The receiving receipt feature allows you to enter receiving in TechBuy. All receiving information for TechBuy purchase orders must be submitted through the TechBuy receiving process. All orders must be received, no matter the vendor or type of order, except Direct Pay Orders. For additional information on required receiving, please review HSC OP 72.09.

As a general rule the correct method of Receiving in TechBuy can be determined by the lines on the Purchase Order. If a Purchase Order is set up as each (EA) or month (MON) or itemized at a fixed amount, a Quantity Receipt should be completed. If a Purchase Order is set up as a lot (LOT), job (JA) or Standing Order and the number of items or cost is not defined or if the Purchase order is a Standing Order that will be invoiced as items or services are provided, a Cost Receipt should be completed.

In order to create a receiving receipt, the purchase order must be located.

There are several ways to search for the Purchase Order (PO) using Document Search from the Orders menu navigation located from the TechBuy shopping home page:
- View your purchase orders from My Orders listed under My Purchase Orders.
- Search by requisition number from My Purchase Orders then My Requistions.
- Search for purchase order or requisition number from the Search icon.

For this example, click My Orders and My Purchase Orders.

The My Purchase Orders page displays. Once you have located the appropriate Purchase Order, click the PO Number link in the PO Number column to display the PO you have selected.
The PO Summary page will display.

Creating a Quantity Receipt

In order to document the receipt of specific items or goods, from the PO Summary page, select the Create Quantity Receipt option from the Available Actions dropdown box and select Go.

A draft receipt is created utilizing the information from the purchase order. It includes a Header Information section that contains basic receiving information and a Receipt Lines summary section to enter your actual quantities received.
The following fields are available in the Header Information section:

- **Comments** – The Comments tab will allow you to add comments to the receipt.

- **Receipt No.** – Once the receipt is completed, the system will assign it a numerical document ID. This receipt number can be located from the purchase order to track total receiving by PO.

- **Receipt Date** – As a general rule, the Receipt Date **must be entered as the actual date you physically received the items or goods or the last date of the service provided**.

- **Packing Slip No.** – Enter the packing slip number if it is available.

- **Supplier Name** – The vendor will automatically default from the purchase order.

- **Received By** – This field will automatically default based on your log in credentials.

- **Receipt Address** – The Ship To Address entered on the purchase order will automatically default. You can only change the receipt address if you have additional Ship To Addresses entered into your user profile.

- **Carrier** – Select the appropriate carrier from the dropdown list.

- **Tracking No.** – Enter a tracking number if it is available.
• Flexible Field 2 – This field can be used for additional information. We recommend entering the vendor’s invoice number if it is available.

• Attachments – This field allows you to attach documentation to your receiving receipt such as a scanned copy of the packing slip and / or the vendor’s invoice. Please note that you must still attach all invoices in the PO Comments and copy Accounts Payable as an email recipient for processing.

• Notes – This is an additional field to enter information that will help Accounts Payable or your department. We suggest entering information such as the unit amount and total cost.

The Receipt Lines section is where you will enter the receipt details. The Quantity field will pre-populate with the quantities to be received for each line item. If you have additional goods or services on the order that have not been physically received, you must remove the items from the receipt.

Select the items that should not be included in the receipt by clicking the box to the right of the item(s). Click the Remove Line button, or select the Remove Selected Items from the For Selected Lines: drop-down box and click Go.
The marked items will no longer appear on the receiving receipt. This should leave only items you wish to mark as received, returned, or cancelled. To receive the remaining items on the receipt, verify the quantity is correct for each line item. Before completing the receipt, please verify that you have entered all information correctly. Once the receipt is accurate, click **Complete**.

**Note:** You must not complete a receipt with a “0” (zero) quantity for any line. The quantity must be changed or the line removed to complete the receipt. If receiving is entered with a zero line, the system determines that the item has been received and will process the invoice for payment.

The system will assign a receipt number to the completed receipt document. Click the **Receipt No.** link to view the receipt.
The receipt displays.

Creating a Cost Receipt

In order to document the receipt of services, from the PO Summary page, select the **Create Cost Receipt** option from the Available Actions dropdown box and click **Go**.

A draft receipt is created utilizing the information from the purchase order. It includes a **Header Information** section that contains basic receiving information and a **Receipt Lines** summary section to enter your amount of services received.
The following fields are available in the Header Information section:

- **Comments** – The Comments tab will allow you to add comments to the receipt.

- **Receipt No.** – Once the receipt is completed, the system will assign it a numerical document ID. This receipt number can be located from the purchase order to track total receiving by PO.

- **Receipt Date** – The Receipt Date must be entered as the actual date the services were completed. If services are for a week or month, enter the last day of the week or month. If services are for a year, enter the first day of the service year.

- **Packing Slip No.** – Enter the packing slip number if it is available.

- **Supplier Name** – The vendor will automatically default from the purchase order.

- **Received By** – This field will automatically default based on your log in credentials.

- **Receipt Address** – The Ship To Address entered on the purchase order will automatically default. You can only change the receipt address if you have additional Ship To Addresses entered into your user profile.

- **Carrier** – Select the appropriate carrier from the dropdown list.

- **Tracking No.** – Enter a tracking number if it is available.
• Flexible Field 2 – This field can be used for additional information. We recommend entering the vendor’s invoice number if it is available.

• Attachments – This field allows you to attach documentation to your receiving receipt such as a scanned copy of the packing slip and / or the vendor’s invoice. Please note that you must still attach all invoices in the PO Comments and copy Accounts Payable as an email recipient for processing.

• Notes – This is an additional field to enter information that will help Accounts Payable or your department. We suggest entering information such as the unit amount and total cost.

The Receipt Lines section is where you will enter the receipt details. The Cost field will pre-populate with the cost to be received for each line item. If you have additional services on the order that have not been completed, you will need to remove the items from the receipt.

Select the items that should not be included in the receipt by clicking the box to the right of the item(s). Click the Remove Line button, or select the Remove Selected Items from the For Selected Lines: drop-down box and click Go.
The marked items will no longer appear on the receiving receipt. This should leave only the items you wish to mark as cost received or cost cancelled. To receive the remaining items on the Receipt, verify the Cost is correct for each line item. Before completing the receipt, please verify that you have entered all information correctly. You may **Save Updates** and complete the receiving later or verify that the receipt is accurate and click **Complete**.

The system will assign a receipt number to the completed receipt document. Click the **Receipt No.** to view the receipt.

The receipt displays.
Now that a Receiving Receipt has been created for the PO, you can review the submitted Receipt by using the document search feature under My Orders. Select Orders, My Orders, My Purchase Orders from the Navigation menu. You may either click the PO number, if visible, or enter the PO number in the search textbox.

Select the PO link from the Document Number column.

The PO Summary page will display.
Click the **Receipts** tab to view the Receipts details.

The Receipts page displays. The Receipts page contains two sections. The top section will list all receiving receipts submitted against this PO. You can click a **Receipt No.** to view the receipt detail. The bottom section of the page will provide a summary of receiving for each item. It will show the quantities or cost received and will also provide the amounts that are Open, which have not yet been received.

### Reopen a Receipt to Modify or Delete

When you create a receipt, a mistake can be made by keying in the wrong quantity or the wrong dollar amount. You may even create a receipt against the wrong PO. If you need to reopen a receipt to modify or delete, please contact Accounts Payable at [Accounts.Payable@ttuhsc.edu](mailto:Accounts.Payable@ttuhsc.edu) or by calling 806-743-7826. You will be asked to provide justification or the reason you are requesting the receipt to be reopened.

You will receive an automated email from Jaggaer when the receipt has been reopened or deleted by Accounts Payable. When reopened, the receipt will be in draft mode again so you can modify or delete the receipt completely. When you have completed the modification(s), you must resubmit the receipt.
If an invoice has already paid on the PO, you must enter a negative receipt to correct the quantity or amount. You can place a negative sign in front of the amount or quantify that you need to adjust down.

When attaching invoices or other attachments, name the file the invoice number or document title. Remember to select Accounts.Payable@ttuhsc.edu as an email recipient of any comment.

For additional information about TechBuy Receiving, please contact Accounts Payable at Accounts.Payable@ttuhsc.edu.