CU Marketplace How-to: Documenting Returned Items (& Fixing Receipts That Are Wrong) [1]

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).

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.

Locate the Purchase Order

Once the PO is displayed, use the PO actions located in the top-right of the purchase order page and select **Create Quantity Receipt**:


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In the **Summary** tab of the receipt,

1) It is recommended to enter a unique **Receipt Name**
2) Enter the date that the goods/services were received
3) Enter a packing slip as applicable
4) Enter tracking information as applicable
5) Any attachments such as a packing slip should be attached to the receipt
6) Enter any notes as applicable for the return

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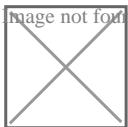
Below this section, record items as necessary

1) the **Quantity** being returned (or incorrectly received)
2) Select the **Status** for the item as *Returned*
3) Indicate why it's being returned if needed
4) To receive and return an item simultaneously, enter the **Quantity** received and click **Receive & Return** icon. A second row will appear to enter the quantity returned
5) If a line is not being returned or received (or fixed), remove it by clicking the **trash**
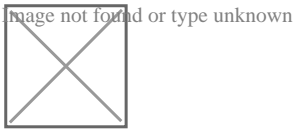
icon
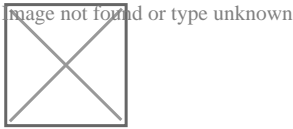
Click **Complete** in the top right of the receipt to finish this receiving:
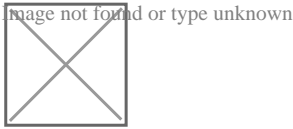
A confirmation page will appear noting the receipt and PO numbers:

In some cases, a supplier might send multiple shipments to fulfill one PO. For example, an item could be on backorder, or a large order might be shipped in multiple boxes which could be separated during shipping. Because of this, it is possible to perform receiving more than once on a given PO.

If returning and item and it is replaced by the supplier, receiving should be entered to document the replacement.

Source URL:https://www.cu.edu/psc/cu-marketplace-how-documenting-returned-items-fixing-receipts-are-wrong

Links
[1] https://www.cu.edu/psc/cu-marketplace-how-documenting-returned-items-fixing-receipts-are-wrong