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.
- 2. Locate your CU Resources section and, under the Business Applications area, select the CU Marketplace link.

Locating POs

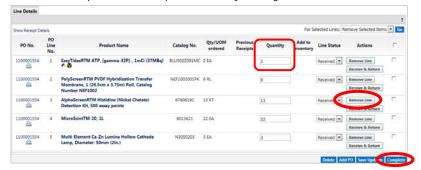
One way to do this is to use the Quick Search function located in the upper right corner.

- 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.

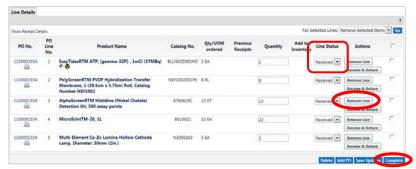


- 5. Click the Complete button located in the lower right corner of the page.
- 6. A confirmation page will appear noting the receipt and PO numbers.

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.

