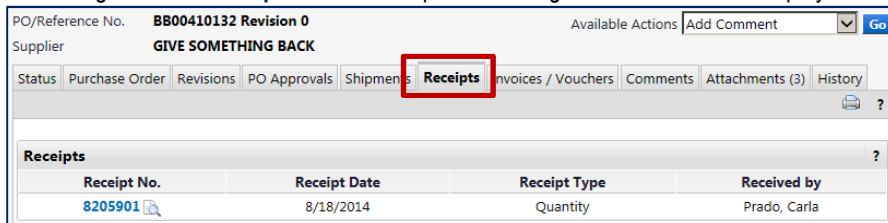


Concepts

- In BearBuy, Receiving is available for record keeping purposes.
- *Receivers* can, against any Purchase Order, receive.
- *Shoppers* can only receive against their own Purchase Orders.
- Receipts can be created for **Cost** or **Quantity**.
 - ✓ **Cost Receipts:** Created for Amount based POs (i.e. Amount only, blankets, etc.)
 - ✓ **Quantity Receipts:** Created for Quantity based POs (i.e. catalog & non-catalog form)
- **Receipts in BearBuy cannot be edited or deleted:**
 - ✓ If a PO has been vouchered.
 - ✓ Error message: Receipt cannot be reopened because receipt has an invoice that has completed workflow.

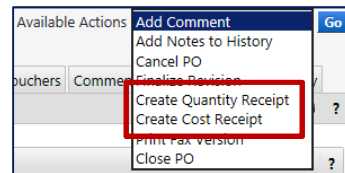
View existing Receipts

1. Navigate to **Orders & Documents>Search Documents menu**.
2. Enter the **Purchase Order** number and select **Search**.
3. From the search results, open the purchase order by **clicking the PO number**.
4. Navigate to the **Receipts** tab. All receipts created against this PO will be displayed.



How to Create a Receipt

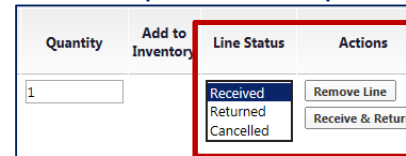
1. Navigate to **Orders & Documents>Search Documents menu**.
2. Enter the **Purchase Order** number and click **Search**.
3. From the search results, open the purchase order by **clicking the PO number**.
4. From the **Available Actions** drop-down box, select **Create Quantity Receipt** or **Create Cost Receipt** click **Go**.
5. The receipt will be automatically populated with the PO information - including remaining number of items to be received.
6. The default **Action** is **Received**, which indicates the item/service was received.
7. Add any additional information such as **Packing Slip, Attachments, Carrier, Tracking** or **Notes**.
8. Review the line level data. Make any updates as needed.
9. Click **Save Updates**, then **Complete**. The Receipt Number displays on the screen.



Create a Receipt with a Return

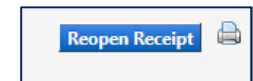
The action at the line detail level is to mark the Line Status as **Returned**.

1. Navigate to **Orders & Documents>Search Documents menu**.
2. Enter the **Purchase Order** number and click **Search**.
3. From the search results, open the purchase order by **clicking the PO number**.
4. From the **Available Actions drop-down** box, select **Create Quantity Receipt** or **Create Cost Receipt**, then click **Go**.
5. The receipt will be automatically populated with the PO information -including remaining number of items to be received.
6. If using a **quantity** receipt, enter the number of items that were canceled or returned in the **Quantity** field.
7. In the **Action drop-down** box, select the appropriate option: **Canceled** or **Return**.
8. Add notes to describe the cancellation or return.
9. Click **Save Updates**, then **Complete**. The Receipt Number displays on the screen.



Edit a Receipt

1. Navigate to the **receipt** that needs to be edited. Make sure the **Summary sub-tab** is displaying.
2. Click **Reopen Receipt** in the upper right-hand corner.
3. A message displays asking if you want to reopen the receipt. Click **OK**.
4. From the pop-up, enter the **"reason"** you are reopening the receipt in the text box.
5. Indicate who should be notified via email of the change by **checking** the appropriate checkboxes or click **add email recipient** to send the note to additional users.
6. Click **Reopen Receipt**. Make any changes to the receipt.
7. Click **Save Updates** and **Complete** when you are finished making changes.



Delete a Receipt

1. Navigate to the **receipt** that needs to be edited. Make sure the **Summary sub-tab** is displaying.
2. Click **Reopen Receipt** in the upper right-hand corner.
3. A message displays asking if you want to reopen the receipt. Click **OK**.
4. From the pop-up, enter the **"reason"** you are reopening the receipt in the text box.
5. Indicate who should be notified via email of the change by **checking** the appropriate checkboxes or click **add email recipient** to send the note to additional users.
6. Click **Reopen Receipt**.
7. **Deleting** the receipt by clicking **Delete** (button at top & bottom of screen).

