Purchasing

How to create and post receipts

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Receiving
From purchases orders to receipts

Look for the Action Items panel, and then select Recently Completed listed under Purchase Orders.

Completing receipts for products is only required for purchases totaling $1000 or more.

CLICK ON Click on your name and then select “My Recently Completed Purchase Orders”
This action opens the history tab showing your list of purchase orders.
Receiving
From purchase orders to quantity receipts

After completing Step 1, the history tab in the primary menu is opened and you are taken to PO History, which displays a list of your purchase orders.

To create a quantity receipt, CLICK ON the check box aligned with the PO number needing a receipt.

From the drop down menu SELECT Create Quantity Receipt, and then SELECT GO.
Receiving
Creating a receipt for received orders

Notice the activated tab in the primary menu has changed from history to settlement.

4. ENTER the quantity received. If you received a partial order, you will need to enter a second receipt when items are physically received.

5. SELECT Received from the menu options.

6. ALWAYS SELECT COMPLETE to finish the process.
Final Receipt
Confirming the receipt process is complete

After selecting Complete in Step 6, you should see a screen similar to this one, which displays your new receipt number.