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Locate Purchase Order (PO) and Open

1. Click in the box located in header and enter last 5 digits of Purchase Order (PO) Number then hit enter. Choose from list.

2. All documents related to the PO will be listed. Click on the Purchase Order to open.

Create Receipt

1. Create receipt after item(s) are physically received or services are performed. The receipt is the department’s approval for the invoice to be paid.

2. Click on the at the top right of the screen. Choose Create Quantity Receipt. The Quantity Receipt page opens.
3. **Receipt Date** - Enter the ACTUAL date you physically received item(s) or ACTUAL date services were completed. DO NOT ENTER today's date unless that is the actual date.

4. **Packing Slip No.** - Enter packing slip number. If there is no packing slip number enter none.

5. **DELIVERY** - Enter delivery information. This is optional, i.e., enter the Tracking No. or attach your scanned packing slip by clicking **Add**.

6. If your PO has more than 1 line and not all lines were received yet, click on the box to the right to add a check mark in the box ☑️ ☑️ ✔️ then click on the ☑️ to remove each line not received or use the ☑️ on the line not received.
Receive Orders

7. **Quantity** - Enter number received for the remaining lines, then click Complete on the top right of the screen.

![Image of quantity entry]

8. A receipt number will be assigned. File packing slip (if you did not attach scanned copy to receipt).

![Receipt Created]

**Correct/Delete Receipt**

1. Correct a previously entered receipt for an invoice not processed yet.

2. Follow Locate Purchase Order (PO and Open).

3. Click Receipts tab.

4. Click on blue Receipt number under No. column to open receipt to be corrected.

![Records found: 1]

5. Click Reopen Receipt on the top right side of the screen.

6. A window will appear. Enter reason for reopening the receipt (i.e., correct qty) then click Reopen Receipt.
7. **Correct Receipt** – Change any fields that are incorrect, and then click **Complete**.

8. **Delete Receipt** - Click on the drop-down arrow next to **Complete** then select **Delete**.

9. One of the screens below will appear depending on which option you chose above.