# UR Procurement – Create Receipts

| **Instructions** | **Details and Screenshots** |
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| Home page:* Use the UR logo to return to this Home screen
* Use the Search field with keywords
* Use the Inbox for Workday messages
* Use the Procurement worklet for frequently used tasks and reports
	+ Create Requisitions
	+ Create Receipts
	+ Find Requisitions
 | C:\Users\skraynik\AppData\Local\Temp\SNAGHTML196b07be.PNG |
| Rules | * The create receipt action is required for **Goods-based orders over $2500.00**. The supplier invoice will not be paid until a receipt is created.
* The create receipt action is required for **all services-based orders, all grant (FAO=GR), and all capital**, no matter the dollar value. The supplier invoice will not be paid until a receipt is created.
* The create receipt action is required when supplier invoice is Submitted and the Match Exception when Missing Receipts or there are not enough Receipts exceptions occur.
* The create receipt action is required when supplier invoice is Submitted and the Match Exception that Invoice Total Amount is greater than the Receipt.
* Once a receipt is approved, the receipt cannot be edited or corrected but can be cancelled. If a receipt needs to be corrected, the Requisitioner should contact the P2P Service Center to cancel the receipt. Then the Requisitioner can create a new receipt.
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| From the Procurement dashboardif you have Workday Roles assigned*Requisitioner* * Under Tasks, select <**Create Receipt**> and then search for order that is ready to be received
	+ Can use the My Open Requisitions report to review a list of orders and create a receipt from the purchase order.
	+ Can use the My Purchase Order and create a receipt from the purchase order (related action)

*Requestors that do not have Workday Roles Assigned** Click **InBox** to review POs that are ready to receive.
* Record the PO number to create a receipt in the step below.
* Enter <**Create Receipt>** in the Global Search Field and press Enter.
* The screens below will appear. Continue with the instructions below.
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| Requisitioners Select <**Create Receipt**> under Actions to search by purchase order or supplier contract* Select the Purchase Order radio button and search for order either by typing the PO number or using the prompts
* If searching by supplier name, if there is nothing to receive for a given supplier, it will show No Items
* Use the Fully Receive checkbox if the order was fully received. This can be changed on the next screen if desired.
* Select <**OK**>
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| * Review the Summary area of the Create Receipt screen
* Scroll down to the line level details
 |  |
| * Review the line level details. Enter the Quantity to Receive if necessary.
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| * Receipts do not require attachments, but you can attach packing slips if you wish to keep all of your documentation together.
* Select the Attachments tab and drag and drop (or choose the Select Files button) in order to add an attachment
 |  |
| When ready, select <Submit> button |  |
| Once the receipt is submitted, the details can be viewed. Take note the receipt is approved.Once a receipt is approved, the receipt cannot be edited or corrected but it can be cancelled. If a receipt needs to be corrected (or undone), the requisitioner should cancel the receipt and create a new one. |  |
| Match Exception for Missing Receipts or Not Enough Receipts* Requesters will receive an inbox task for match exceptions for missing or not enough receipts.
* For goods or services that have been physically received or performed, navigate to the purchase order from the inbox task in order to create a receipt.
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