# 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 the following types of orders. The supplier invoice will not be paid until a receipt is created.   + All goods (catalog) >=$2,500   + All goods (non-catalog) >$0   + All Grant purchases (GRXXXXX) >$0   + Spend Category = Trackable >$0   + All Service lines >$0 * The *create receipt* action is required when a supplier invoice is submitted and the following Match Exceptions are triggered:   + There are *no receipts* or *not enough receipts* per the above rules.   + When the Invoice total is greater than the Receipt total (service order). **Note**: a Change Order to add additional money will also be needed if the invoice is correct.   + When the quantity invoiced is greater than the quantity received. **Note**: a Change Order to increase the quantity will also be needed if the invoice is correct. * Once a *receipt* is submitted, 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. |
| 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. |  |
| 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**> |  |
| * 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. |  |
| * 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. |  |