

# PROCUREMENT LOGISTIC SERVICES TIP SHEET

## MT\$OURCE – STAPLES RECEIPTS AND RETURNS

Staples Orders on the PunchOut are automatically invoiced and paid.

Do not use your Pcard as the method of payment.

### Table of Contents

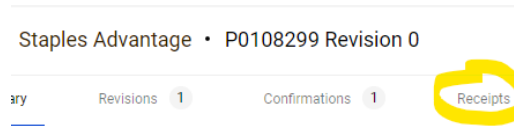
|  |   |
|--|---|
| <b>RECEIVING YOUR ITEMS</b> .....  | 2 |
| <b>ALL LINE ITEMS RECEIVED ON THE PURCHASE ORDER:</b> .....                                  | 3 |
| <b>SOME LINE ITEMS RECEIVED AND OTHER LINE ITEMS NOT RECEIVED ON THE PURCHASE ORDER:</b> ..  | 3 |
| <b>REMAINING ITEMS ARE RECEIVED ON THE PURCHASE ORDER:</b> .....                             | 3 |
| <b>FIXING A RECEIPT (Marked items received on a receipt but did not receive them):</b> ..... | 4 |
| <b>QUANTITY RECEIVED IS NOT THE QUANTITY ORDERED (packing slip discrepancy)</b> .....        | 4 |
| <b>STAPLES ORDER HISTORY</b> .....   | 5 |
| <b>PURCHASE HISTORY</b> .....  | 5 |
| Print Receipts for Orders.....   | 5 |
| Check Order Status .....   | 5 |
| <b>STAPLES - RETURNING ITEMS</b> .....   | 6 |

# PROCUREMENT LOGISTIC SERVICES TIP SHEET

## RECEIVING YOUR ITEMS

Create a Quantity Receipt in MTSource for Staples orders.

- Open your Purchase Order
- Click on the Receipt tab.



- Click on “+” sign.



- Choose “Create **Quantity Receipt**” (items are receipted 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/SIWO100) | 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      | ✓ |

Create Quantity Receipt Create Cost Receipt Cancel

## PROCUREMENT LOGISTIC SERVICES TIP SHEET

### ALL LINE ITEMS RECEIVED ON THE 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 are received, enter the correct number.

Complete the Receipt

### SOME LINE ITEMS RECEIVED AND OTHER LINE ITEMS NOT RECEIVED ON THE 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

### REMAINING ITEMS ARE RECEIVED ON THE PURCHASE ORDER:

Create a New Quantity receipt (see #2 above)

Complete the Receipt

## PROCUREMENT LOGISTIC SERVICES TIP SHEET

### FIXING A RECEIPT (Marked items received on a receipt but did not receive them):

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 a negative number to cancel out the previous entry (e.g., -1)

Complete the Receipt

### 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: | <a href="http://www.StaplesAdvantage.com">www.StaplesAdvantage.com</a><br>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](mailto: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.

# PROCUREMENT LOGISTIC SERVICES TIP SHEET

## STAPLES ORDER HISTORY

### PURCHASE HISTORY

Print Receipts for Orders

Check Order Status

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

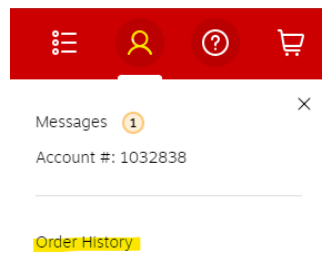
If you did not receive all the items ordered, check your “Staples Order History.”

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](mailto:Sandra.Campbell@mtsu.edu) for assistance.

# PROCUREMENT LOGISTIC SERVICES TIP SHEET

## STAPLES - RETURNING ITEMS

**Do not use the “Returned” Status on Receipt  
Leave Status as “Received”**

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

You must document the item was delivered.

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](http://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. **Complete 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 ...”

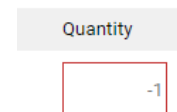


Quantity

❌ Zero quantity is not allowed, please remove the line if you did not receive any items

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

Complete the Receipt



Quantity

(continued next page)

## PROCUREMENT LOGISTIC SERVICES TIP SHEET

### 4. 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 in the bullet points below:

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

- **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)
- **“Choose File” – find the PDF you saved and “open.”**
- **Click on the “Check Mark” at the top of the Comment window to complete and send the comment.**