

## Desktop Receiving Job Aid

Receiving is a formal method for documenting the acceptance of goods from vendors. After a purchase order (PO) has been dispatched and the items delivered, the items must be received by the Office of Distributions or by the department. The receiving process involves recording the amount item(s) physically received, along with the date, and comparing them to what was initially 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 requisition is not available to receive the items, contact The Office of Distributions.

1. Navigate to the Receive Items page through the NavBar menu at **Financials > eProcurement > Receive Items**.
2. Find the PO lines on the Receive Items page that need to be received.
  - a. To see the PO numbers, click on the Purchase Order Details tab. You can sort the PO numbers by clicking on the **Purchase Order** column heading.

**Casual Receiving Main Page**

New Window | Help | Personalize Page

**Receive Items**

You have 21 lines open for receiving

Receive Selected

**Requisition Lines to Receive** Personalize | Find | View All | First 1-21 of 21 Last

Req BU	Requisition	Item Description	PO Unit	Purchase Order	PO Qty	Receiving Required
<input type="checkbox"/>	UTARL	LaPosa/Millipore/Iso Alcohol	UTARL	0000044770	2.0000	Optional
<input type="checkbox"/>	UTARL	Muthu/Staples/Officesupplies	UTARL	0000046511	1.0000	Optional

- b. To search for a specific PO, click the **Find** link on the table header.
- c. A window will populate. Enter the PO number.
- d. Click **OK**. UTShare will display the table row that matches the PO number.

zafi-uat.utshare.utssystem.edu

Enter search string:

0000051009

Cancel OK

Personalize Find View All First 1-4 of 4 Last

*UOM	Accept Quantity	Details	Receipt	Status	Group ID	Unit	Amt	Unit Allocation Qty	PO	Custom Fields	Cancel Line
EA	1.0000			Pending		N				Custom Fields	X

3. For all PO lines to be received, check the selection box in the leftmost column of the table.

**Casual Receiving Main Page**

**Receive Items**

You have 18 lines open for receiving

Receive Selected

**Requisition Lines to Receive** Personalize | Find | View All | First 12-18 of 18 Last

Requisition Lines to Receive Purchase Order Details

Req BU	Requisition	Item Description	PO Unit	Purchase Order	PO Qty	Receiving Require
<input checked="" type="checkbox"/>	UTARL	Dr.Clements/LaPetite/EventCoor	UTARL	0000051009	60.0000	Optional
		4/24/23 Celebration of Research & Innovation Planning/Consultation Services(Estimate #1003)				

a. You can receive multiple POs simultaneously if they are all from the same supplier. Click the **Requisition Lines to Receive** tab to see the Supplier field.

**Casual Receiving Main Page**

**Receive Items**

You have 19 lines open for receiving

Receive Selected

**Requisition Lines to Receive** Personalize | Find | View All | First 1-19

Requisition Lines to Receive Purchase Order Details

Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier I
<input type="checkbox"/>	UTARL	NGans/EngravingConcepts/Epilog	EL48ProOne	1	0	EA	667-104			ENGRAVECON-001	
<input type="checkbox"/>	UTARL	NGans/EngravingConcepts/Epilog	ERGAFFM	1	0	EA	667-104			ENGRAVECON-001	

4. Click the **Receive Selected** button to receive the selected lines.

**Casual Receiving Main Page**

**Receive Items**

You have 18 lines open for receiving

Receive Selected

**Requisition Lines to Receive** Personalize | Find | View All | First 12-18 of 18 Last

Requisition Lines to Receive Purchase Order Details

Req BU	Requisition	Item Description	PO Unit	Purchase Order	PO Qty	Receiving Require
<input checked="" type="checkbox"/>	UTARL	Dr.Clements/LaPetite/EventCoor	UTARL	0000051009	60.0000	Optional
		4/24/23 Celebration of Research & Innovation Planning/Consultation Services(Estimate #1003)				

5. On the Receive Items page,
  - a. Adjust the Received Date if necessary (to the date the item was physically received).
  - b. Adjust the Received Quantity if not all items were physically received.

**Note: It is important to adjust the Received Quantity to match what was physically received. For example, if the PO line is for qty 100 and we receive 3 shipments over the course of time (20 in one shipment, 60 in one shipment, and 20 in one shipment), we will create 3 receipts for those quantities. Receiving the incorrect quantities can cause issues with POs and PO vouchers.**

- c. Attach the receipt/packing slip using the Receipt comment bubble button if desired.

### Receive Items

**New Receipt**

\*Business Unit

Receipt Status Open

\*Received Date  a

[Header Comments/Attachments](#)   [Header Cust](#)

Receipt Lines <span style="font-size: small;">?</span>								
Line	Item Id	Item Description	Received Quantity <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">b</span>	*UOM	Accept Quantity	Details	Receipt <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">c</span>	Asset Status
1		RB-KAIROS+ sensors configurati	<input type="text" value="1.0000"/>	EA	1.0000			Pending
2		FRANKA RESEARCH 3 robotic arm	<input type="text" value="1.0000"/>	EA	1.0000			Pending

**Note: Only receive the quantity or amount physically received with the date they were physically received.**

6. Once all the adjustments have been made, click the **Save Receipt** button to save the receipt.

### Receipt Saved Successfully

[New Window](#) | [Help](#) | [Personalize Page](#)

You have saved receipt # 0000029736 containing the following items:

Receipt Lines <span style="font-size: small;">Personalize   Find    </span>				
Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	4/24/23 Celebration of Research & Innovation Planning/Consultation Services(Estimate #1003)	35.0000		35.0000

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

7. To return to the Receive Items page, click the **Return to Receiving link**.