# M@rketplace

## Quick Reference Guide: Receiver

#### **About PO Receiving**

Receiving is required when a Purchase Order (PO) total is over \$5,000, regardless of the amount of each invoice. It is performed by someone with the Requestor or Receiver role within CU Marketplace.

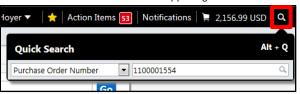
#### **Accessing CU Marketplace**

- 1. Log into your campus portal.
- Locate the top navigation bar and use the Business Tools dropdown menu to select CU Marketplace.

#### **Locating POs**

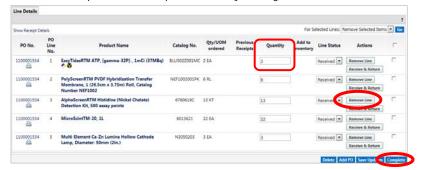
One way to do this is to use the Quick Search function located in the upper right corner.

- 1. Click the Quick Search icon.
- 2. Use the dropdown to select *Purchase Order Number.*
- 3. Enter the PO number in the next field.
- 4. Click the **Search** button.



#### **Entering Receiving (Creating Quantity Receipts)**

- 1. Locate the PO (see above).
- 2. From the **Available Actions** dropdown located in the upper right corner, select *Create Quantity Receipt*.
- 3. Click the Go button.
- 4. Record the items that arrived, or the portion of services performed, in the **Receipt Lines** section located in the bottom part of your screen.
  - Verify the Quantity of each line and update as needed.
  - If a line is not part of this receipt, remove it by clicking the Remove Line button.

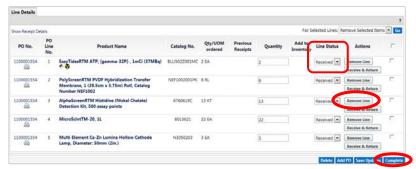


- 5. Click the Complete button located in the lower right corner of the page.
- 6. A confirmation page will appear noting the receipt and PO numbers.

#### Entering Returns (also used to fix erroneous receiving)

Don't forget to contact the supplier to coordinate the return! This process is similar to entering receiving.

- 1. Locate the PO (see left).
- 2. From the **Available Actions** dropdown located in the upper right corner, select *Create Quantity Receipt*.
- Click the Go button.
- 4. If needed, enter **Notes** regarding the return.
- Record the returned items in the Receipt Lines section located in the bottom part of your screen.
  - Indicate the returned Quantity and, from the Line Status dropdown, select Returned.
  - If a line is not being returned or received, remove it by clicking the Remove Line button.



- 6. Click the Complete button located in the lower right corner of the page.
- 7. A confirmation page will appear noting the receipt and PO numbers.

#### **Simultaneous Receiving & Returns**



This process is similar to entering receiving. To receive and return an item in the same step, click the **Receive & Return** button. You will then see two rows for the line: one to indicate the receipt, the other to indicate the return.

### **Viewing Receipt Status**

You can view the receipt status for each line on the PO **Status** page, with details available on the PO **Receipts** page. Steps to locate the PO are detailed on the left.

