







Create Receipt

Receivers must create a Receipt for all goods and services at the time the goods or services are received to ensure that CUNY pays only for goods and services received in good order and to comply with the Vendor's payment terms.

Prior to entering the receipt, the Receiver is required to:

1. inspect the goods to determine the quantity and quality of the received goods or services.
2. sign and then scan the Vendor's packing slip to their computer's desktop. Name the scanned packing slip document with "Packing Slip, Business Unit, CUNY PO ID, Vendor, and Vendor Invoice Number". i.e., Packing Slip, QNSPR-000000123-Dell-A654321.

Step	Action
1.	Enter https://home.cunyfirst.cuny.edu in your browser's address bar: <ul style="list-style-type: none"> • Enter your Username and Password and click the Log In button. • From the Enterprise Menu, select the Financials Supply Chain link.
2.	Navigate to: <u>eProcurement > Buyer Center > Receipts > Inspect Receipts.</u>
3.	On the Receiving search page Add a New Value tab enter or  look up the Business Unit to match the business unit on the requisition. Note: Leave the default Receipt Number value of NEXT. Note: For goods, ensure the PO Receipt box is checked.
4.	Click the Add button.
5.	On the Select Purchase Order page in the Search Criteria section's ID field, enter the CUNY PO number shown on the Vendor's Packing Slip.
6.	Click the Search button.
7.	In the Retrieved Rows section on the Selected Rows tab, select the <input type="checkbox"/> checkbox of the row with the matching PO ID and Line . Note: Using the CUNY PO number should yield only the lines of the PO.
8.	Click the OK button.
9.	Click the Save button. Note: Click the Save button to trigger the generation of a receipt number by CUNYfirst.
10.	Click the Add Comments link.
11.	In the Comments textbox, enter receipt information such as distributions, rejects, and asset tag IDs.
12.	Click the Shown at Voucher <input type="checkbox"/> checkbox.
13.	In the Associated Document section, click the Attach button.
14.	On the File Attachment pop up window, click the Browse button.
15.	In the displayed Computer window, click Desktop on the menu.
16.	Click the scanned and carefully named Packing Slip document.
17.	Click the Open button.
18.	On the File Attachment pop up window, the name of the document displays. Click the Upload button.

19.	The Maintain Receipts Receipt Header Comments page displays. In the Associated Document section, as an Attachment the name of the uploaded document displays. Note: Select the View button to ensure it is the correct document. Select the Delete button when it is not the correct document.
20.	When there is more than one attachment, click the Add a row  icon and then click the Attach button to begin the attach cycle again from Steps 12-18.
21.	Click the OK button.
22.	Click the Header Details link.
23.	On the Header Details page Receipt Date field, today's date displays as the default. As needed, this date may be overwritten in the mm/dd/yyyy format. Alternatively, select the calendar icon. On the calendar, click the: <ul style="list-style-type: none"> a. left  dropdown menu, and then click the correct month; b. right  dropdown menu, and then click the correct year; and lastly, c. correct day of the month.
24.	Click the OK button.
25.	Click the Document Status link to view related documents. Note: For Receiving, this would be the Requisition and the PO.
26.	On the Document Status page in the DOC ID column, click the link that corresponds to the Document Type you wish to view.
27.	When you have finished viewing a document,  close the additional window.
28.	On the Receipt Lines tab Qty field, enter the number of items received in acceptable condition. Note: Contact Purchasing if the number received in acceptable condition differs from the amount requested.
29.	In the Amt field, enter the dollar value of the items received in acceptable condition.
30.	Select the More Details tab to verify whether or not inspection is required for the item/s. Note: If so, notify the Category Inspector of the need to perform an inspection providing the Receipt ID.
31.	Select the Links and Status tab Distribution  icon to confirm the people to whom the received goods are to be distributed. Note: As needed, distribute the goods to appropriate staff.
	End of Procedure.

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