

Receiving by Quantity Quick Guide

When the PO is for Buying Goods

Use this guide only when the invoice is \$500 or more

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
S216952	1	3/8" Hero Image Acrylic Art Panels		9 1/EA		9		Received	Remove Line Receive & Return
S216952	2	1/4" Text Acrylic Panels		9 1/EA	A	9	B	Received	Remove Line Receive & Return
S216952	3	Stand-off Mounts		36 1/EA		36		Received	Remove Line Receive & Return
S216952	4	Install Acrylic Panels		9 1/EA		9		Received	Remove Line Receive & Return

For Selected Lines: Remove Selected Items

Getting Started

Anyone in the department can initiate the receipt. However, the reminder for the Receipt automatically goes to the Requestor.

Logging in:

1. Go to Gemini Portal.
2. Enter Net ID and password.
3. Click eProcurement.

Automatic Emails:

1. When AP or the System enters an Invoice in eProcurement, eProcurement tries to match to a department Receipt (if the PO is greater than \$500).
2. **If the PO is less than \$500, the invoice is automatically processed to PeopleSoft to pay in 20 days (net20).**
3. If the PO require a receipt, the system waits one day. Then sends and email reminder to the requestor that an invoice was created and a receipt is required. After 3 days, a reminder email is generated again. This goes on every three days for 20 days.
4. After 20 days, the invoice goes into an exception inbox. AP will then manually comment from the PO for the Requestor or the Shopper to create a receipt. Comment on the PO if there are delays or returns to assist this process.

Receiving Quantities:

5. WHEN as the department receives the goods on the PO, create a receipt. A quantity receipt is normally done for goods. **Do not create the receipt before services are received.** The vendor will not get paid without it.
6. Find the Purchase order and in the "Available Actions" section select **"Create Quantity Receipt" and GO.**

Available Actions

The screen will look like the above.

7. Either select the small boxes (Column C) for the appropriate lines and remove selected items, or put "0" in Column B.
8. Column A is the quantity of items ordered. Column B is quantity of items received. The default is the total amount eligible for Receipt. With multiple shipments, only enter the amount of the current shipment.

10. An invoice from AP is not required to create a receipt. A good business practice is to receive on the PO as soon as department receives the goods.

Tips for Receiving

Invoice Statuses:

1. Invoices in eProcurement will be in a status of :
 - **Payable** (matched Invoice and Receipt),
 - **Paid** (completed payment in PeopleSoft),
 - **Cancelled** (AP cancelled the Invoice) **or**
 - **In Process.** Invoices which are **In Process** are the only invoices in need of receiving.
2. Proper Receiving has the amount **Invoiced** the same as the amount **Received**. When Receipts are off from the Invoice, they will not match in the system and will need to be manually processed into PeopleSoft.
3. Receipts are permanent and cannot be deleted or reversed.
4. Do not turn off notifications in eProcurement. Missed communication will cause delays in payment.