Create a Receipt

In Workday, you can create full or partial receipts from purchase orders (POs) and supplier contract lines to confirm your receipt of goods or services. The receipt of goods and services serves as verification of the order and indicating the quantity ready to be invoiced. Receipts allow the associated invoices to be matched and routed for further processing.

Receipts should be created when the supplier provides the good or service.

Initiators: All users can create receipts for the orders they can access.

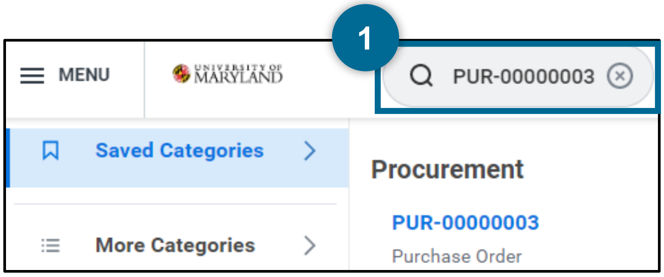
Approvers: No approvals are required for this task. Receipts do not route for review or approvals.

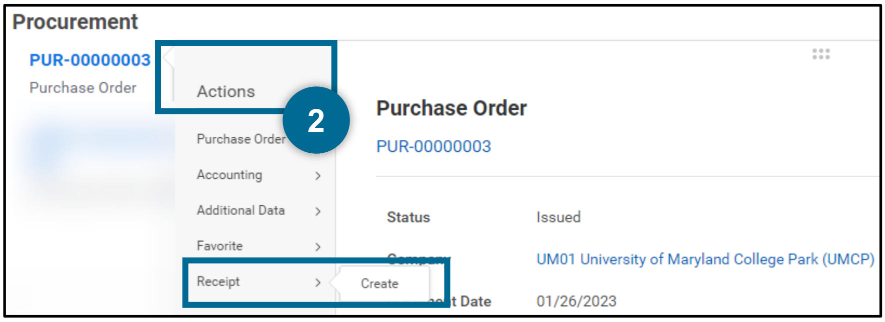
Considerations

- Receipts must be completed and submitted for all purchase orders and contracts over $25,000 for UMCP, UMCES, USMO, and USG.
- Receipts are required for all UMES purchase orders.
- In order for a receipt to be created, the PO must have an *Issued* status or the supplier contract must have an *Approved* status.
- Have your PO number or Contract number available for easy reference.
- You may be prompted to create a receipt for a match exception. When creating a receipt to resolve a Match Exception issue, you will receive a task in your My Tasks. See the Next Steps section of this job aid for more information.

To create a receipt, log in to Workday and complete the following steps:

1. Enter the PO or supplier contract number in the Workday search bar.
2. Select **Related Actions** from the PO or supplier contract. Hover over **Receipt** and then select **Create**.



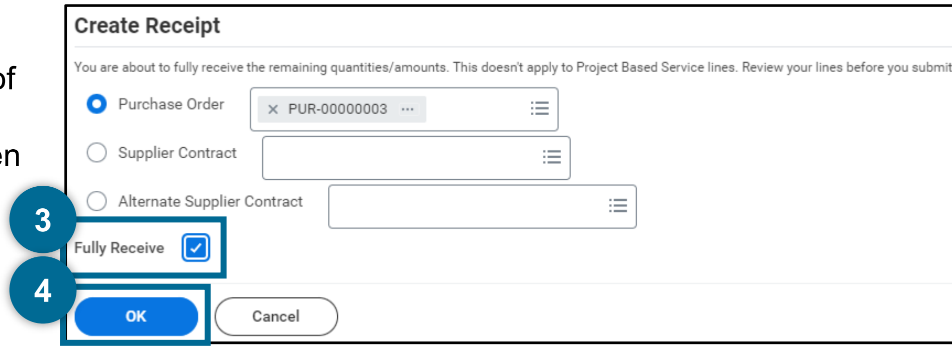


On the Create Receipt popup window:

3. Select the checkbox next to **Fully Receive** if you want to create a receipt for all the goods or services on the Purchase Order or Supplier Contract. Leave the checkbox unchecked if you want to receive a subset pf the items.

Note: Partially received items indicate that not all of the items on the purchase order or contract have been received.

4. Click **OK**.



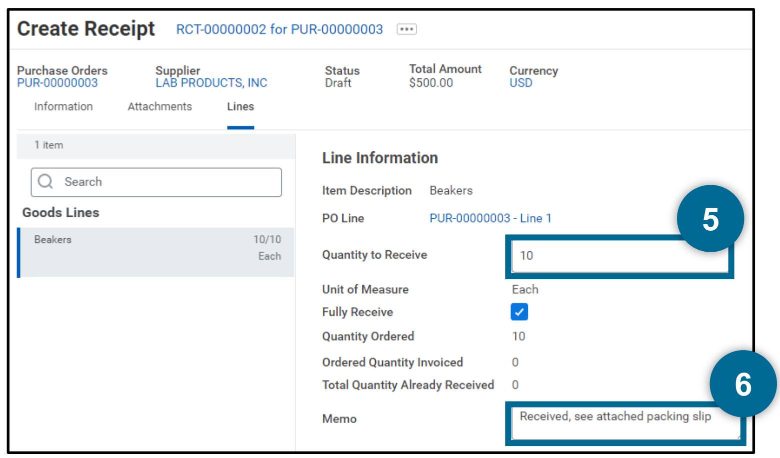
Note: The next screen contains information for all lines associated with the selected PO or Supplier Contract.

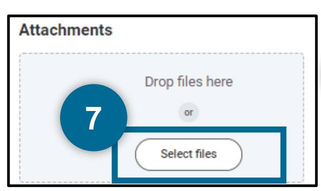
5. For goods lines, enter the **Quantity to Receive**. For service lines, enter the **Amount to Receive**.

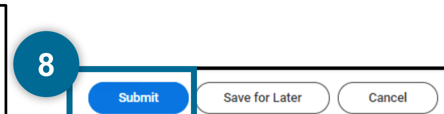
6. *Optional*: Enter a **Memo**.

7. *Optional*: Use the **Attachments** section to upload or drag and drop any supporting documentation for the receipt (e.g., a packing slip from the order).

8. Click **Submit**.







Next Steps

The create receipt task is complete. You can view your receipts by using the Workday search bar to search for the PO or Supplier Contract number and then selecting the associated receipts attached to that procurement document.

When goods are partially received, users should complete these steps again until the purchase order or supplier contract is fully received.

For more information on Match Exceptions, see the **Handle Supplier Accounts Match Events** job aid.