

CREATE A RECEIPT – PROCUREMENT EVENT

Receipts should **ONLY** be created for a) fully received orders **OR** b) partially received orders **ONLY IF** you do **NOT** plan to receive the remaining items (PO to be adjusted)

1. Click the Procurement application:



2. Under Tasks Click **Create Receipt**.

3. Choose **Purchase Order**.

4. In the Purchase Order box type the **Supplier Name** or choose the Supplier from the drop-down menu.

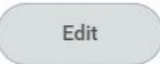
5. All your issued PO's from that Supplier will appear.

6. Choose the appropriate **PO**.

7. If you received **ALL ITEMS** on the PO, check **Fully Receive Box**.

8. Click **OK**.

9. Click the **Attachments Tab**.

10. Click the **Edit button**  to open the Attachments box.

11. Attach your receipt / invoice.

12. Click **Save**. 

13. Click the **Lines Tab**.

for Steps 9-13

14. Verify quantities Received of each Goods Line (items)

If order was checked “Fully Received” (on step 7)

a. **Verify** quantities received are correct (ie. 3/3, 5/5)

If order was NOT “Fully Received” (on step 7)

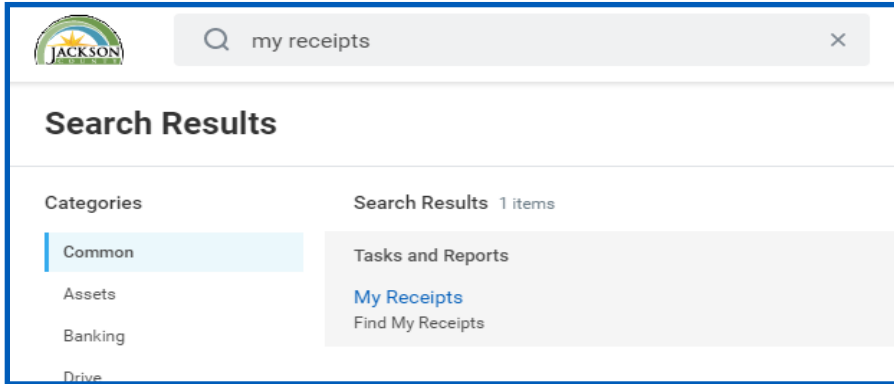
- a. **Enter** the “Quantity to Receive” for EACH GOODS LINE (or click the Fully Receive Box if you rec'd all)
- b. In **Memo** field, provide reason you are not receiving Goods Line in full (ie. Items were unavailable, Items on backorder so please remove from PO). Buyers will adjust the PO accordingly. Note: Memo is not required if you receive a Goods Line in full.
- c. **REPEAT STEPS a & b FOR EACH GOODS LINE**

2. Click **Submit**

3. The Receipt will be forwarded for any required approvals (ie. Receiving Specialist) before being placed on the docket.

CHECK THE STATUS OF YOUR RECEIPTS

1. To check the status of your receipts, type **my receipts** into the **search bar** and press **enter**.



2. Click on **My Receipts** under Tasks and Reports.
3. Click **OK**.
4. You can now view a status report of your receipts and access each one individually.

A screenshot of a table titled 'My Receipts'. The table has four columns: 'Receipt', 'Receipt Date', 'Receipt Status', and 'Purchase Orders'. It contains four rows of data.

Receipt	Receipt Date	Receipt Status	Purchase Orders
RCPT-000005 for PO-000001	06/14/2021	In Progress	PO-000001
RCPT-000034 for PO-000001	06/23/2021	Approved	PO-000001
RCPT-000036 for PO-000001	06/24/2021	Canceled	PO-000001
RCPT-000037 for PO-000001	06/24/2021	Denied	PO-000001