Receiving Orders

Purpose

The purpose of the **Receive** functionality is to allow the user the ability to receive items that have been purchased in the system. The user will be able to receive by dollar amount or by quantity or both. Receiving by dollar amount is usually used for services. A packing list will then be attached in the system to the receiving transaction. Accounts Payable will later attach a copy of the invoice and close the record for receiving.

1. Once you are logged into the Western Marketplace through the Western Portal you will land on the Shop Page.

![Western Marketplace](image)

2. You will then need to go to the Receive Tab

![Receive Tab](image)

There are two set-up roles in receiving. A person will either be able to see the entire campus’ orders or their own individual orders.

If the transaction you wish to receive is not visible when you log in, you should filter by using the drop down in the selection box.
You may also enter the transaction # or a PO# and then hit “GO”. There is no need to enter both, one or the other identifying numbers will bring up the transaction.

Step 3: Receive an Item

1. **Select > Transaction**, you are going to receive against.
2. Open the transaction by clicking on the **Blue Arrow so it faces downward**.
3. This will open the transaction down to the Line Item Level.
4. You can either receive by dollar amount or quantity.
5. You will notice the Total Quantity Received and/or Total Dollars Received currently have a 0 with a hyperlink under the 0.
6. By clicking on the hyperlink under the zero will bring up a dialogue box that gives a Receive History of the Items that were order.
7. Put in the number ordered as the number received.
8. Select > Update.
9. Once this is complete the remaining Receive Box (either Dollar or Quantity) will be grayed out.
10. Attach a copy of the packing list.
11. If no packing list was received, make an internal note that no packing list was received.
12. DO NOT close the PO for receiving. Accounts Payable will attach a copy of the invoice and then close the PO for receiving.
13. If you only receive part of an order, you can still put in the items that you receive. The status on the order will change to Partially Received. You can still continue to receive from this order until it’s complete.

After you have entered the number of items you receive, you will hit Update. Do not Hit close. You will then attach a packing slip or make an internal note that there was no packing slip provided.