Purchasing Activities

Processing a Receipt Using Receive Items

Overview:

Understanding the Processing Receipts in Receive Items Process

This tutorial explains the process to create a receipt in eProcurement.

This process can be done through two pages:

- Manage Requisitions page
- Receive Items page

The Receive Items page will be used in this procedure, but the same process may also be completed using the Manage Requisitions page. For more information on how to use the Manage Requisitions page, see the "Processing Receipts Using Manage Requisitions" tutorial.

Requesters can only receive for their own Requisitions. Those with a Power Receiver role may receive items for other Requesters in either the e-Procurement or Purchasing module. Requisitions must also be in PO Dispatched Status for receipts to be processed.

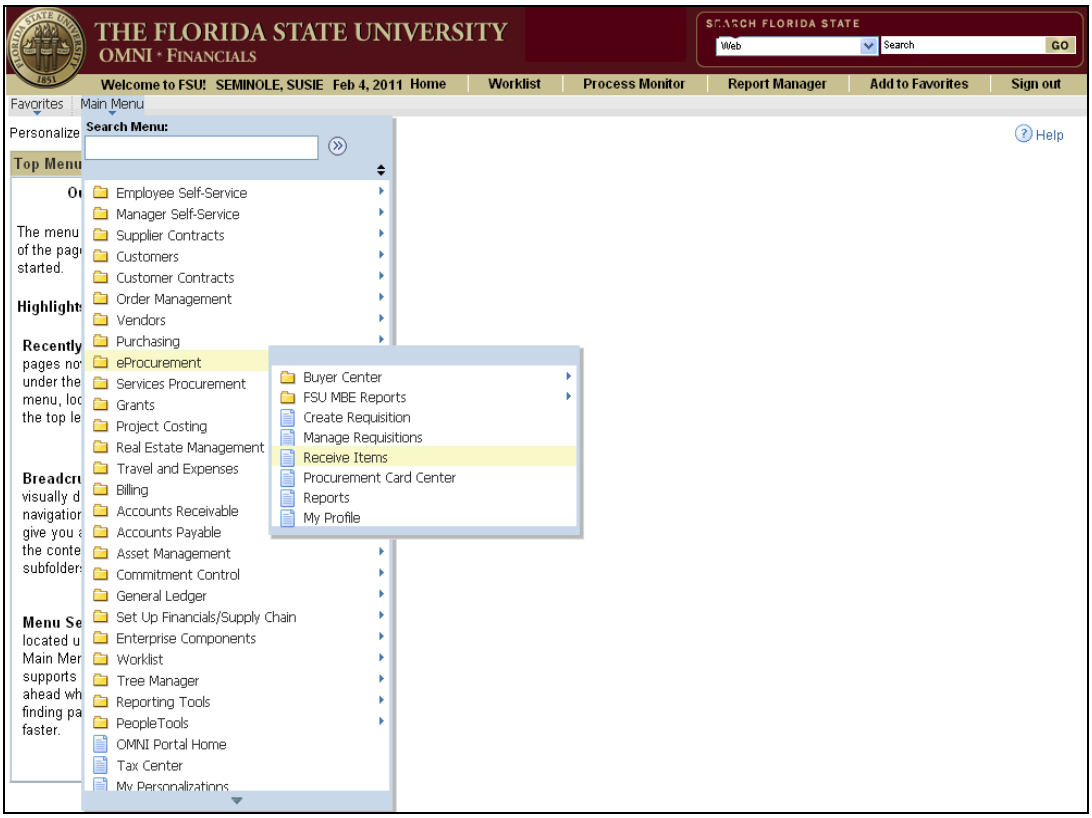
Items must be received before payment can be issued to a vendor. To ensure that your vendor is paid in a timely manner, please receive items as they come in.

Procedure

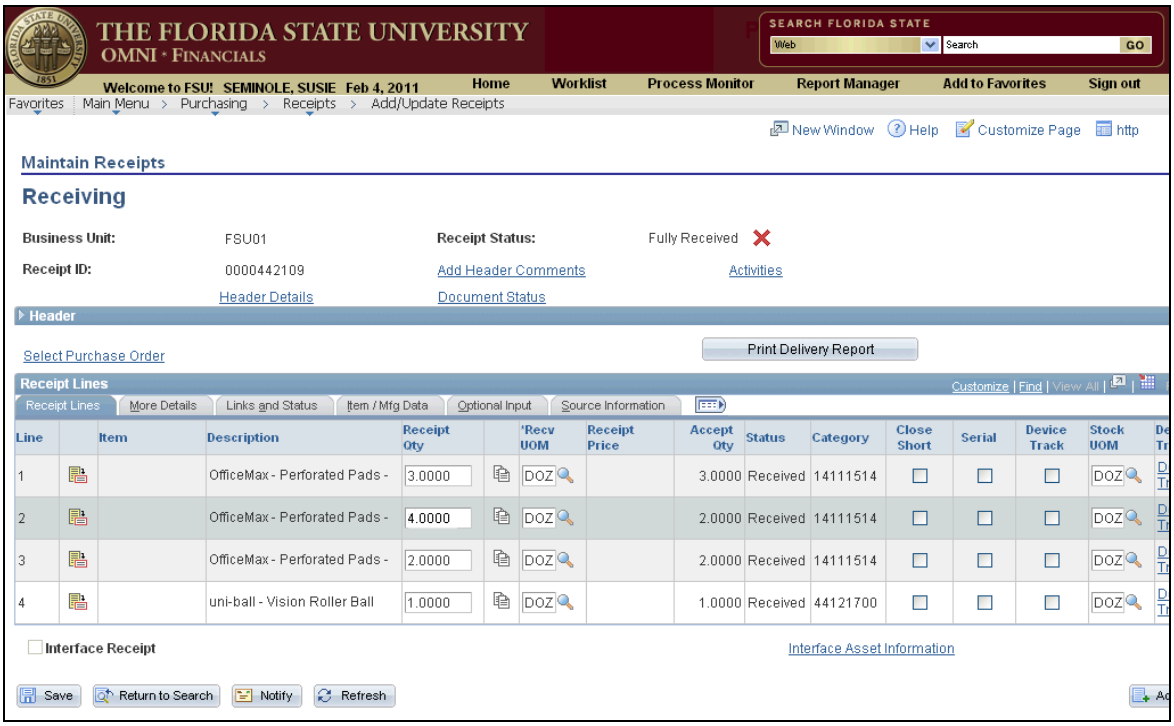
Scenario:
In this topic, you will learn how to process a receipt using the Receive Items link.

Key Information:
Requisition to receive
Quantity to receive

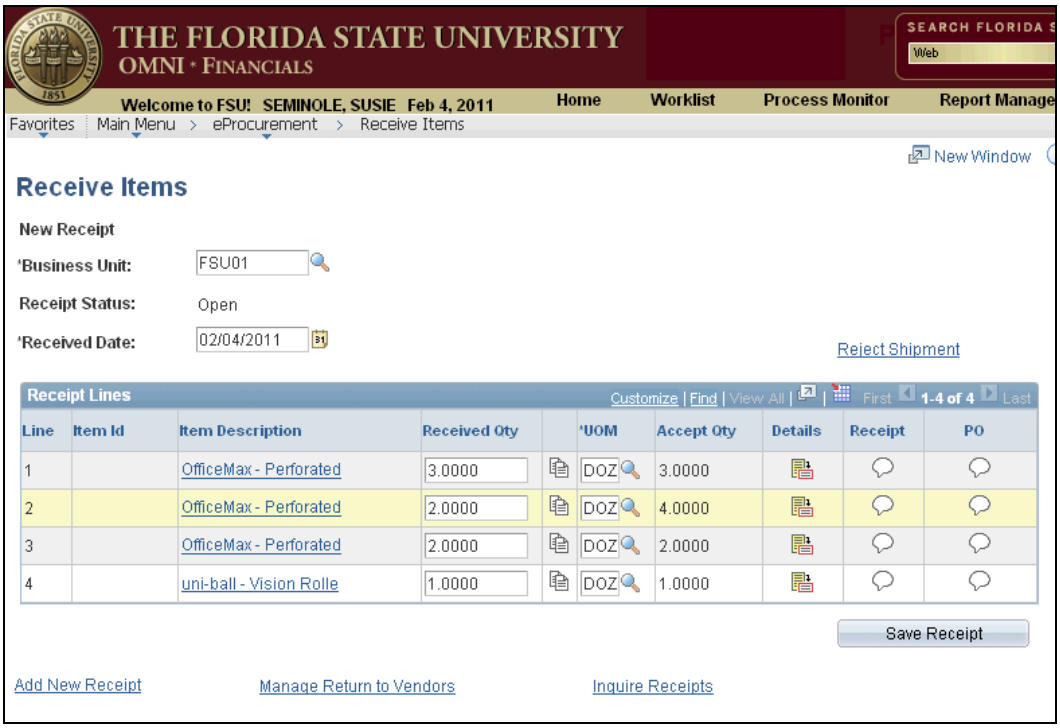
Step	Action
1.	Click the **Financials 9.1** button. Financials 9.1
2.	Click on the **Main Menu** button. Main Menu



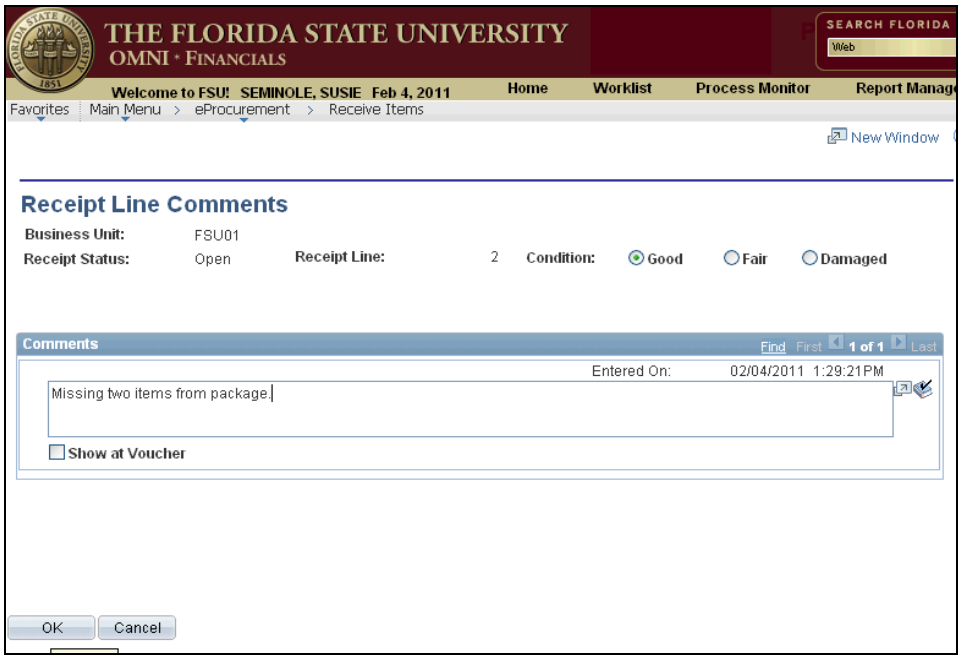
Step	Action
3.	Click the **eProcurement** menu followed by the **Receive Items** menu.
4.	Find the items that you physically received in your department and select the checkboxes for each line item you want to include on the receipt. Click the **Checkbox** for the item(s) to receive. ☐
5.	Click the **Receive Selected** button to submit these items to the receipt.



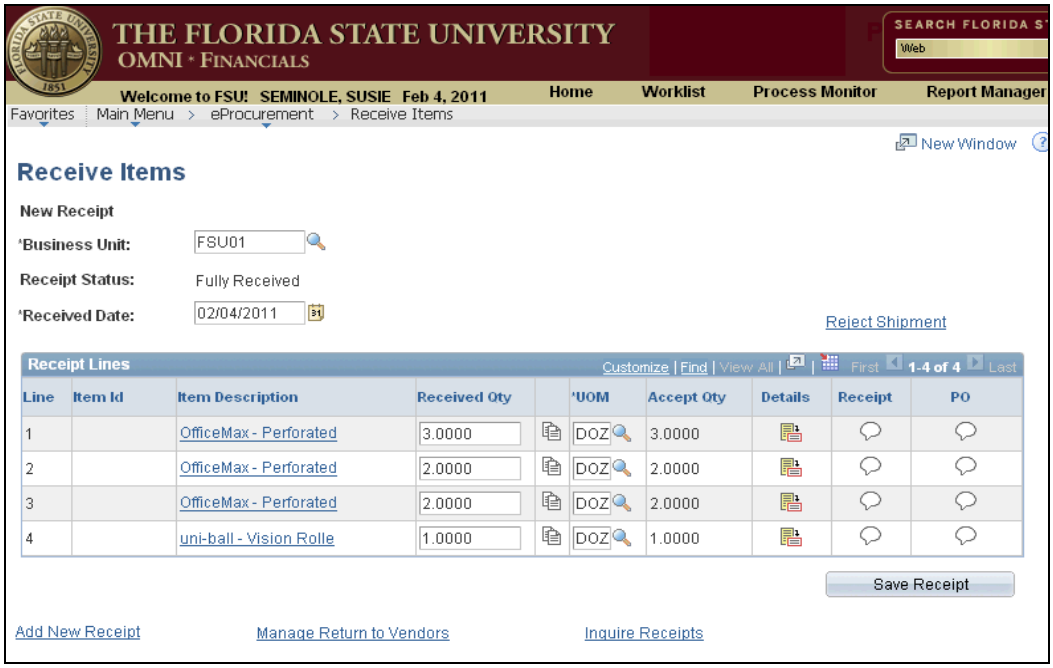
Step	Action
6.	Adjust the **Received Qty** to reflect the actual quantity of items received. Always enter the quantity which was actually received, not what was ordered.



Step	Action
7.	Click the **Comments** button for line 2 to enter an explanation of why this quantity was changed.
8.	Enter information to explain why the received quantity of this line item was changed into the **Comments** field.



Step	Action
9.	Click the **OK** button.



Step	Action
10.	Once all line items have been updated, click the **Save Receipt** button. Save Receipt
11.	This warning appears as a result of the change that was made to the **Received Qty** on the previous page. Click the **OK** button. OK

Step	Action
12.	The receipt has now been saved and assigned a number. Click the **Return to Receiving** button. Return to Receiving
13.	All lines which were received in full do not appear on this page now.

Step	Action
14.	Click the **Home** link to return to the main menu.
15.	**Congratulations!** You have completed this topic. **End of Procedure.**