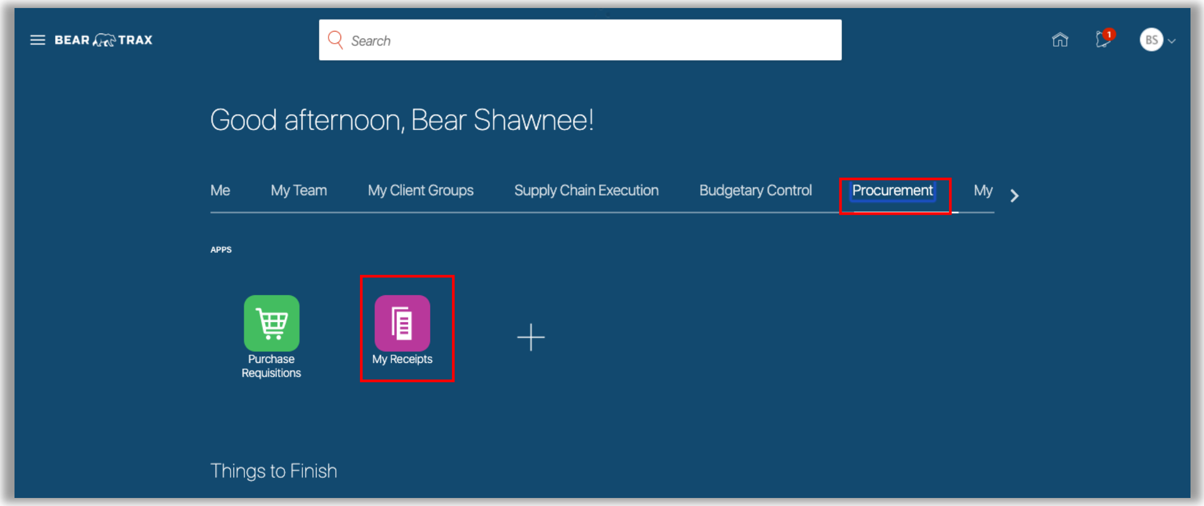
Procurement: Return Receipt

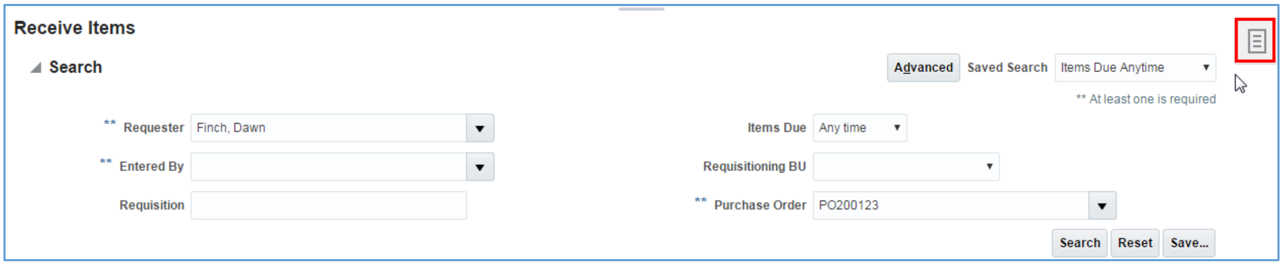
For employees that manage returns

Purpose:	To create a return 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… • You can make notes on why you are returning your item in the receipt • Contact Procurement Services at procurement@shawnee.edu anytime you are returning a receipt
Procedure:	Complete the following steps to create a return receipt:

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


BEAR TRAX
Search
BS
Good afternoon, Bear Shawnee!
Me
My Team
My Client Groups
Supply Chain Execution
Budgetary Control
Procurement
My
APPS
Purchase Requisitions
My Receipts
Things to Finish

2. Click the icon on the right to open the menu and display more options.


Receive Items
Search
Advanced
** At least one is required
Search
Reset
Save...

Saved Search: Items Due Anytime

** Requester: Finch, Dawn

** Entered By:

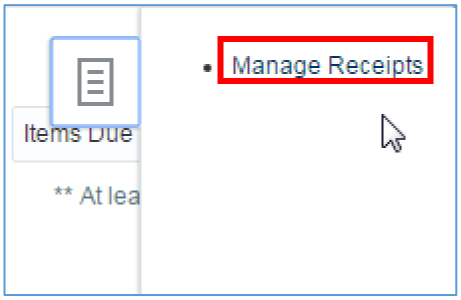
Requisition:

Items Due: Any time

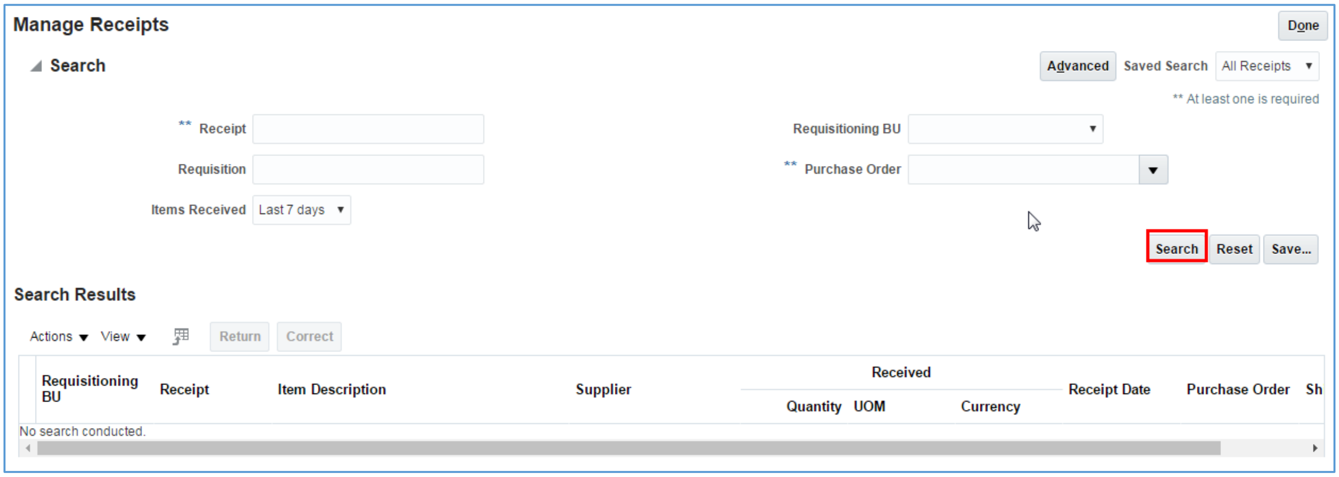
Requisitioning BU:

** Purchase Order: PO200123

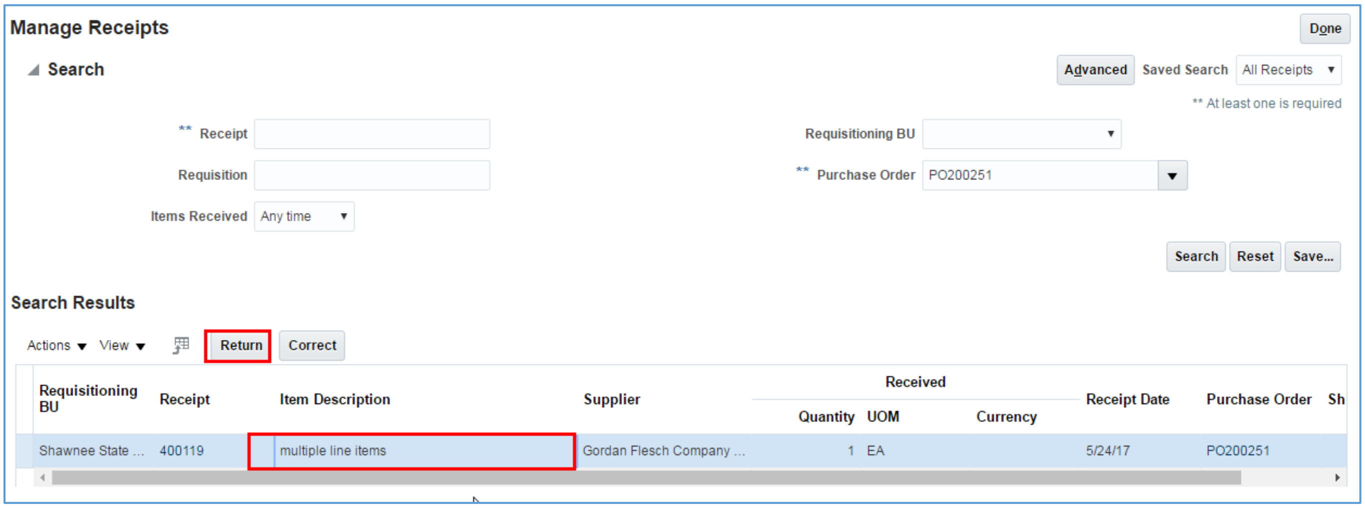
3. Click **Manage Receipts** to go to the next page and view all past-received receipts.


Manage Receipts
Items Due
** At lea

4. Search for the receipt you want to return. Enter the Purchase Order number the item was received on or the Receipt or Requisition number to search for the specific receipt. Change the **Items Received** field to “Any Time”. Click **Search**.


Manage Receipts
Done
Search
Advanced
Saved Search
All Receipts
** At least one is required
** Receipt
Requisition
Items Received
Last 7 days
Requisitioning BU
** Purchase Order
Search
Reset
Save...
Search Results
Actions
View
Return
Correct
Requisitioning BU
Receipt
Item Description
Supplier
Received
Quantity
UOM
Currency
Receipt Date
Purchase Order
Sh
No search conducted.

5. Highlight the receipt line to return and click **Return.**


Manage Receipts

Search

** At least one is required

** Receipt:

Requisition:

Items Received: Any time

Requisitioning BU:

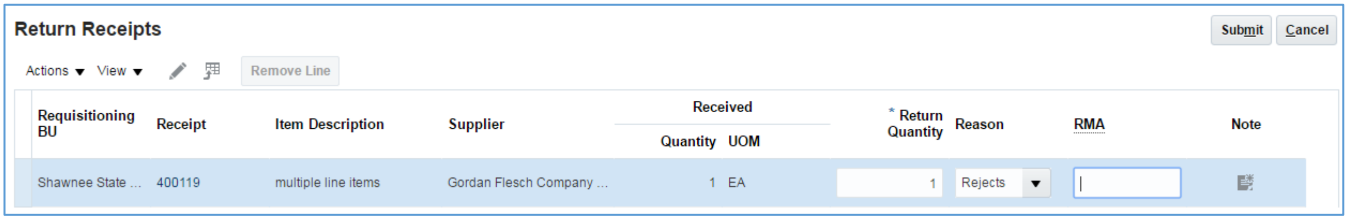
** Purchase Order: PO200251

Search Results

Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	Received UOM	Received Currency	Receipt Date	Purchase Order	Sh
Shawnee State ...	400119	multiple line items	Gordan Flesch Company ...	1	EA		5/24/17	PO200251	

Done
Advanced
Saved Search
All Receipts
Search
Reset
Save...
Actions
View
Return
Correct

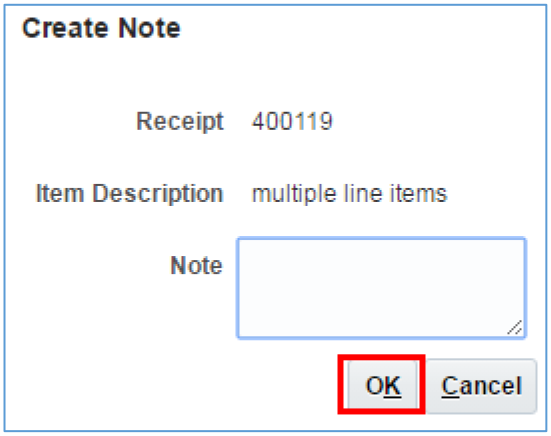
6. Fill out the **Return Quantity, Reason** and **RMA** field.


Return Receipts

Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	Received UOM	* Return Quantity	Reason	RMA	Note
Shawnee State ...	400119	multiple line items	Gordan Flesch Company ...	1	EA	1	Rejects		

Submit
Cancel
Actions
View
Remove Line

7. Add any notes in the **Note** field and click **OK.**

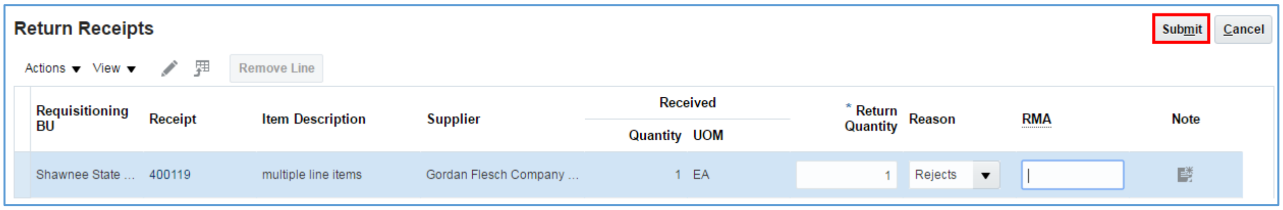

Create Note

Receipt: 400119

Item Description: multiple line items

Note:

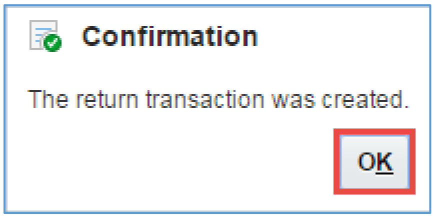
8. Click **Submit** to complete the return receipt.


Submit
Cancel
Actions
View
Remove Line

Return Receipts

Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	Received UOM	* Return Quantity	Reason	RMA	Note
Shawnee State ...	400119	multiple line items	Gordan Flesch Company ...	1	EA	1	Rejects		

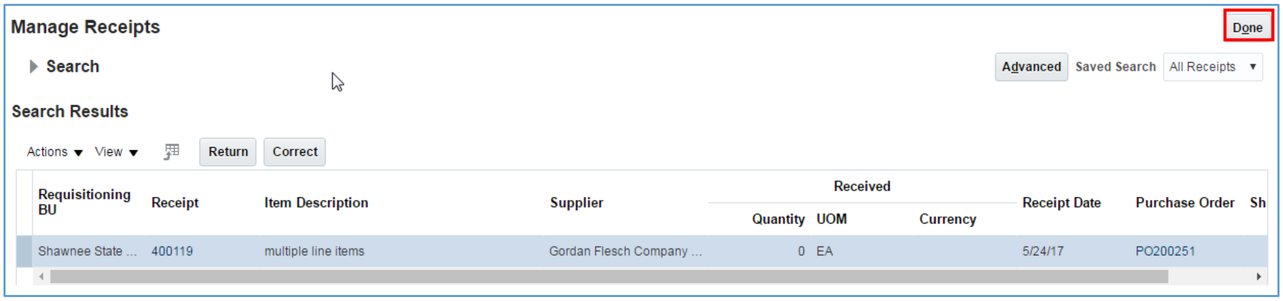
9. A confirmation message will appear. Click **OK.**



Confirmation

The return transaction was created.

10. The Manage Receipts window will appear. Click **Done.**

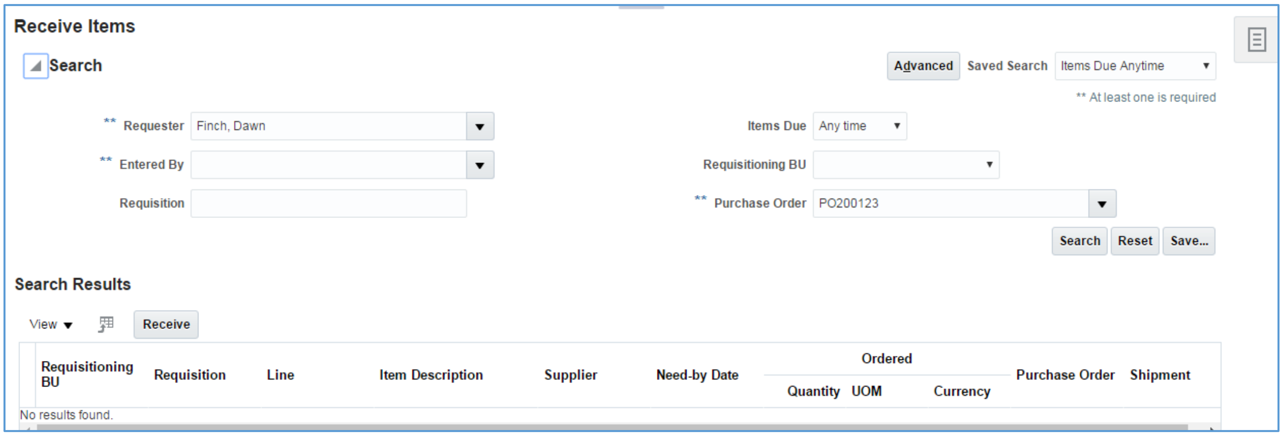

Done
Search
Advanced
Saved Search
All Receipts
Actions
View
Return
Correct

Manage Receipts

Search Results

Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	Received UOM	Received Currency	Receipt Date	Purchase Order	Sh
Shawnee State ...	400119	multiple line items	Gordan Flesch Company ...	0	EA		5/24/17	PO200251	

The **Receive Items** page will appear.


Search
Advanced
Saved Search
Items Due Anytime
Search
Reset
Save...
View
Receive

Receive Items

** At least one is required

** Requester: Finch, Dawn
** Entered By:
Requisition:
Items Due: Any time
Requisitioning BU:
** Purchase Order: PO200123

Search Results

Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered Quantity	Ordered UOM	Ordered Currency	Purchase Order	Shipment

No results found.

Final Notes

By following these steps, you have successfully created and submitted a return receipt.