

## Desktop Receiving

Receiving is a formal method for documenting acceptance of goods from vendors. After a purchase order (PO) has been dispatched and the items delivered, the items must be received by Central Receiving or by the department. The receiving process involves recording the items received and comparing it to what was originally ordered on the PO.

**Note:** A user can only receive items on requisitions they created. If the user did not create the requisition, an error message will appear and UTShare will not allow the user to receive the items. If the user who created the items is not available to receive the items, contact Property Management.

**To create a receipt for a PO items, follow the steps below:**

- 1) Navigate to the Manage Requisitions page: Navigator > Financials > eProcurement > Manage Requisitions. Alternatively, select the Procurement Operations homepage and click on the Manage Requisitions tile.
- 2) Using the Search criteria at the top of the page, find the requisition or PO for the item(s) to be received.

### Manage Requisitions

Requisition Search Keyword Search

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit <input type="text" value="UTARL"/>	Requisition Name <input type="text"/>	Request State <input type="text" value="PO(s) Dispatched"/>	Budget Status <input type="text"/>
Requisition ID <input type="text" value="0000020894"/>	Date From <input type="text" value="04/01/2019"/>	Date To <input type="text" value="06/19/2019"/>	Entered By <input type="text"/>
Requester <input type="text" value="6001132971"/>	PO ID <input type="text"/>		

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000020894	S. Davis_Power Supply	UTARL	04/23/2019	PO(s) Dispatched	Valid	5,483.00 USD	<input type="button" value="Select Action"/> <input type="button" value="Go"/>

- 3) Using the “Select Action” drop-down, select “Receive” then click the “Go” button.

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000020894	S. Davis_Power Supply	UTARL	04/23/2019	PO(s) Dispatched	Valid	5,483.00 USD	<input type="button" value="Receive"/> <input type="button" value="Go"/>

- 4) This will populate the Receive Items page. Select, using the check-box on the left, the items to be received. Click the “Receive Selected” button.

**Receive Items**

You have 2 lines open for receiving for requisition S. Davis\_Power Supply

**Receive Selected** and go to the Receive Form.

**Requisition Lines to Receive** Personalize | Find | View All | First 1-2 of 2 Last

Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
<input checked="" type="checkbox"/>	UTARL	S. Davis_Power Supply	OPS-A1000 450-1000 W DC Arc Lamp Power Supply	1	0	EA	CENT110		Sara Barton	NEWPORT CO-001	
<input type="checkbox"/>	UTARL	S. Davis_Power Supply	Discount	1	0	EA	CENT110		Sara Barton	NEWPORT CO-001	

[Inquire Receipts](#)

- 5) On the New Receipt page, if necessary, update the Received Quantity to match the quantity physically received. Click the “Save Receipt” button to save the receipt.

**Receive Items**

New Receipt

\*Business Unit

Receipt Status

\*Received Date

Header Comments/Attachments    Header Custom Fields    Reject Shipment

**Receipt Lines** Personalize | Find | View All | First 1 of 1 Last

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Custom Fields	Cancel Line
1		OPS-A1000 450-1000 W DC	<input type="text" value="1.0000"/>	EA	1.0000	<input type="button" value="Q"/>	<input type="button" value="Q"/>		N			<input type="button" value="Q"/>	Custom Fields	<input type="button" value="X"/>

[Add New Receipt](#) [Inquire Receipts](#)

- 6) The Receipt Confirmation page will display, showing the receipt number and the item(s) received.

**Receipt Saved Successfully**

You have saved receipt # 0000012370 containing the following items:

**Receipt Lines** Personalize | Find | First 1 of 1 Last

Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	OPS-A1000 450-1000 W DC Arc Lamp Power Supply	1.0000		1.0000

[Return to Manage Requisitions](#) [Return to Receiving](#)

- 7) To return to the Manage Requisitions screen, click the “Return to Manage Requisitions” link.

**To delete a receipt, follow the steps below.**

- 1) Navigate to the Manage Requisitions page: Navigator > Financials > eProcurement > Manage Requisitions. Alternatively, select the Procurement Operations homepage and click on the Manage Requisitions tile.
- 2) Using the Search criteria at the top of the page, find the requisition or PO for the item(s) to be received.
- 3) Use the expansion arrow to expand the requisition information.

### Manage Requisitions

Requisition Search Keyword Search

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit <input type="text" value="UTARL"/>	Requisition Name <input type="text"/>	Request State <input type="text" value="Received"/>	Budget Status <input type="text"/>
Requisition ID <input type="text"/>	Date From <input type="text" value="04/01/2019"/>	Date To <input type="text" value="06/19/2019"/>	PO ID <input type="text"/>
Requester <input type="text" value="6001132971"/>	Entered By <input type="text"/>		

Search Clear Show Advanced Search

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000020914	0000020914	UTARL	04/30/2019	Received	Valid	124.38 USD	[Select Action] <span>Go</span>

Requester Sara Barton      Entered By Sara Barton      Priority Medium  
 Pre-Encumbrance Balance      0.00 USD

**Request Lifespan:**

**Line Information** Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	EF 50mm f 1.8 STM Lens CA501...	Received	124.3800	USD	1.0000	EA	B&H PHOTO AND ELECTRONICS CORP

- 4) Click on the "Receiving" icon to open the Manage Receipts page



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5) To cancel a receipt, click the Red “X” for the receipt line.

**Manage Receipts**

**Find a Receipt**

Business Unit:   Show Status:  

Received Date:   To Date:  

Receipt Number:  Requisition Name:

PO Business Unit:   PO Number:

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**Receipts** Personalize | Find | View All |   First  1 of 1  Last

Requisition	Receipt ID	Recv Date	PO ID	Net Received Quantity	Status			
0000020914	0000012355	04/30/2019	0000021226	1.0000	Received			

[Return to Manage Requisitions](#) [Add New Receipt](#) [Manage Return To Supplier](#)

6) To cancel the receipt, click “Yes” to continue. To return without cancelling the receipt, click “No”.

**Cancel Receipt** 0000012355

Cancel receipt cannot be reversed. Are you sure you want to cancel this receipt?

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Received Date 04/30/2019

**Receipt Summary** Personalize | Find |   First  1 of 1  Last

	Item Description	Received Qty	UOM	Accept Qty	PO Number	Due Date	Ship To
1	EF 50mm f 1.8 STM Lens CA5018EFSTM	1.0000	EA	1.0000	0000021226	04/30/2019	CENT110

7) If the receipt was cancelled, the Receive Items page will be displayed. If the receipt was not cancelled, the Manage Receipt page will populate.