

## Procurement: Create a Receipt

*For employees who create receipts*

**Purpose:** To create a Receipt.

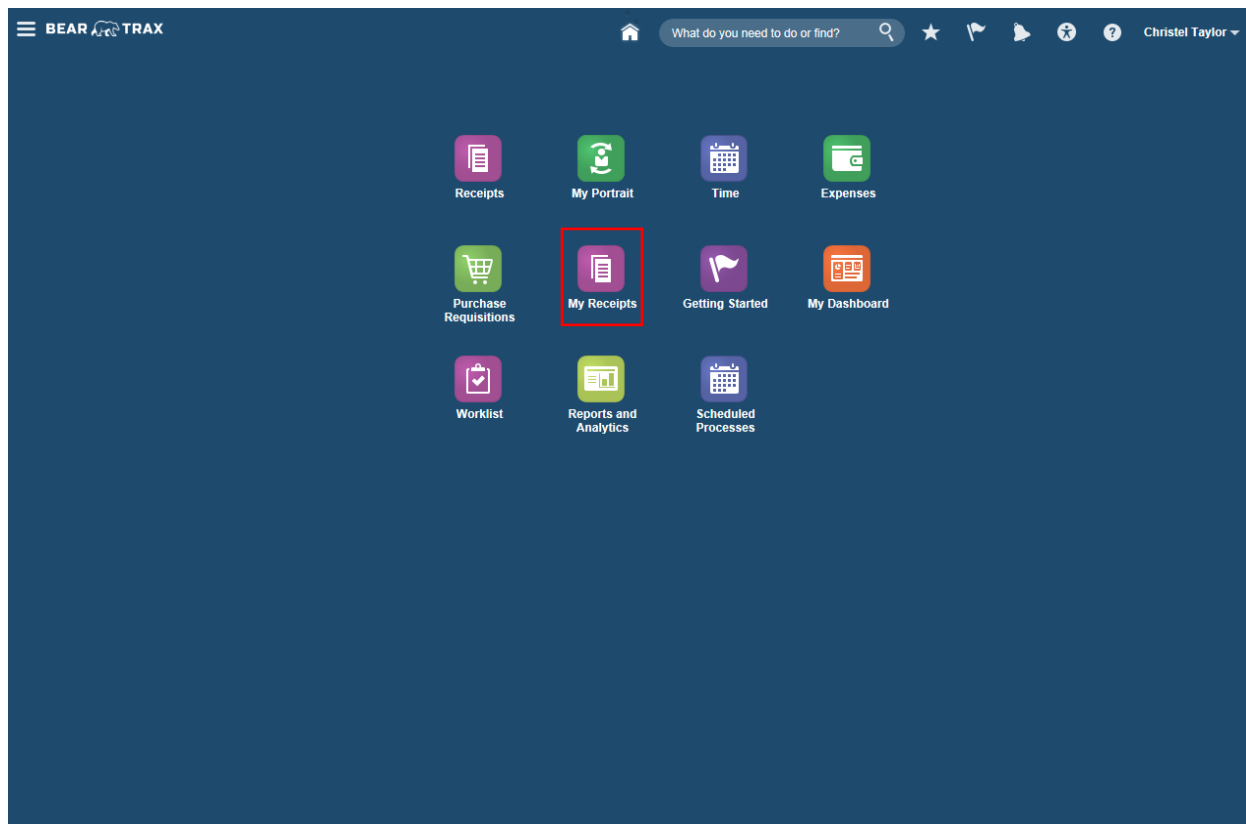
**How to Access:** Log into the [Bear Trax](#) application. Select the task in the Navigator.

**Helpful Hints:** Be sure to keep in mind that...

- Receipts must be created for all purchase orders (including Expense Card and Procurement Card)
- This helps with the elimination of paper P-card packets
- Only ITS will receive Apple and Lenovo orders
- All fields marked by an asterisk, \*, are required.

**Procedure:** Complete the following steps to create a receipt:

1. Click on the **My Receipts** icon.



**Note:** It is useful to have the requisition number when searching.

2. Click **Advanced Search** and select **Last 60 Days** in the **Items Due** field. Click **Search** to display all submitted requisitions from the last 60 days.

## Receive Items

### Advanced Search

Basic Saved Search Items Due in Last 7 Days ▼

\*\* At least one is required

\*\* Requester Finch, Dawn ▼

\*\* Entered By ▼

Requisition

Items Due Last 60 days ▼

Requisitioning BU ▼

\*\* Purchase Order ▼

Supplier ▼

Shipment ▼

☐ Exclude POs with two-way match approval level

**Search** Reset Save... Add Fields ▼ Reorder

3. Highlight the requisitions to be received. Users can receive more than one requisition at a time.

## Search Results

View ▾ **Receive**

Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered			Purchase Order	Shipment
						Quantity	UOM	Currency		
Shawnee State ...	REQ100696	1	Pilot(R) G-2(R) Retractable Gel...	GBEX LLC	5/17/17	4	DZ		PO200247	
Shawnee State ...	<b>REQ100716</b>	1	multiple line items	Gordan Flesch C...	5/19/17	1	EA		PO200251	
Shawnee State ...	REQ100716	2	multiple line items	Gordan Flesch C...	5/19/17	1	EA		PO200251	

4. Click on **Receive**.

## Search Results

View ▾ **Receive**

Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered			Purchase Order	Shipment
						Quantity	UOM	Currency		
Shawnee State ...	REQ100696	1	Pilot(R) G-2(R) Retractable Gel...	GBEX LLC	5/17/17	4	DZ		PO200247	
Shawnee State ...	REQ100716	1	multiple line items	Gordan Flesch C...	5/19/17	1	EA		PO200251	
Shawnee State ...	REQ100716	2	multiple line items	Gordan Flesch C...	5/19/17	1	EA		PO200251	

5. Click **Show Receipt Quantity** to automatically populate the fields.

## Create Receipts

Actions ▾ View ▾ **Show Receipt Quantity** Remove Line

Submit Cancel

Requisition	Item Description	Receipt			* Transaction Date	Waybill	Packing Slip	Requisitioning BU	Purchase Order
		* Quantity	UOM	Currency					
REQ100716	multiple line items		EA		5/24/17 7:10			Shawnee State ...	PO200251

6. Update **Quantity** and **Date** as necessary, then click **Submit**.


Create Receipts **Submit** Cancel

Actions ▾ View ▾ Remove Line Show Receipt Quantity

Requisition	Item Description	* Quantity	UOM	Currency	* Transaction Date	Waybill	Packing Slip	Requisitioning BU	Purchase Order
REQ100716	multiple line items	1	EA		5/24/17 7:10			Shawnee State ...	PO200251

**Note:** The other fields are not required.

7. A confirmation window will appear. Click **Ok**.



**Confirmation**

You created the following receipt numbers: 400119.

**OK**

8. The requisition line will no longer appear in the search because it has been received.

## Final Notes

By following these steps, you have successfully created a receipt to include with a purchase order.