

Step-by-Step Guide

Documenting Returned Items (& Fixing Receipts That Are Wrong)

In This Guide

Documenting item returns within CU Marketplace is a similar process to entering receiving. (Incorrect receipts are fixed using the same process as documenting a returned item.) These steps can even be done at the same time receiving is entered for other items within the same Purchase Order (PO).

This guide discusses:

- ✓ Locating POs
- ✓ Documenting returns (fixing wrong receipts)

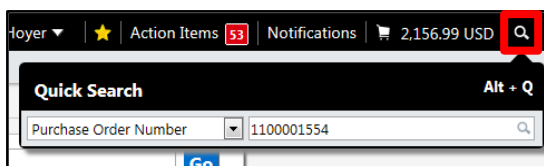
Don't forget to contact the supplier to coordinate a return! This process only *documents* a return – it doesn't communicate a return to the supplier.

Procedure

1. Begin by accessing CU Marketplace via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.
2. Locate your PO using one of the following methods:

Method 1: PO # known

If you know the PO #, use the Quick Search located in the upper right corner of your screen.



Click the Quick Search icon.

Use the dropdown to select *Purchase Order Number* and enter the PO in the next field; click the **Search** button.

Method 2: PO # *not* known

If you do not know the PO #, perform a Document Search. Use your side navigation bar and go to **Orders & Documents > Document Search > Search Documents**.

If needed, click the **advanced search** link. Use the **Search** dropdown and select *Purchase Order*. Enter your search criteria and click the **Go** button.

A list of results will appear. Use the left side of your screen to refine your search further. Select the PO from the resulting list.

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3. Once your PO is displayed, use the **Available Actions** dropdown (located in the upper right corner of the page) and select *Create Quantity Receipt*. Click the **Go** button.
4. On the **draft receipts** page, if needed:
 - a. Enter a unique **Receipt Name**.
 - b. Enter **Notes** regarding the return.
5. Record the returned (or incorrectly received) items in the **Receipt Lines** section located in the bottom part of your screen.
 - Indicate the returned (or incorrectly received) **Quantity** and, from the **Line Status** dropdown, select *Returned*.

The screenshot shows the 'Line Details' section of a software interface. It contains a table with the following columns: PO No., PO Line No., Product Name, Catalog No., Qty/UOM ordered, Previous Receipts, Quantity, Add to Inventory, Line Status, and Actions. There are five rows of data. The 'Line Status' dropdown for the third row is highlighted with a red box and set to 'Received'. The 'Complete' button at the bottom right is also circled in red.

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
1100001554	1	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq)	BLU502Z001MC	2 EA		2		Received	Remove Line Receive & Return
1100001554	2	PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog Number NEF1002	NEF1002001PK	6 RL		6		Received	Remove Line Receive & Return
1100001554	3	AlphaScreenRTM Histidine (Nickel Chelate) Detection Kit, 500 assay points	6760619C	13 KT		13		Received	Remove Line Receive & Return
1100001554	4	MicroScintTM-20, 1L	6013621	22 EA		22		Received	Remove Line Receive & Return
1100001554	5	Multi-Element Ca-Zn Lumina Hollow Cathode Lamp, Diameter: 50mm (2in.)	N3050203	3 EA		3		Received	Remove Line Receive & Return

Buttons at the bottom: Delete, Add PO, Save Update, Complete

- To receive and return an item simultaneously, enter the **Quantity** received and click the **Receive & Return** button. A second row will appear to enter the quantity returned.
 - If a line is not being returned or received (or fixed), 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.

If the returned item is replaced by the supplier, you should enter receiving again to document the replacement.