Inventory Receipts

Inventory Receipts

Purpose and when to use this record

Record what actually arrived against a purchase order, including partial receipts, quantities, costs, and warehouse destination.

At a glance

- **Identify it by: Status**, **Date Created**, and **Vendor Invoice #**.
- **Check its business context: Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order**.
- **Why care:** Warehouse, item, unit, quantity, and cost must describe the same physical movement. A wrong warehouse or unit can make availability and valuation misleading.
- **Why care:** Treat posted, processed, paid, reversed, and edit-locked states as controls—not ordinary descriptive fields. Confirm the source transaction before changing any state that the screen permits you to change.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on inventory receipts. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Create an Inventory Receipt

Create an Inventory Receipt only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order**.
2. Enter the identifying values shown on the form, especially **Status**, **Vendor**, **Warehouse**, **Date Created**, **Vendor Invoice #**, and **Bill Of Lading**, plus the remaining screen fields.
3. Review **Status**, **Edit Locked**, **Final Costs**, and **Apply Terms Discount** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Inventory Receipt, then confirm **Status**, **Date Created**, and **Vendor Invoice #** on its detail page before continuing.

After saving: Verify on-hand inventory and the purchase order's remaining quantity, then use the receipt when matching the vendor invoice.

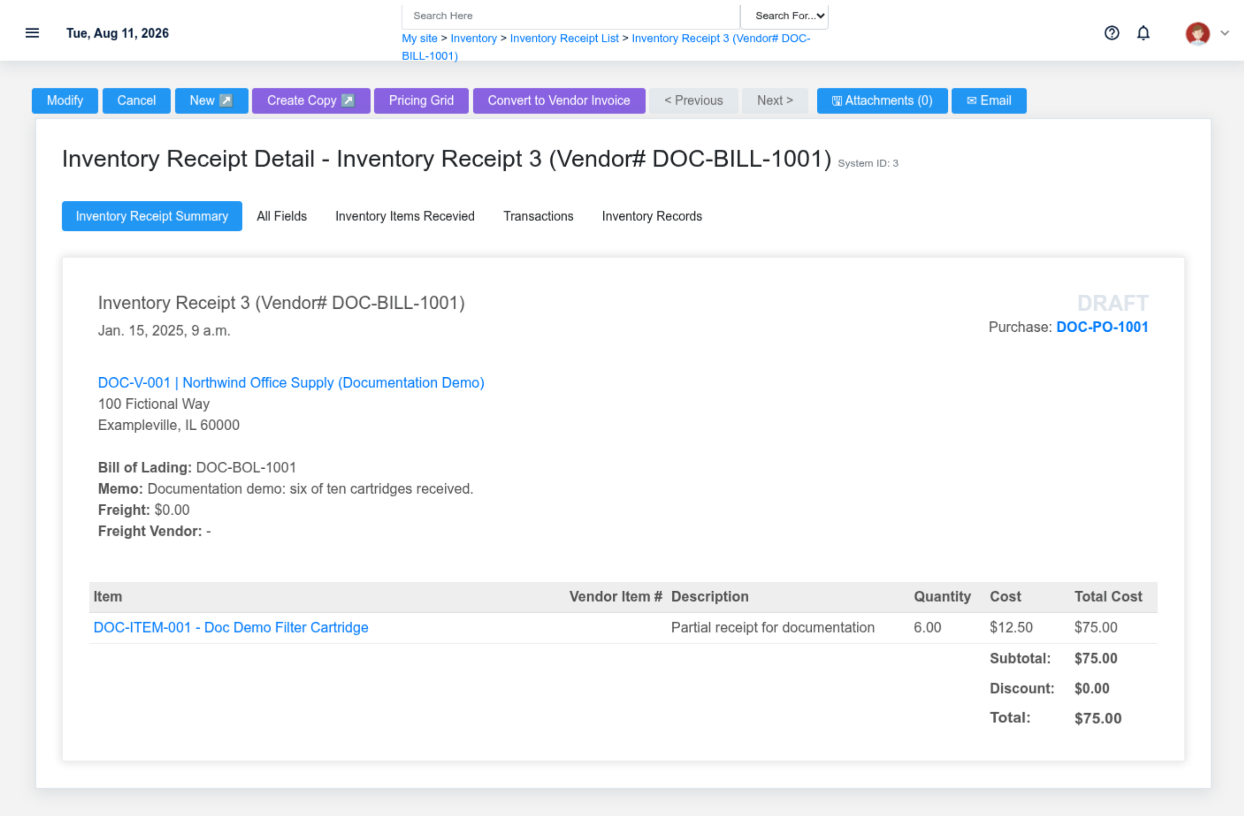
Delete an Inventory Receipt

Delete this Inventory Receipt only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Inventory Items Recevied**, **Inventory Records**, and **Transactions**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Status**, **Date Created**, and **Vendor Invoice #**. After confirmation, return to the Inventory Receipts list and make sure only the intended Inventory Receipt was removed.

Review Inventory Receipt details



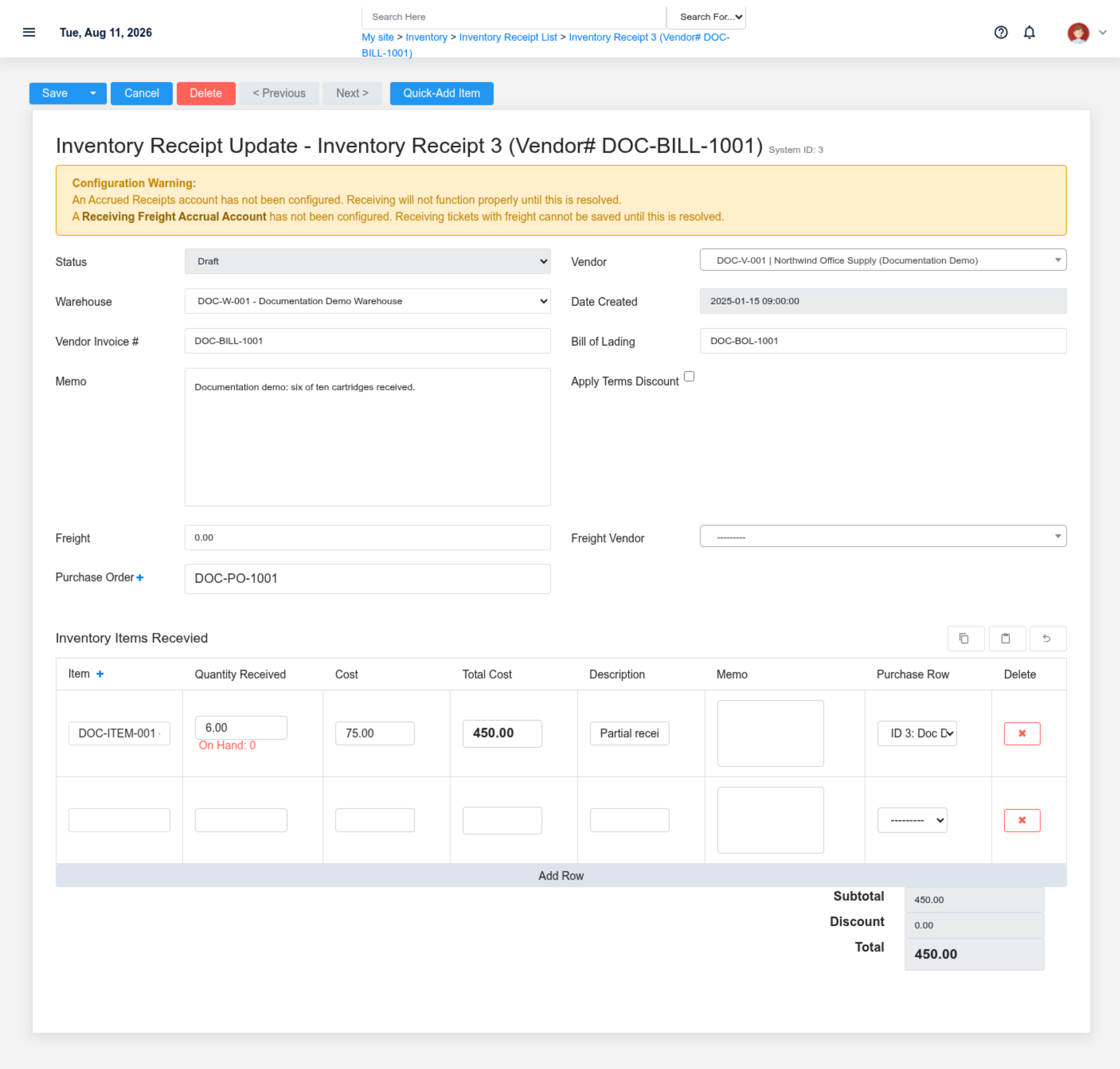
A receiving ticket linked to the fictional purchase order and vendor bill.

Use the detail page as the shared record of what this Inventory Receipt currently means. Verify **Status**, **Date Created**, **Edit Locked**, **Subtotal**, and **Total** before relying on it for a decision.

Follow **Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order** to determine whether the issue is on this Inventory Receipt or on one of those linked records.

Next check: Verify on-hand inventory and the purchase order’s remaining quantity, then use the receipt when matching the vendor invoice.

Edit an existing Inventory Receipt



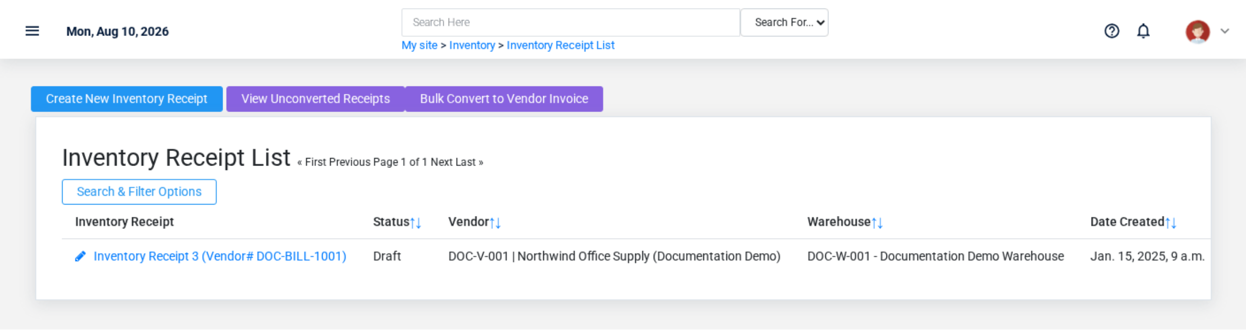
The Inventory Receipts update screen in the Brisk documentation demo.

Edit this Inventory Receipt to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order** with the supporting document or approved request.
2. Recheck **Status**, **Vendor**, **Warehouse**, **Date Created**, **Vendor Invoice #**, and **Edit Locked**, plus the remaining screen fields. These values are most likely to change warehouse availability, replenishment, quantities, and valuation.
3. Save the change, return to the list, and confirm that the Inventory Receipt now appears under the expected **Status**, and **Edit Locked**.

After the change: Verify on-hand inventory and the purchase order’s remaining quantity, then use the receipt when matching the vendor invoice.

Find and review inventory receipts



The Inventory Receipts list screen in the Brisk documentation demo.

Use the Inventory Receipts list to find the correct record before opening or changing it. Compare **Status**, **Date Created**, and **Vendor Invoice #**. Records with similar names or numbers can still belong to different **Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order**.

- Narrow the list with **Vendor** filters.
- The initial order emphasizes **Id**. Select a column heading when you need a different comparison.

Open the Inventory Receipt whose **Status**, **Date Created**, and **Vendor Invoice #** match the task. If it is missing, clear the list filters and recheck **Vendor**, **Status**, and **Edit Locked** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 16 user-relevant fields for this Inventory Receipt, including 4 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Status	No	Current status of this inventory receipt. Available values: Draft, Complete.
Vendor	No	The vendor associated with this inventory receipt.
Warehouse	No	The warehouse associated with this inventory receipt.
Date Created	No	Date and time recorded for date created on this inventory receipt.
Vendor Invoice #	No	The vendor invoice # recorded for this inventory receipt.
Bill Of Lading	No	The bill of lading recorded for this inventory receipt.

Field	Required	What it controls
Memo	No	The memo recorded for this inventory receipt.
Edit Locked	No	Whether the edit locked option applies to this inventory receipt.
Final Costs	No	Uncheck when receiving with estimated costs that will be finalized later.
Apply Terms Discount	No	When enabled, applies the vendor payment-terms discount percent to this receiving ticket.
Freight	No	The total freight cost for this receiving ticket. Freight is distributed into line-item inventory costs by weight and accrues to the receiving freight accrual account.
Freight Vendor	No	If different from the item vendor, conversion creates a separate freight vendor invoice. If the same vendor is selected, freight is added as a line on the item vendor invoice.
Subtotal	No	The gross total of all receiving ticket line items before discounts.
Discount	No	The total discount amount applied from vendor payment terms.
Total	No	The total dollar amount for this inventory receipt.
Purchase Order	No	Links this receiving ticket to a purchase order.

What happens next

Verify on-hand inventory and the purchase order’s remaining quantity, then use the receipt when matching the vendor invoice.

Common mistakes and troubleshooting

- **The record saved but is not available where expected:** Recheck **Status**, and **Edit Locked**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Vendor**, **Warehouse**, **Freight Vendor**, and **Purchase Order** from the detail page. Correct the specific relationship that

is wrong instead of forcing a total or status to compensate for it.

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