

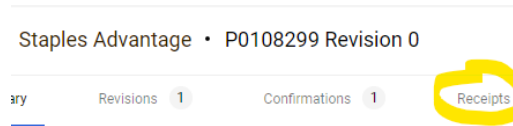
PROCUREMENT LOGISTIC SERVICES TIP SHEET

MT\$OURCE – STAPLES RECEIPTS AND RETURNS

RECEIVING YOUR ITEMS

Create a Quantity Receipt in MT\$ource for Staples orders.

- a. Open your Purchase Order
- b. Click on Receipt tab



- c. Click on “+” sign



- d. Choose “Create **Quantity Receipt**” (items are received by quantity)

Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	--	Staples Laser/Inkjet Address Labels, 1" x 2 5/8", White, 30 Labels/Sheet, 100 Sheets/Pack, 3000 Labels/Box (18057/SIW0100)	479880	BX	10.68	1 BX	10.68	✓
2	--	Staples Hardboard Clipboard, Letter Size, Brown (44292)	1671406	EA	1.79	2 EA	3.58	✓
3	--	Brother P-Touch PTM95 Portable Label Maker	2244739	EA	25.49	1 EA	25.49	✓
4	--	Brother P-Touch M-231 Label Maker Tape, 1/2" x 26-2/10", Black on White (M-231)	730788	EA	6.97	2 EA	13.94	✓

At the bottom of the dialog box, there are three buttons: 'Create Quantity Receipt' (highlighted in blue), 'Create Cost Receipt', and 'Cancel'.

For the most part, you will receive all items ordered.
However, there are different scenarios that can occur.
Please follow directions below for each.

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1. ALL ITEMS RECEIVED on one Purchase Order,

All Line Items will be checked in the “Create Receipt” window

Click on “Create Quantity Receipt”

Scroll down to P0 block

The quantity ordered will be in the “Quantity” box.

If a different number of items received, enter the correct number.

Complete the Receipt

2. SOME LINE ITEMS RECEIVED AND OTHER LINE ITEMS NOT RECEIVED on one Purchase Order:

YOU MUST FIRST REMOVE THE LINES FOR ITEMS NOT RECEIVED

All Line Items will have a “green” check mark in the “Create Receipt” window

Uncheck the marks of the Line item(s) you **DID NOT** receive

Click on “Create Quantity Receipt”

You will then have a list of the Line Items you **DID** receive.

Make sure the Quantity received is the Quantity you ordered.

If a different quantity received, change the number in the “Quantity” box, then follow the instructions in #5 below.

Complete the Receipt

3. REMAINING ITEMS ARE RECEIVED on a Purchase Order,

Create a New Quantity receipt (see #2 above)

Complete the Receipt

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4. **CREATED A RECEIPT FOR ITEMS NOT RECEIVED** (did not receive it in your box)

Create a **New negative (-) Quantity Receipt**

First – Uncheck the marks of the Line item(s) that were received correctly

Click on “Create Quantity Receipt”

You will be left with the Line Item(s) you mistakenly included in the original Receipt

Change the number in the “Quantity” box to “ - # “ - to cancel out the previous mistake (e.g. “-1”

Complete the Receipt

5. **QUANTITY RECEIVED** is not the Quantity ordered (packing slip discrepancy)

Contact Staples Customer Service and inform them of the issue.

Request the status for items you **did not** receive and follow their instructions.

Online:	www.StaplesAdvantage.com Under “Help”, click “Customer Service” to chat live
Email:	support@staplesadvantage.com
Phone:	1-877-826-7755 (M-F 8am-8pm ET)

Place a “Comment” on the Purchase Order to Tracey Howard and Sandra Campbell indicating what actions Staples will be taking regarding the status of the items.

(email Sandra.Campbell@mtsu.edu for assistance)

NOTE: If an item is available to order (not on backorder), place a NEW ORDER for this item from Staples.

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USING ORDER HISTORY TO CHECK ORDER STATUS

Some items in your order may be shipped by different carriers. (FedEx, UPS, etc.)

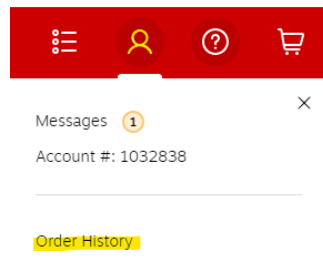
If you did not receive all the items ordered, check your “Staples Order History.”

Log in to MTSource

Choose Staples Punchout

Click on your Person icon (top right of screen)

Choose “Order History”



If you cannot see your order history, email Sandra.Campbell@mtsu.edu for assistance.

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STAPLES - RETURNING ITEMS – (NOT BILLED TO A PCARD)

NOTE: DO NOT USE the “Returned” Status when doing this step.

1. Create a Quantity Receipt – you received the item in the box but it was damaged, did not work as expected, etc.

(follow the steps on page 1 – Receiving your Items)

2. Contact Staples Customer Service to return the items.

Staples PunchOut: Order History
Online: www.StaplesAdvantage.com
Under “Help”, click “Customer Service” to chat live
Email: support@staplesadvantage.com
Phone: 1-877-826-7755 (M-F 8am-8pm ET)

3. Wait a day or two - the Invoice needs to post to the Purchase Order. Proceed with the next step after you see a number next to the Invoice tab.

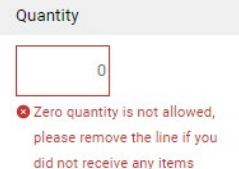


4. After the Invoice posts, do a NEGATIVE QUANTITY RECEIPT for the item(s) you are returning:
 - a. Open PO
 - b. Click on Receipts tab
 - c. Click on “+” sign

Uncheck the marks of the Line item(s) that were received correctly

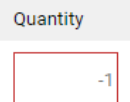
Click on “Create Quantity Receipt”

All Line Items will appear. There will be a message under the Quantity section that says “Zero Quantity is not allowed ...”



Enter the **negative number of the item(s) returned** in the Quantity box

Complete the Receipt



(continued on next page)

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5. When you receive Email Notification from Staples about your credit:

Save the Email as a PDF:

(Tip: Double click on the email to open it, then File → Save as Adobe PDF)

Make a Comment on the Purchase Order

- a. Open PO
- b. Click on Comments tab
- c. Click on “+” sign to Comment on the Purchase Order

Perform the following steps below (a, b, and c):

ADD COMMENT

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) **Add recipient**

Lolitia Simmons (Prepared by, Prepared for)
<Lolitia.Simmons@mtsu.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

File **b** **Choose File** ACEStaplesReturn.pdf

a. Add Email notification – click on Add Recipient

Search for Recipient by ONE of the fields in User Search

From the list, choose the person you want to notify by clicking on the “+” sign in the Action column (i.e. your Accounts Payable contact, your Approver, etc)

(Add “Sandra Campbell” as a recipient for a Procurement Contact)

b. “Choose File” – find the PDF you saved and “open”

c. Click on the “Check Mark” at the top of the Comment window to complete and send the comment.

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STAPLES - RETURNING ITEMS – (BILLED TO A PCARD)

1. Contact Staples Customer Service to return the items.

Staples PunchOut: Order History
Online: www.StaplesAdvantage.com
Under “Help”, click “Customer Service” to chat live
Email: support@staplesadvantage.com
Phone: 1-877-826-7755 (M-F 8am-8pm ET)

2. Make a Comment on the Purchase Order
 - a. Open PO
 - b. Click on Comments tab
 - c. Click on “+” sign to Comment on the Purchase Order

Show comments for +

Add Email notification – click on Add Recipient

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s)

Search for Recipient by ONE of the fields in User Search

From the list, choose the person you want to notify by clicking on the “+” sign in the Action column (i.e. your Accounts Payable contact, your Approver, etc)

Add “Sandra Campbell” as a recipient for a Procurement contact

Enter this Comment in the box – “This PO can be closed; all items received or returned.”

3. Follow up on your refund from Staples by checking your PCard/Truist bank statement.
 - a. Contact Staples Customer Service with any questions about the refund.