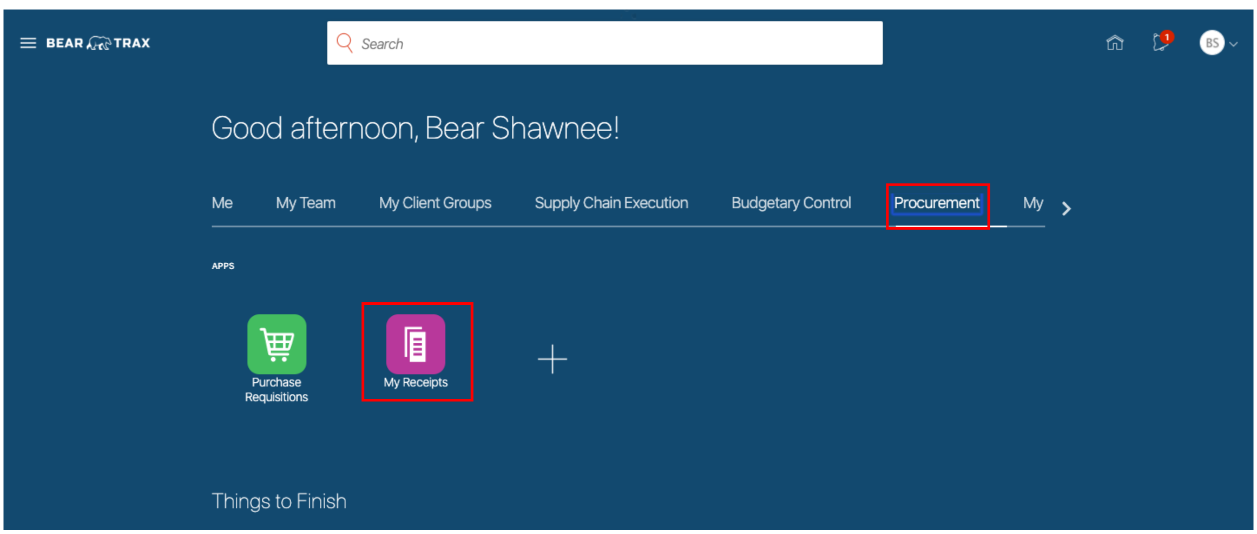
Procurement: Create a Receipt

For employees who create receipts

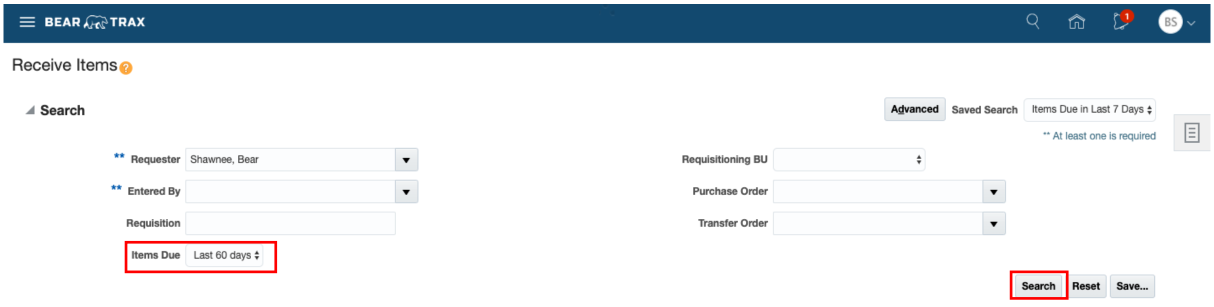
Purpose:	To create a Receipt.
How to Access:	Log into the Bear Trax application. Select the task in the Navigator.
Helpful Hints:	Be sure to keep in mind that… • Receipts must be created for all purchase orders (including Expense Card and Procurement Card) • This helps with the elimination of paper P-card 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.

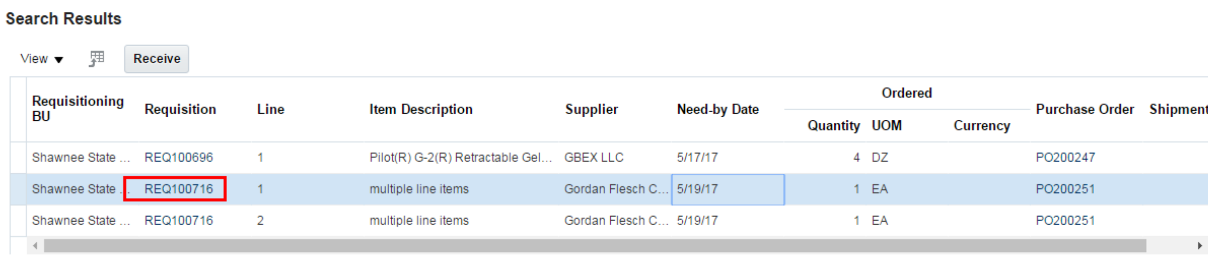


Note: It is useful to have the requisition number when searching.

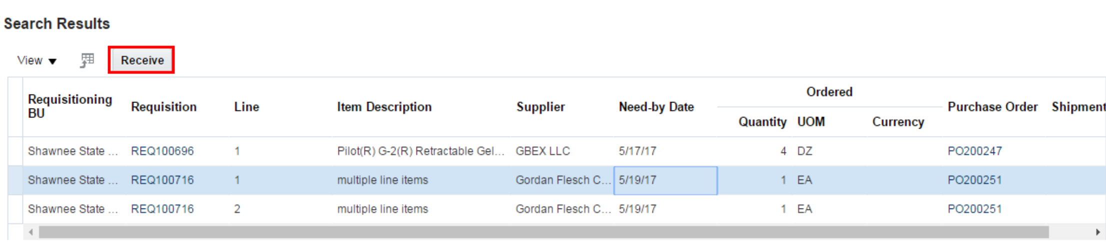
2. Click **Advanced Search** and select **Last 60 Days** in the **Items Due** field. **Click Search** to display all submitted requisitions from the last 60 days.



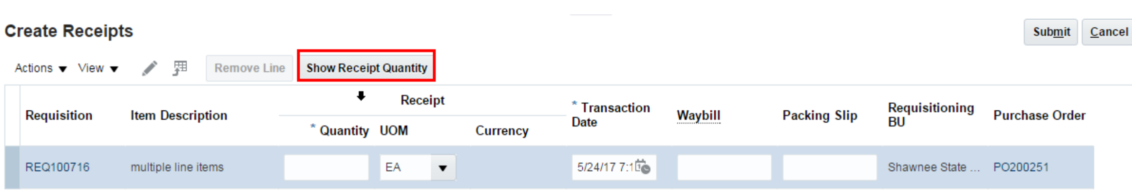
3. Highlight the requisitions to be received**.** Users can receive more than one requisition at a time.



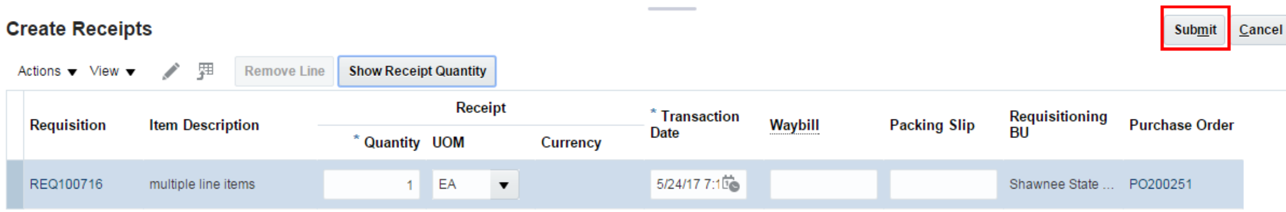
4. Click on **Receive.**



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

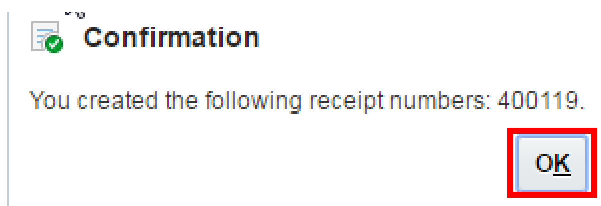


6. Update Quantity and **Date** as necessary, then click **Submit.**



Note: The other fields are not required.

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