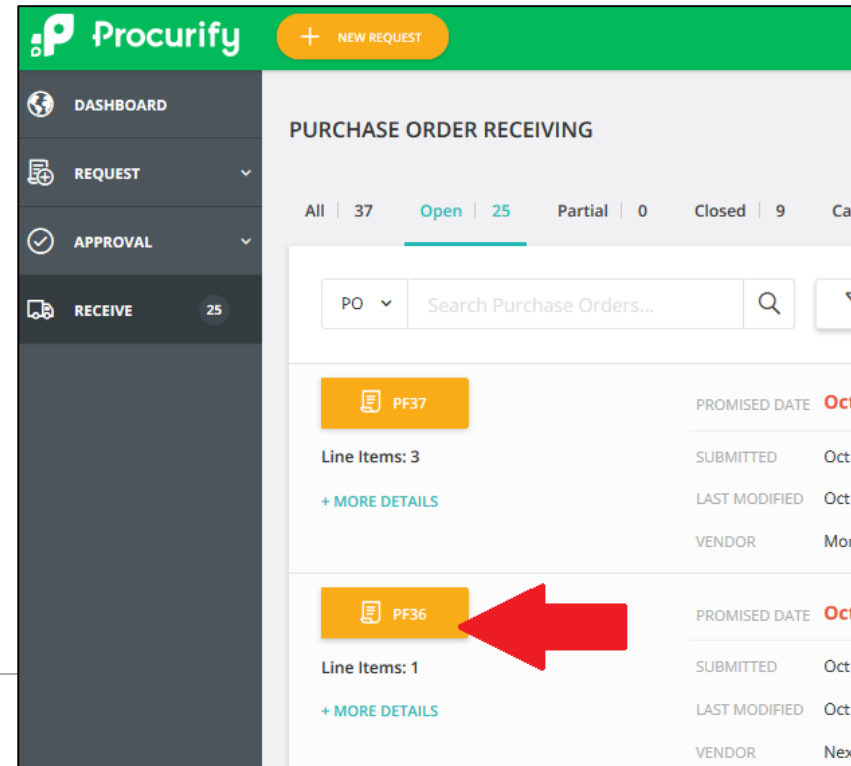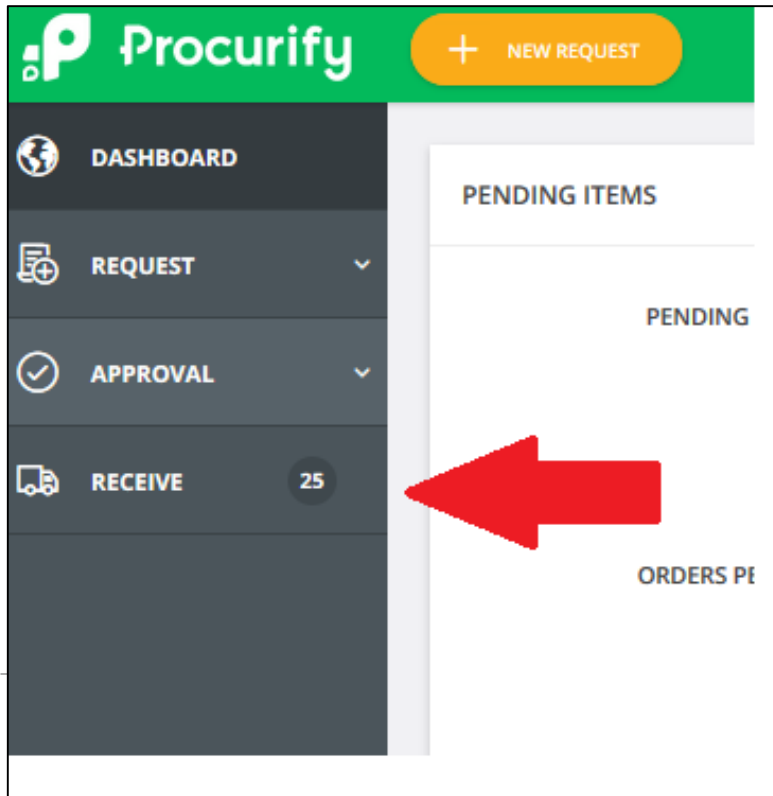# Welcome to Procurify

STEP BY STEP INSTRUCTIONS

FOR RECIEVING
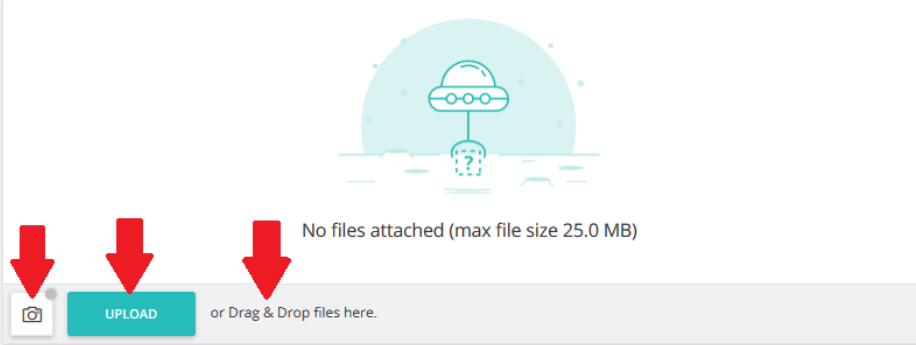
1. Begin by clicking on "Receive".
2. Find the Purchase Order and select it.

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OPEN

PURCHASED BY   Elena Taves

VENDOR

Packing Slip(s)

No files attached (max file size 25.0 MB)

[camera]   UPLOAD   or Drag & Drop files here.

Purchase Order Line Items

	ORDER	ITEM	WHO PURCHASES?	REQUIRE INFORMATION TECHNOLOGY REVIEW?	PASS	FAIL	RECEIVED		
1	RFO 40 - 1	SKU: n/a	EMPLOYEE	NO	0	0	0 / 3		...

ACCEPT ALL   RECEIVE ITEMS

3. There are 3 options when uploading a packing slip:
- Click on "Upload" and locate the file from your computer.
- You can drag & drop your file into the packing slip field.
- If you have the Mobile App installed on your smartphone, you can click on the camera button and take a picture of the packing slip with your phone. The picture will automatically upload."

4. If all items have been received, then click "Accept All", otherwise enter the quantity of items **received per the packing slip** by entering the amount in the "Pass" field. If items are noted on the packing slip but damaged or no longer required, enter the amount in "Fail" field.
*BackOrder and outstanding failed items are not to be recorded until received at a later date.
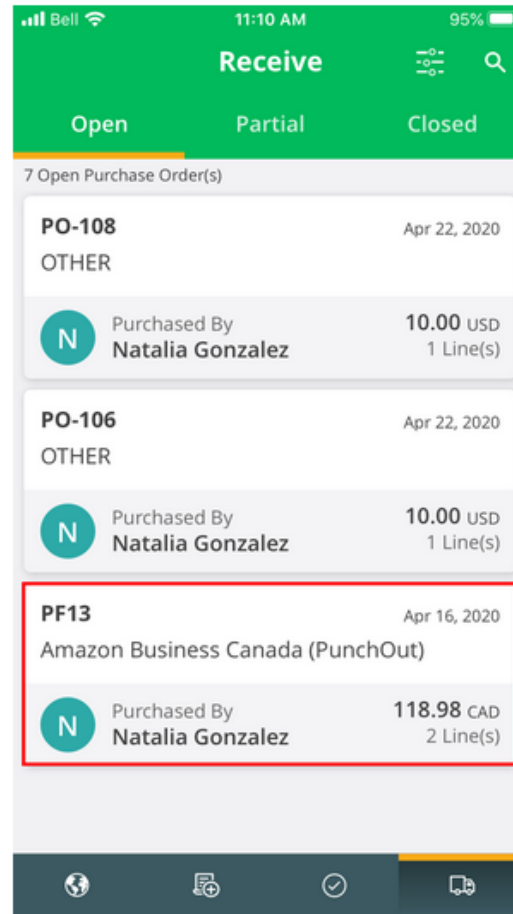
5. Click "Receive Items".

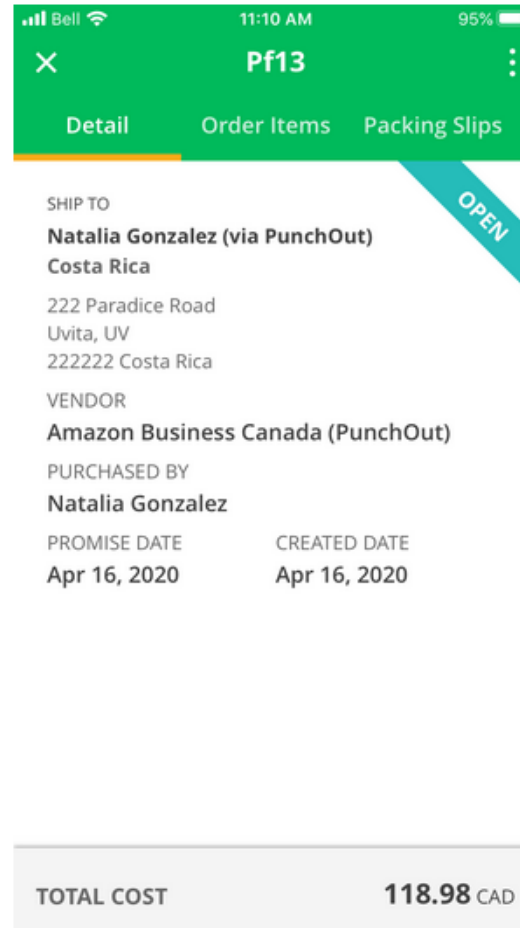# How to Receive & Unreceive Items Using the Mobile App

1. Launch the Procurify App and tap on the **Receive** button truck icon at the bottom of the screen.
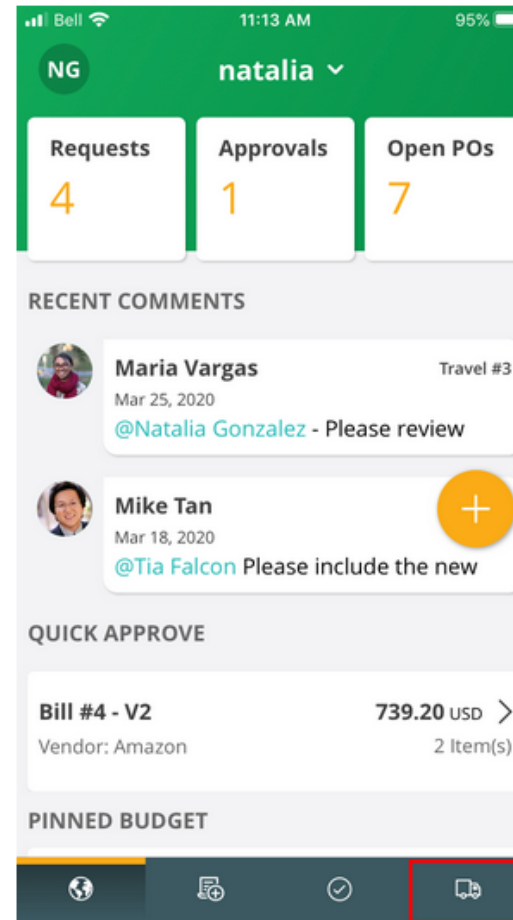
2. The following page will display open PO's. You can tap the top tabs in order to view Closed and Partially received PO's. Locate the PO you wish to receive and tap to open.

3. The following page will display PO details. You can scroll the top of the screen and tap the tabs to view Order items, Packing Slips and an Audit Log. To receive items, select **Order Items.** To attach a packing slip select Packing Slip and click the paper clip icon.

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4. The following page will display a list of order items. Select the Order Item you'd like to pass or fail. Order Items that have not been previously received or unreceived will be listed as Pending.

5. Pass or fail the item by tapping the empty field and populating the appropriate number of received or unreceived items and tapping **Receive Items**. To receive all items select the **Max** button and **Receive Items**. If you scroll the top tab of the following page, you'll notice the tabs Packing Slips, Comments and Audit Logs.
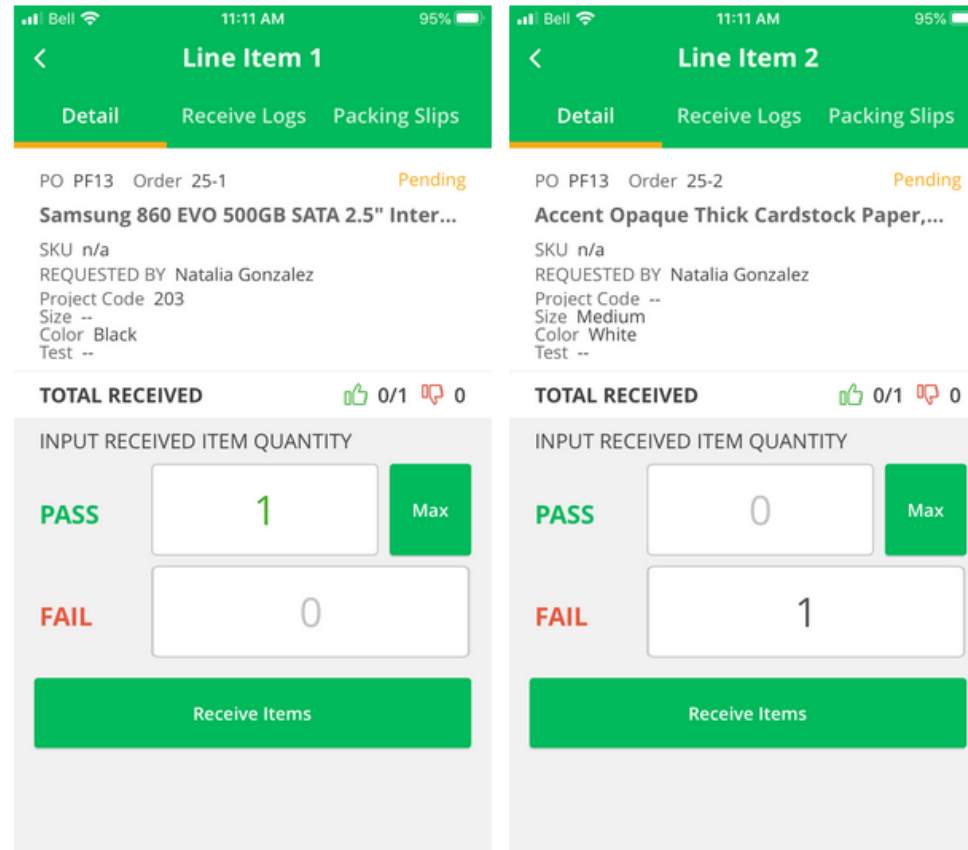
Once all items have been received, the PO will close. You've successfully completed the receive process!
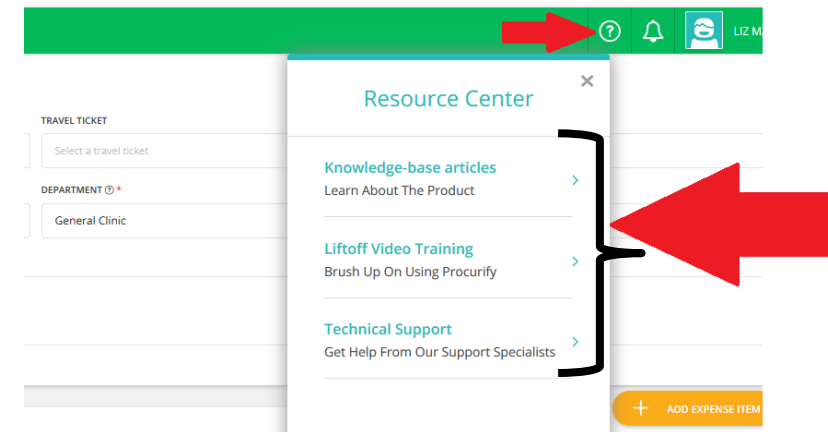
Help and Support

Several resources are available within Procurify for additional help which can be accessed at the top right hand corner of the home screen.

It includes the following:

- ☐ **Knowledge-Base Articles**
- ☐ **Liftoff Video Training**
- ☐ **Technical Support**

For all other inquiries a procurement helpdesk ticket must be submitted within the weCHC internal staff portal.