Creating a Quantity Receipt

Quantity receipts are created against all standard goods purchases. This includes punch-out and hosted catalogs and non-catalog orders that are not set up as standing orders. (Exception: PCard orders DO NOT need to be received in eMarketplace.)

1. Pull up the purchase order that you want to post receiving against and click the ‘Purchase Order’ tab.

2. Locate the PO Clauses in the ‘General Information’ section. If there is no Standing Order Clause on the purchase order, you must Create a Quantity Receipt. (If there is a Standing Order Clause, follow the Create a Cost Receipt instructions.)
Note: IF THERE ARE SEVERAL CLAUSES ATTACHED TO THE PURCHASE ORDER, YOU MAY HAVE TO CLICK ‘VIEW ALL CLAUSES’ TO SEE THE COMPLETE LIST OF CLAUSES.

If there is a Standing Order Clause, use the ‘Creating a Cost Receipt’ instructions. If there is no Standing clause, continue with these instructions for Creating a Quantity Receipt.

3. From the drop down menu on the right hand side of the screen, choose the “Create Quantity Receipt” menu option and then click the “Go” button.

4. In the Header Information section, type the packing slip number in the “Packing Slip No.” box. Packing slip is required, so you must enter something. (If you don’t have a Packing Slip No., simply enter your initials.) You will see the line items from your order below in the Receipt Summary section. The receipt is automatically populated with the PO information, including the remaining number of items to be received.
NOTE: The receipt name will default to today’s date and your username and a sequence number. You can change this to something more appropriate, if you wish. Carrier, Tracking No., RMA, Attachments and Notes are all optional. For optimal record keeping, you may choose to attach a copy of the invoice or packing list to the receiving document for later retrieval and/or auditing purposes.

5. If you are not going to receive all items on your purchase order, you must remove the unwanted items from the receipt. Select the items you DO NOT want to receive against by checking the select box. Choose the Remove Selected Items from the “For Selected Lines” drop box. Click Go.

This leaves the receipt you are preparing with only the items you wish to receive against. Keep the default action as Received, which indicates the item is to be received and type in the quantity received for that item. If you have an internal note you’d like to add to this receipt, click the Show Receipt Details option.
NOTE: YOU CANNOT RECEIVE MORE THAN THE REMAINING AMOUNT ON THE ORDER. You must do a change order asking for an increase in quantity. If the order is complete and quantity remains, you must request a change order to cancel the remaining items. Failure to do so will result in the continued encumbrance of the remaining funds.

6. Enter any notes you’d like for this order and click Save.

Click here to Show Receipt Details...

Enter notes here...
7. Click either one of the **Complete** buttons at the top or bottom of the screen.

The Receipt Number displays on the screen.

8. Clicking on the receipt number shows what was received.
9. And the next time you access the receiving for this purchase order, only the remaining quantities will appear.