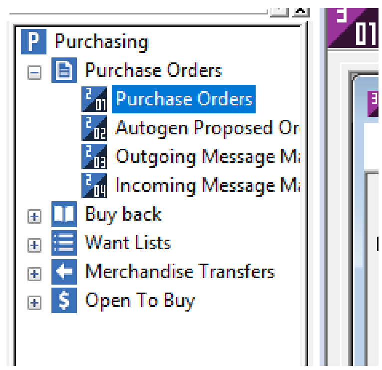
In the red circle is the blue tab or 2, this is within Win Prism and where we will find POs/GMs that **AREN'T** in 301

4. Once you click the blue tab or 2 tab it should look something like this:



Searching for PO/GM in 201

Click the **+ icon**, then select **Purchase Orders**. This will open the Purchase Order search screen.



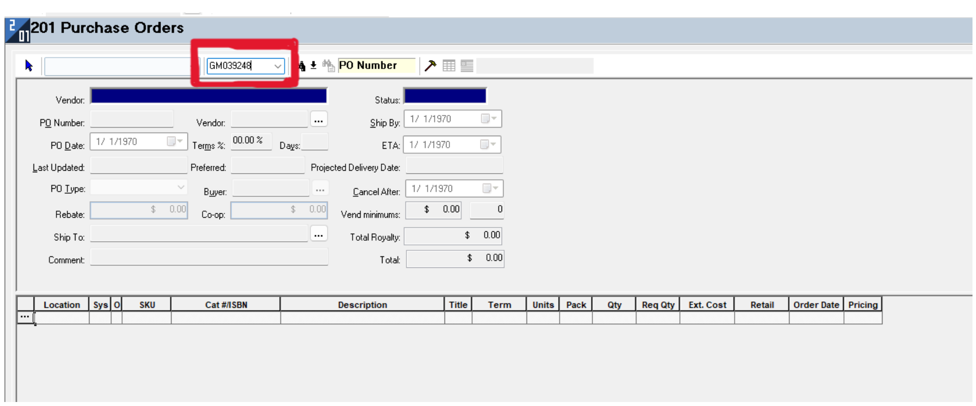
Depending on the information you have, there are **three different ways** to search.

Option A: PO/GM Available on Invoice

If the invoice already lists a **PO or GM number**:

1. Enter the PO/GM number directly into the search bar (located near "All Locations")
2. Press **Enter**

The PO/GM should appear if it exists in the system



(Above is how the 201 tab/ screen would look like if you searched using the PO/GM you have)

Once found, continue with printing the receiving document and preparing the order for verifying/counting.

Option B: Invoice Available, but No PO/GM Listed

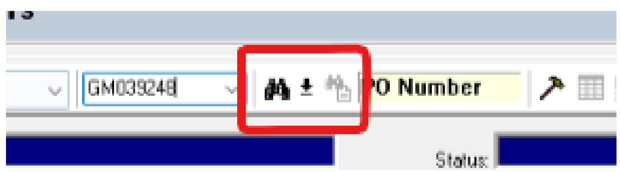
If an invoice is present but **no PO or GM number is listed**, use item-level information from the invoice to search.

You may use:

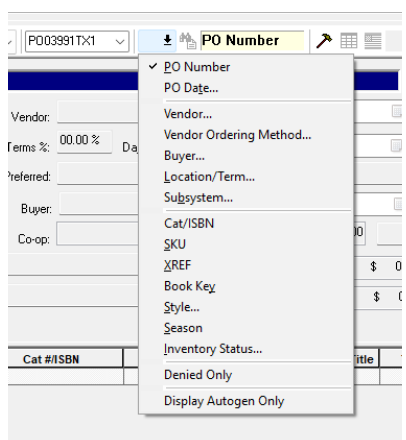
- **XERF / Barcode**
  (Example: 073390009137)
- **SKU or Catalog Number**
  (Vendors label this differently; for example, Core-Mark uses SKU numbers like 43364)
- **Item Description**

How to Change the Search Field in 201

1. While in the 201 tab, locate the search bar near “All Locations”
2. To the right of the search bar, you will see:
   - A **binoculars icon**
   - A **downward arrow**



3. Click the **downward arrow**
4. A list of search options will appear:



5. Select the appropriate option (SKU, Vendor, Description, etc.)

Once selected, the highlighted search field will change from **PO Number** to the option you chose.

This same process can be used to search by:

- SKU
- Vendor
- Description
- Other available fields

Enter the information and press **Enter** to search.

Option C: No Invoice Available

If **no invoice is available**, but the **vendor's name is known**:

1. Identify the vendor from the shipping label on the box
2. Search by **Vendor name** in the 201-tab using the same dropdown method described in Option B
3. Review results to locate the correct PO/GM

If needed, refer to **Option B** to narrow results using item-level details.

After You Find the PO/GM

Once a PO/GM is located using **Option A, B, or C**, follow the steps below:

If the PO/GM Is Empty:

- Create the PO/GM using the invoice information you have
- If unsure, ask a **shift lead or manager** before proceeding

If the PO/GM Is Not Empty:

1. Confirm with a **shift lead or manager** that:
    - The PO/GM is correct
    - The items match what was received
2. Click the **hammer icon** to post the PO/GM

3. Click **Post**
4. Print the **Receiving Document**
5. Attach the printed document to the corresponding boxes

This process is the same regardless of how the PO/GM was found.

Use this section ONLY if Options A, B, and C do not work

Extra Notes: Last Resort (Red Tab – 101 / 102)

If **none of the options above work**, there is one final method that can help locate item information needed to complete **Option B**.

This involves using the **Red Tab (Tab 1)** in Win PRISM.

You may hear employees say:

- "Did you check 101?"
- "Try looking in 102."

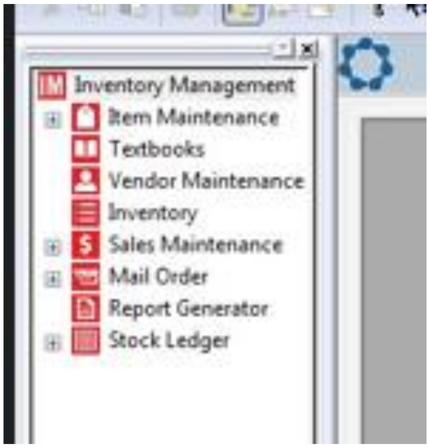
Understanding 101 vs 102

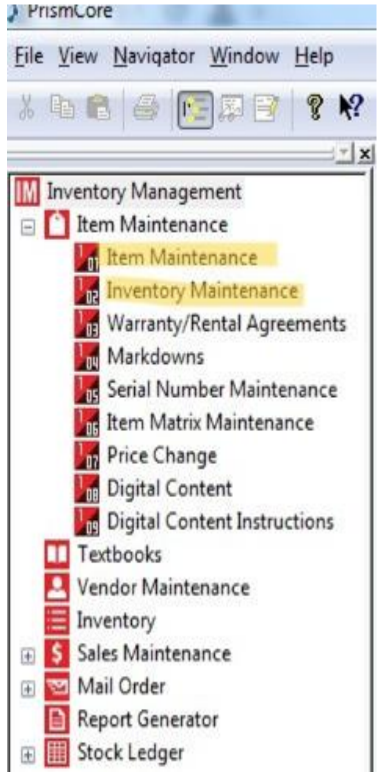
- **101 and 102 look nearly identical**
- **102 shows cost and retail**
- **101 does not**
- You **cannot add XERF/barcodes in 102**, only in 101

Finding an Item in the Red Tab (101 / 102)

Step 1: Click on the **Red Tab (Tab 1)**.
You will be taken to the main Item Maintenance screen.

Step 2: Click the first "+" option, labeled Item Maintenance.



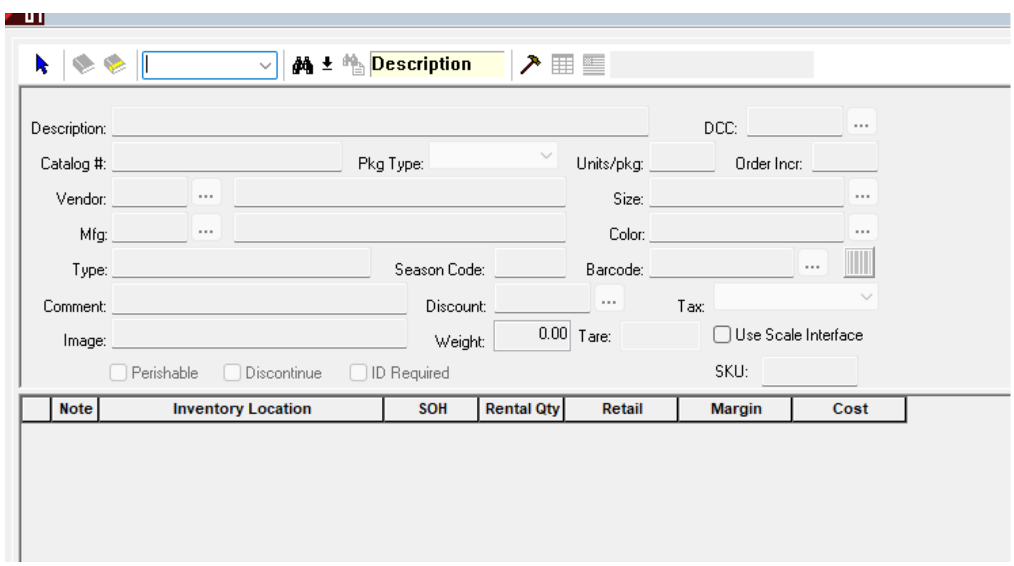


Step 3: Select either 101 or 102.

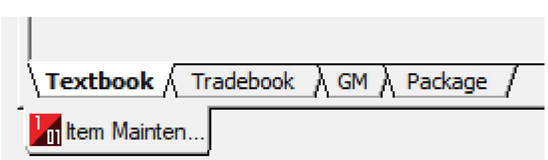
Once opened, locate the tabs at the bottom left of the screen.

IMPORTANT: Make sure you are on the GM tab, unless you are searching for a textbook.

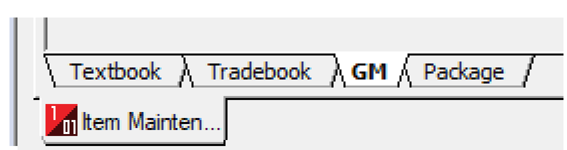
To the right is how the screen of 101 will look like:



Below is how the tabs look like when you first click on 101:



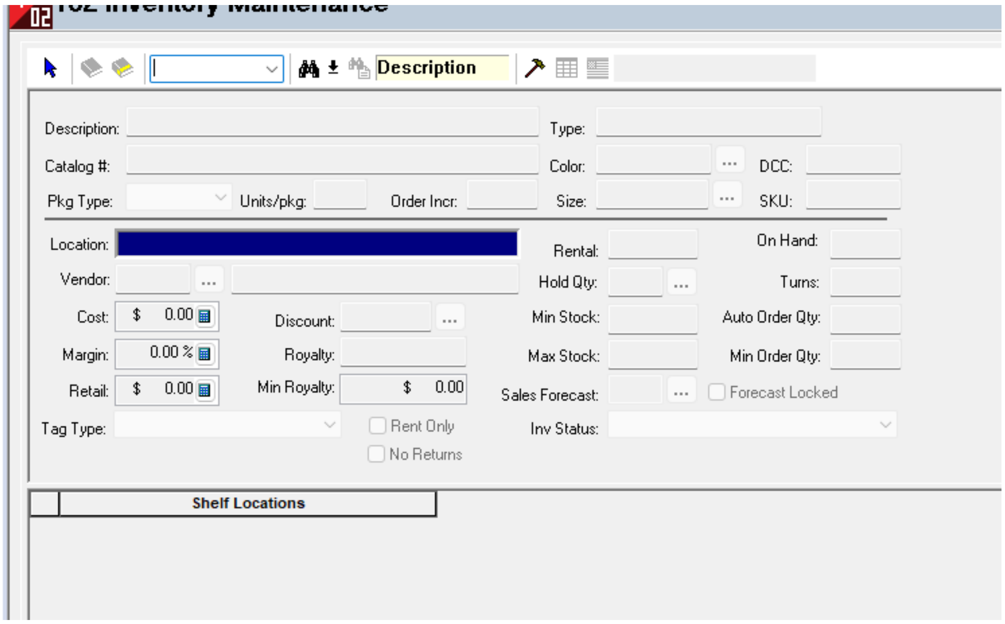
But then make sure you click the GM tab



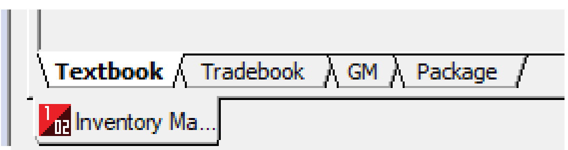
Below is how the screen will look like when you click on 102

REMINDER!

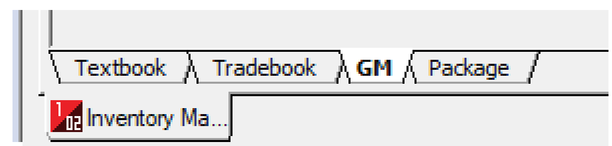
Either 101 or 102 are good to use when find an item



Below is how the tabs look like when you first click on 102:



But then make sure you click the GM tab



Step 4: In the search bar, click the downward arrow and ensure the search field is set to Description.

Step 5: Use the symbol “%” for a narrower search.

Example:

If searching for a blue pen, type:

%PEN%BLUE% (ADD PIC)

The % symbol allows the system to return any item that contains both words in its description.

Step 6: Press/hit Enter. The system will display one result at a time.

Step 7: To view additional results:

- Use the **green/black navigation arrows**, or **(ADD PIC)**
- Click the **binoculars with paper icon (ADD PIC)**

Step 8: Once the correct item is found:

- Copy the **SKU**, **Catalog Number**, or **XERF**
- The safest option is to copy the **SKU**
- Return to **201** and complete **Option B**

Reminder

Option B (searching by SKU, XERF, or description) can also be used within the 301 tab in certain situations.

When in doubt at any point, stop and ask a shift lead or manager before proceeding.

Adding products into 301

The **301 tab**, also known as the **purple tab**, is used to create and manage POs/GMs that already exist within Win Prism. Most POs/GMs used during receiving should be located here first before moving to the 201 (blue tab).

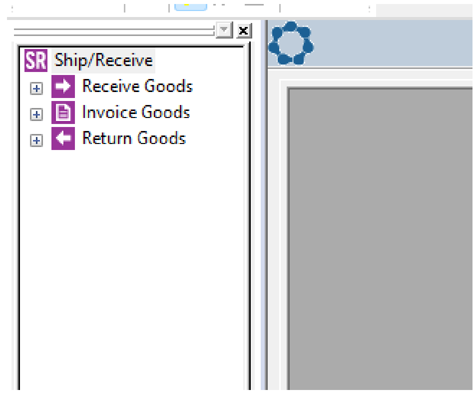
This section explains how to **create a PO/GM in 301** when one exists but is **empty or needs to be completed**.

Accessing the 301 (Purple Tab)

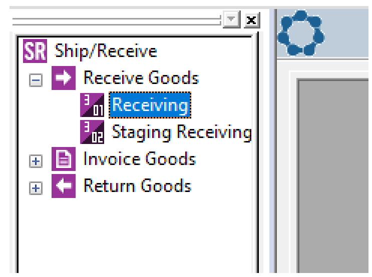
1. Log in to **Win Prism** using your credentials.
2. Navigate to the **301 tab**, also referred to as **Tab 3** or the **purple tab**.
3. This is the primary area used to locate and work with existing POs/GMs during receiving.

(Above in the red box is where you would find 301 or the purple tab)

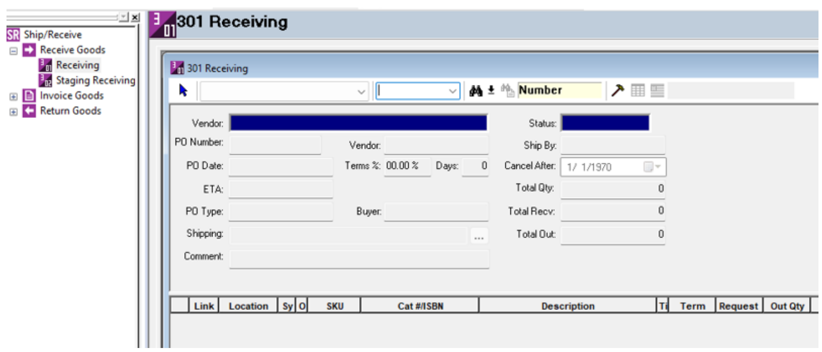
1. Once you click the purple tab you will see this screen. ➡



2. Click the + Receiving Good, once you clicked that you will see two options. click Receiving ➡



3. Your screen should now look like this:



Locating the PO/GM in 301

Before creating anything, always search to confirm the PO/GM already exists.

Use the search bar near the “All Locations” and use one of the following methods:

- **PO or GM number**, if available
- **Vendor name**
- **Item description**, if needed

Refer to “Finding POs/GMs in 201” to understand the process more.

If the PO/GM is found and contains information **check with a shift lead or manager**, then proceed with posting.

If the PO/GM is found but **empty**, follow the steps below to create it.

Adding items to the PO/GM

Once you have confirmed the PO/GM is empty:

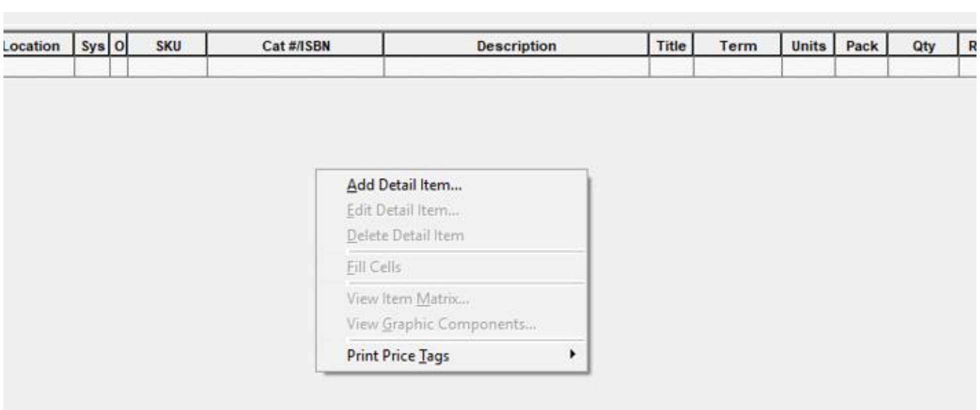
1. Open the PO/GM record in **301**.
2. Use the **invoice** to enter the required information, including:
    - Vendor
    - Item details
    - Quantities
    - Any additional required fields shown on the invoice.
3. Carefully verify all information matches the invoice before proceeding.

This step ensures accuracy before posting and prevents receiving errors.

BUT keeping this in mind we also must check within our system (Win Prism) if the item we want to add into the PO/GM has already been created.

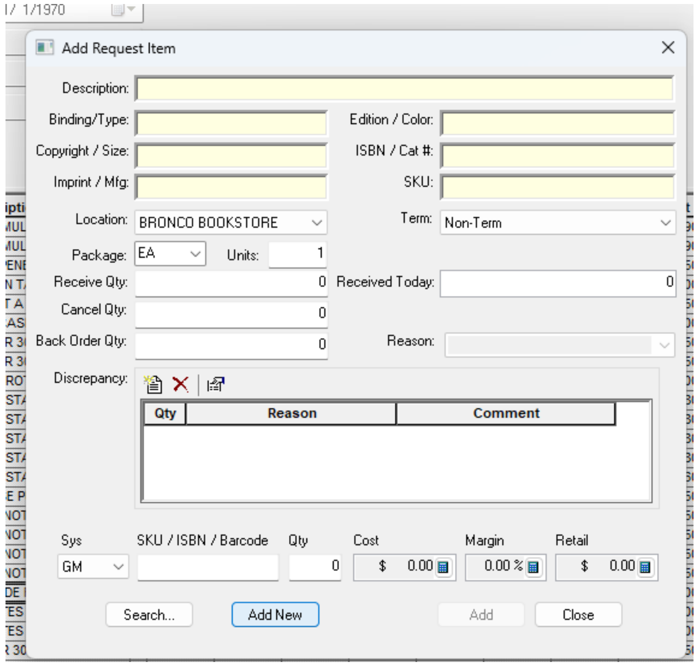
How to do add an existing item:

1. Within the same page as step 6 in Accessing the 301 we want to right click anywhere with the page for example like this:

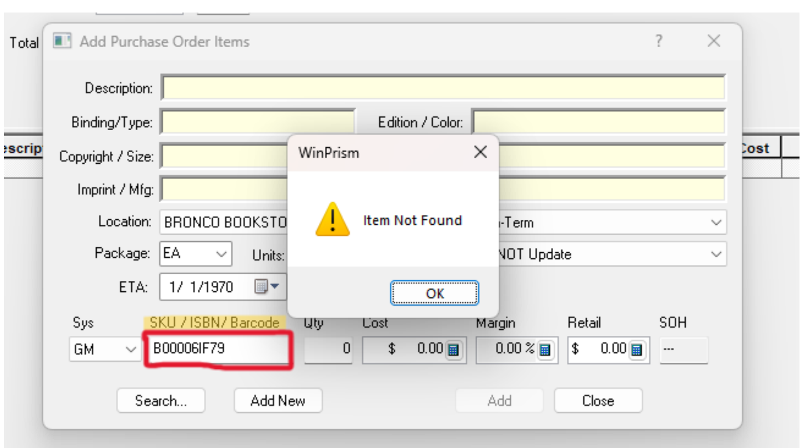


(As you can see, we have an option of “Add Detail Item” that is where we want to be to find if the item we are trying to add to a certain PO/GM already existed or needs to be created. We also have many different options to choose from, but we can get into this later.

2. Once you click on “Add Detail Item” you should now see this prompt:



3. While within the prompt of step 2 we want to add the product, we are trying to find/add. For this example, let’s say we have the catalog # plug it into the “SKU/ISBM/BARCODE.” Below is a pic of that section highlighted and within the red box is a catalog number. As you can also see, there is an error message meaning when we click enter our system or Win Prism didn’t find anything within the catalog # category of our system.



4. Since that didn't work, we still have 3 more ways to search and see if an item we are trying to add is in our system BEFORE we make a new one.

Refer to "Finding POs/GMs in 201" to understand the process.

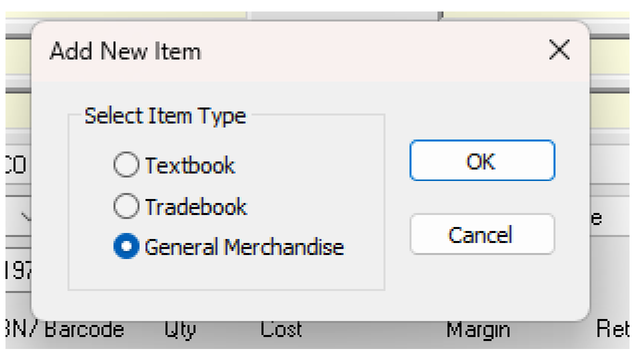
Reminder this step is crucial and should be done before creating a new item, there have been many steps where someone will create a new item that already exists and now our inventory is messed up.

Making a brand-new SKU

If you did the other steps that are included in "Finding POs/GMs in 201" and still haven't found the item, you are trying to add. Below are the steps on how to do that **WHILE** within 301.

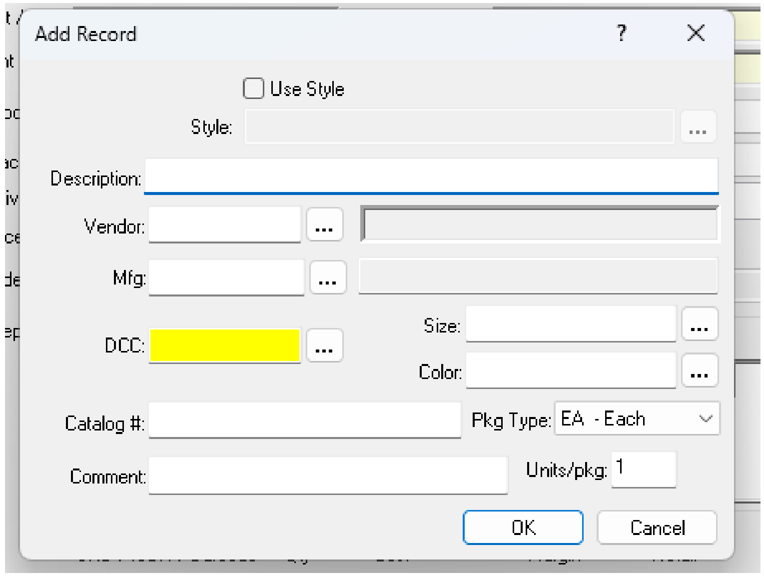
Step 1: While are you on the same page or area as step 3 from **How to do add an existing item:**. Near the bottom left corner, you should see two buttons "Search" and "Add New." Please click "Add New."

Step 2: You should them be given this prompt:



We must ALWAYS click "General Merchandise" we will never use the other unless someone ordered you too but for now, please keep in mind that you are ALWAYS clicking "General Merchandise."

Step 3: Once you click the “OK” button you should then be led to this prompt:



As said before from **Adding items to the PO/GM**, we need all the information from that section; Which includes the Item Description, Vendor code, Mfg. code, DCC, color if it has a color, Size if it’s a food item (Ex. 12 OZ), catalog #, and Units/pkg.

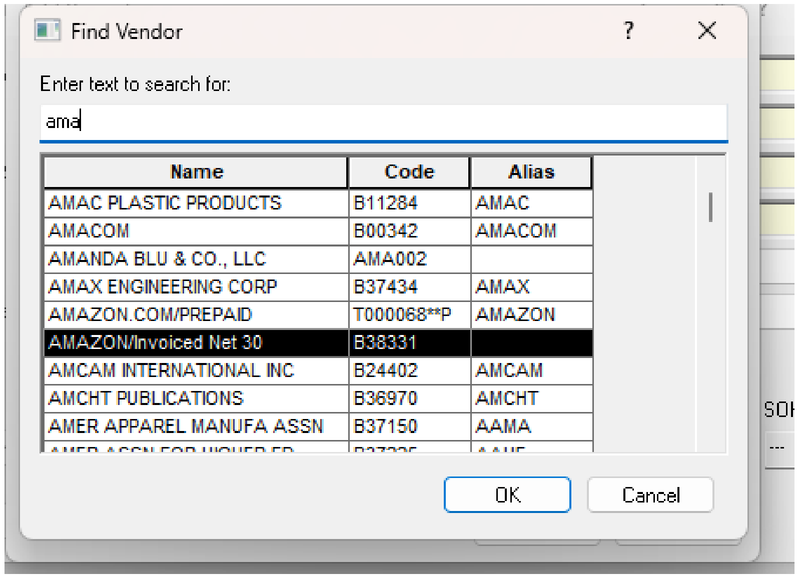
Below are the reasons why we need this information:

- Item Description: Is obviously to know what item which item is KEEP IN MIND when you are typing this Item Description IT MUST BE IN CAPS. WE MUST ALWAYS TYPE IN CAPS, never LOWER CASE. If you are ever confused about what to write based on the situation you can copy it from the invoice if you have one OR ask a lead/ manager

  OR if you feel comfortable enough you can create a description if it is obvious to what the item is.

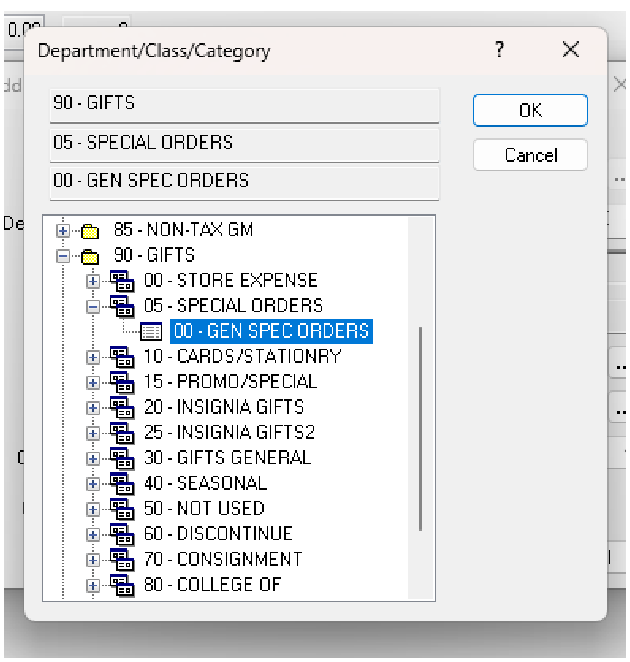
- Vendor Code: if you look within step 3 never vendor code there are 3 dots to the right.

Once you click those 3 dots you should be given this prompt



If you notice within the pic "Name" is the first option which in the "Enter text to search for" someone is type ama which is for AMAZON/Invoiced Net 30 BUT when this prompt opens up "Code" will be the first option on how to move name to become the first option simple just grab the name section and push it all the way to the left which we make "Name" first. Then you can begin searching.

- Mfg. code: We don't have to really worry about this so we can just copy and paste the vendor code into the Mfg. code or type whichever is easier for you.
- DCC: DCC stands for department class category, what that means is that you are categorizing items to fit within our system for example.



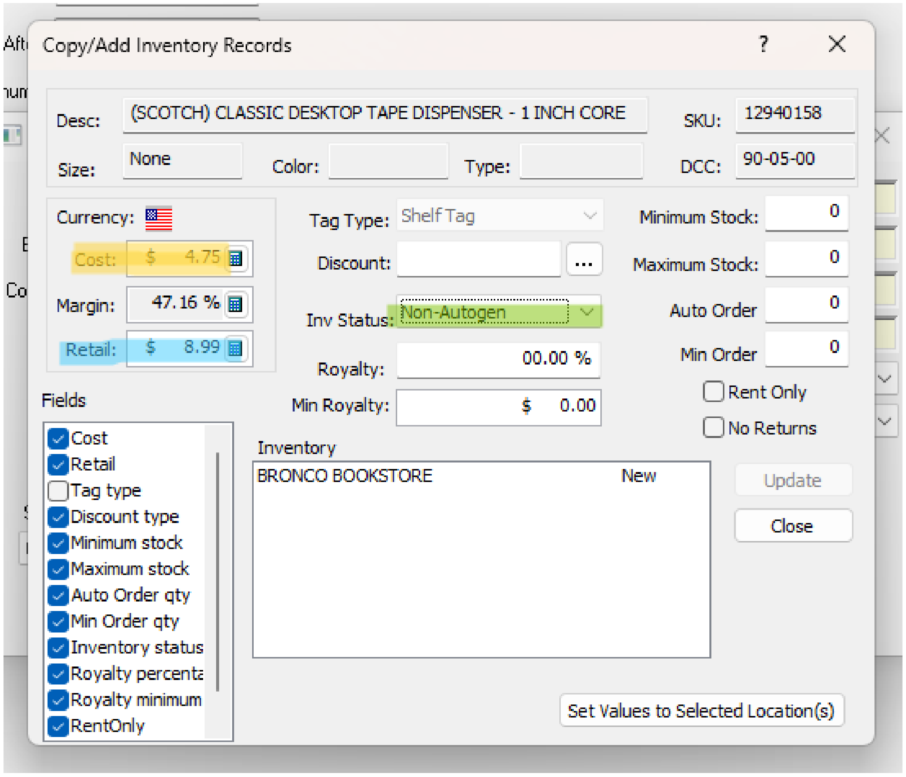
As you can see to the left this is how the 3 dots near the DCC prompt looks like when you click it. Depending on the item at hand you will click what is need for this example we are creating a Gifts (90), and it is a Special Order (05) so it will go in General Special Orders (00).

If you are confused at any moment of this, please seek out a lead or manager and they can help!

As you can see all these examples help correlate what goes with what BUT if you have any questions please seek your team lead or manager and they can guide you.

- Color/ Size: This is just asking if the item has a color or size if it doesn't you can leave it blank if it does, please add it.
- Catalog #: Is QUITE important if you have an invoice, you can use the catalog # it has if you don't have an invoice but there's a barcode most of the times the catalog # shows right above it. IF that doesn't work, we can always use the internet to help us. IF THAT DOESN'T work try asking a lead or manager and if nothing else works leaving it blank is okay but we must do the if states.
- Units/Pkg.: Just means if it comes in a pack so like there will be items that when you count them come in two different boxes but within one box it has 6. Adding up to 12 in total, things like this is when you would put 6 in the Units/Pkg: section. If all comes in separately 1 within the units/Pkg is good as well. But for extra precautions asking your lead or manager is always helpful as well.

Step 4: Once all this is done you can press okay; Then we will move on to adding the cost and retail of the item. This is the prompt you should see:

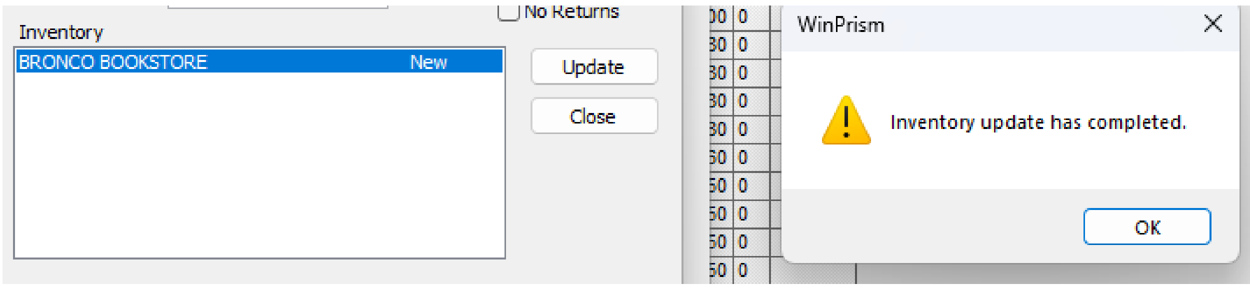


In the yellow highlight we have the cost of the item; How we find this depends on what we have so if we have an invoice the invoice will usually tell us. In a section that says Cost Per Units OR it will say Ext. Cost which means the total of the items. For example, if something cost $12 dollars for 6 items, we would do the math by doing 12.00 divide by 6 which equals $2 dollars which is our cost.

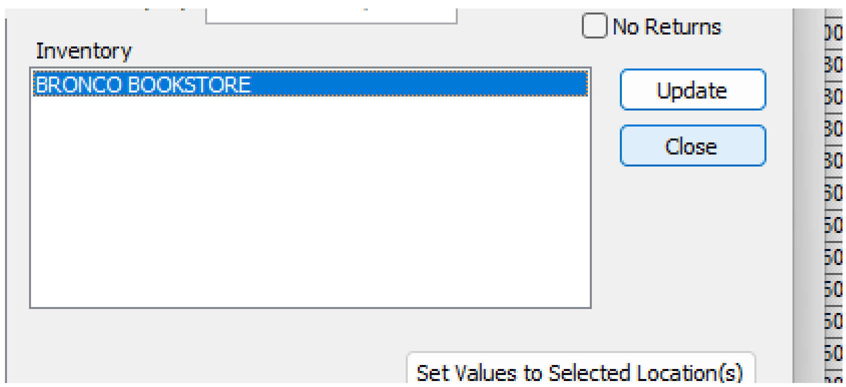
In the green highlight is our inv starts. Which means if the item we are creating can be 1. Active, 2. non-Autogen, and our 3. discontinued. If you are making an item for GM, you can leave it as Active unless said differently from a higher up.

In the blue highlight is our retail. How we get our retail is going based on the math we just did so if our cost was $2 we would times that by 2 which equals 4 **BUT**, in the bookstore, **SPECIFICALLY** general merchandise (GM) we **ALWAYS** do either 4.49 or 4.99 whatever it is so that or Margin which you see between cost and retail is above 50%.

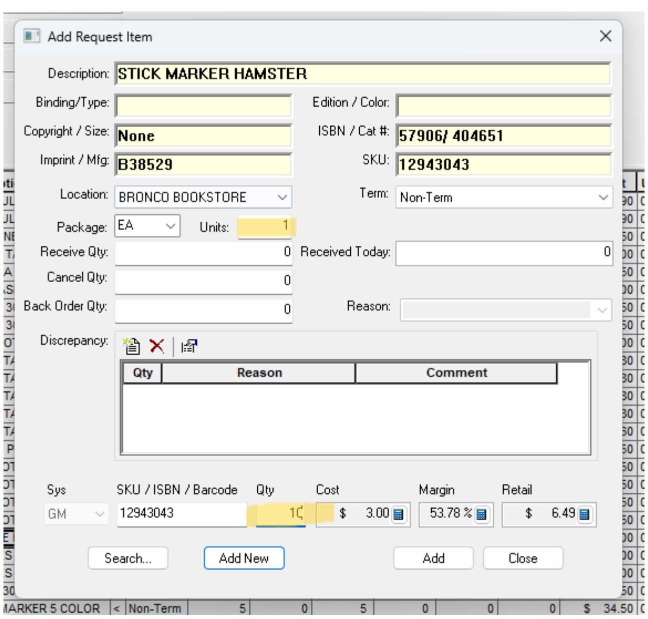
Step 5: Once you are done with adding all the pricing and such now it is time to save the item if you notice near the bottom there is “BRONCO BOOKSTORE” in caps click it then click update. You will see a Win Prism pop up saying the following below, simply press okay leading to the next step.



Step 6: When you click okay from the “Inventory update …” Click “BRONCO BOOKSTORE” in caps again but instead of clicking “Update” click “Close.”



Step 7: When you click “Close” you should now see this prompt:



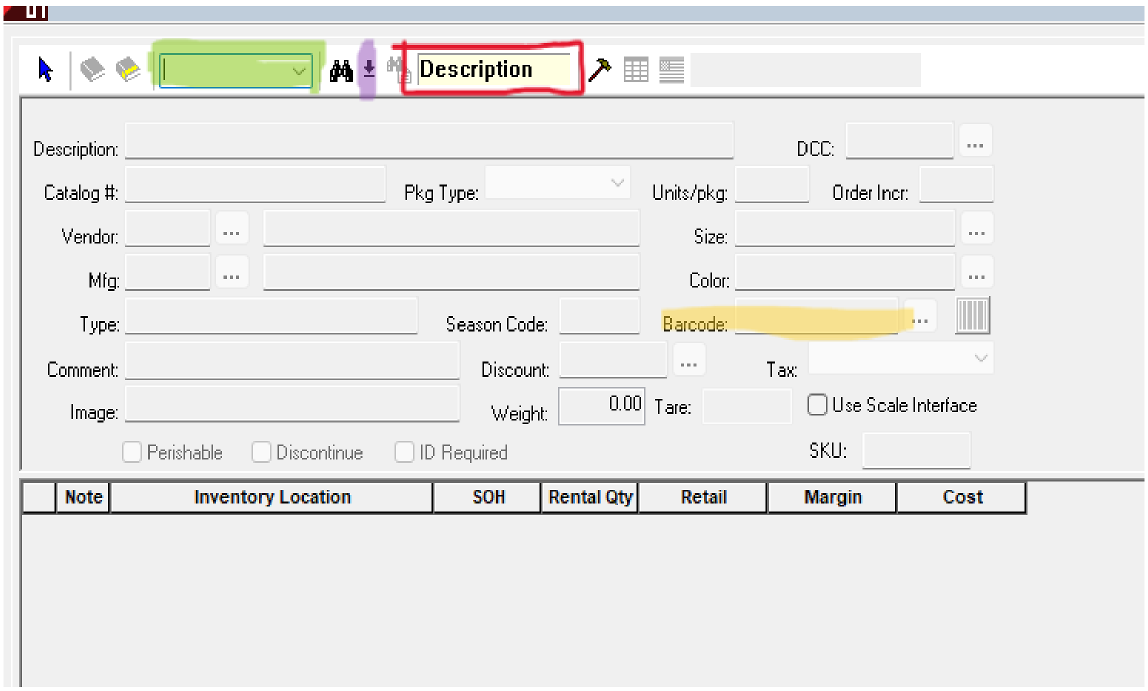
Like we talked about in Step 3 above where we talking about the Units/Pkg section as you can see this item as a Unite of 1 but ON the bottom near the “SKU/ISBN/Barcode” to the right is a “Qty” we are adding 10 items of qty so now when we post the PO/GM we need to verify/ count that there are 10 items of this item.

ONCE this is done click “Close” on the right corner and you officially created a new item!

Adding an XERF to an item

How to add an “XERF” or “Barcode to an item will be using the red tab or 101. Please refer to “Finding POs/GMs in 201” to understand 101 a little more. But basically, the process is.

1. Go to the red tab or 101 and make sure you are on the GM tab.
2. Using the pointing down arrow near the yellow box that says “Description” within the pull-down arrow choose “SKU” now within that yellow box it should say “SKU.”
3. Near the top there are two little box to the left is the search box enter the “SKU” of the item you are trying to add the XERF too. Then press enter you should now see the item pop up.



(The picture above is a visual to highlight the difference between the steps. In the green highlight is the “search bar” where you would type the “SKU.” In the purple highlight is the pointing down arrow which will give you the different categories to search by. In the red box is where that category would show you make sure you are searching by description, SKU, XERF, etc. Then lastly in the yellow highlight is where you will add the “Barcode”)

Posting the PO/GM

After the PO/GM has been completed:

1. Click the **hammer icon** within the PO/GM.
2. Select **Post**.
3. Once posted, print the **receiving document** associated with the PO/GM.
4. Attach the printed receiving document to the corresponding boxes.

This document must stay with the boxes until the receiving process is complete.

Reminder

- Always search for **301 first** before using the 201 tab.
- Do not post a PO/GM until all information has been verified against the invoice. Unless said otherwise from your lead or manager. Since you are new, please always ask the people around you for help.
- Printed receiving documents must match the boxes they are attached to.

Common Mistakes

- Creating a PO/GM without checking if one already exists
- Posting a PO/GM before verifying invoice details
- Attaching the wrong receiving document to boxes
- Skipping the print step after posting

What to Do If You're Unsure

If you are unsure whether a PO/GM should be created or how to proceed:

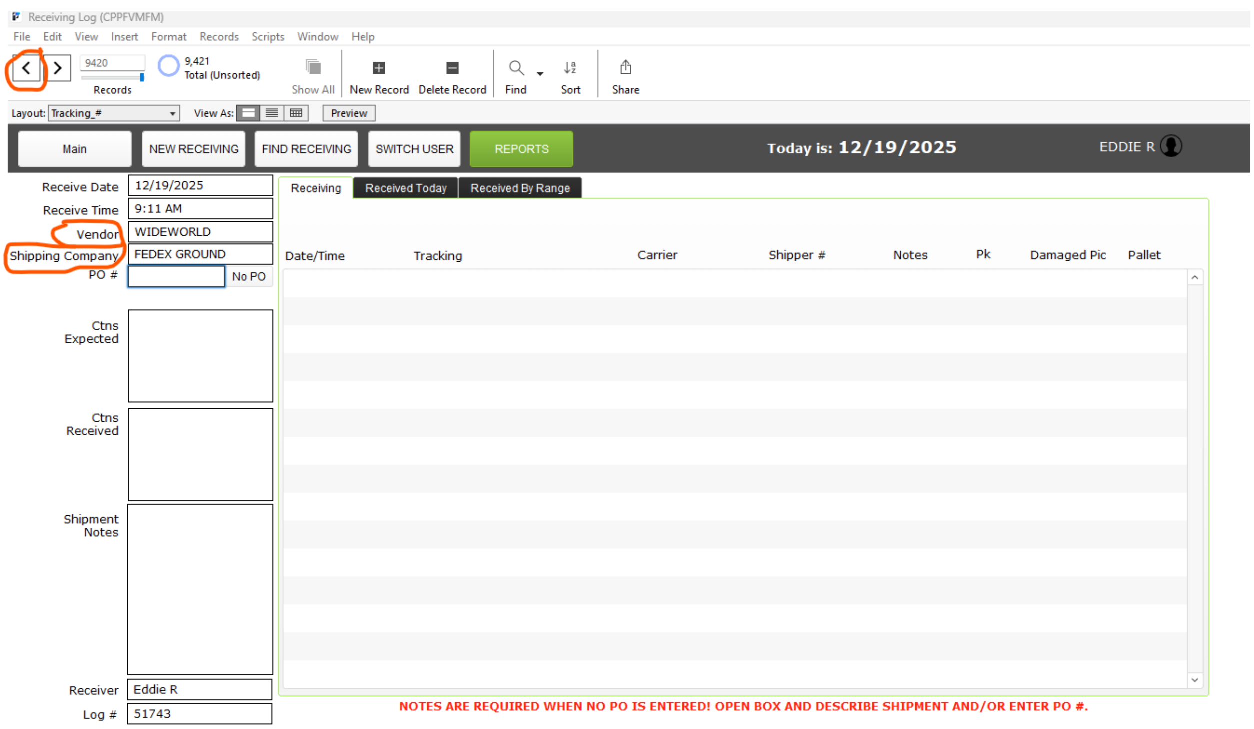
1. **Pause the process** = do not guess.
2. Review the invoice and PO/GM information again.
3. Ask the Lead**, Receiving Manager, or GM Manager** for clarification.
4. If still unclear, **set the boxes aside** and notify the team via chat.

How This Fits into Receiving

- **301 (Purple Tab)** → Used first for existing POs/GMs
- **201 (Blue Tab)** → Used if the PO/GM is not found in 301
- Both processes end with **posting, printing, and attaching documents.**

Extra Notes

- If you want to go back and check a previously received order, simply make sure that there is a vendor AND shipping company name input into both fields (it could be any name or text). After inputting information, simply click on the back arrow to view previously checked in orders.



(Simply enter a vendor and shipping company name, or any text and click on the back arrow)

- When checking in different shipments (Fed Ex first, then UPS for example), and boxes on those separate shipments contain the same GM or PO numbers, simply revert to a previous receiving check in on the receiving log and update the box count and add the new tracking numbers.