

How to Receive in PeopleSoft

Please Note: there are several ways to receive in PeopleSoft as illustrated below. You may choose the option that works best for you

Receiving items in PeopleSoft is an important part of the 3 Way matching rule within PeopleSoft. It compares invoices with purchase orders and receiving documents.

- 3 Way-Matching is a control measure used to ensure that you pay for only the goods and services that you ordered and received.
 - 3 Way Matching: PO > Invoice > Receipt of Goods/Services = Payment
- Receiving your requested goods and service is the trigger for Accounts payable to pay and how much to pay.
- With 3 Way-Match if the lines on the Purchase Order, Receipt, and Invoice do not match, payment will not be made.

How to receive using the 'Manage Requisitions' page

If you are the Requisitioner, you can receive your requested goods or services from the 'Manage Requisition' page. Navigation Path: Main Menu > eProcurement > Manage Requisitions

Select Requisition to be received (you may need to change your **date parameters** to view all requisitions)

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: USC01 | Requisition Name: | Budget Status: |

Requisition ID: | Request State: All but Complete |

Date From: 10/29/2015 | Date To: 10/30/2015 |

Requester: JANETMJ | Entered By: | PO ID: |

Search | Clear | Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
▶ 1000010638	Carry Forward Xerox A9700	USC01	10/29/2015	PO(s) Dispatched	Valid	1,309.95 USD [Select Action] Go

Select action – 'Receive' (from drop down box) > Select Go.

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
1000010638	Carry Forward Xerox A9700	USC01	10/29/2015	PO(s) Dispatched	Valid	1,508,950.00

Receive Go

This is the next pop out screen. Select the box --next to the items to be received. Select **Receive Selected**.

Receive Items

You have 1 line open for receiving for requisition Carry Forward Xerox A9700

Receive Selected and go to the Receive Form.

Requisition Lines to Receive

Personalize | Find | View All | First 1 of 1 Last

Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
<input checked="" type="checkbox"/>	USC01	Carry Forward Xerox A9700	Maintenance Service for Xerox Copier XC570, Serial # XPN-553743 for period 8/25/2015 - 9/27/2015	1	0	EA	908		Janet Joy	XEROX CORP-001	

Check All Clear All

[Inquire Receipts](#)

Please Note: You will either receive your goods or services by quantity or amount, depending on how the purchase order was set up. See examples below.

This is the next pop out screen. Enter Received Quantity. You can also add comments and attachments for your records. (Add Header Comments) Select **Save Receipt**.

Receive Items

New Receipt

Business Unit USC01

Receipt Status Open

*Received Date 10/30/2015 x

Add Header Comments

Reject Shipment

Receipt Lines ?

Personalize | Find | View All | First 1 of 1 Last

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1		Maintenance Service for	1.0000	EA	1.0000				N				

Save Receipt

[Add New Receipt](#)

[Inquire Receipts](#)

This is the next pop out screen. **Enter Received Amount.** You can also add comments and attachments for your records. (Add Header Comments) Select **Save Receipt.**

Receive Items

New Receipt

Business Unit USC01

Receipt Status Open

*Received Date 01/20/2016

Add Header Comments

Receipt Lines													Personalize	Find	View All	First	1 of 1	Last
Line	Item Id	Item Description	Currency	Received Amount	Received Quantity	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line				
1		Prospective Students' N	USD	15000.00000	1.0000	1.0000				N								

Save Receipt

Add New Receipt

Inquire Receipts

Receipt Saved Successfully

You have saved receipt # 3000005816 containing the following items:

Receipt Lines				Personalize	Find	View All	First	1 of 1	Last
Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity					
1	Maintenance Service for Xerox Copier XC570, Serial # XPN-553743 for period 8/25/2015 - 9/27/2015	1.0000		1.0000					

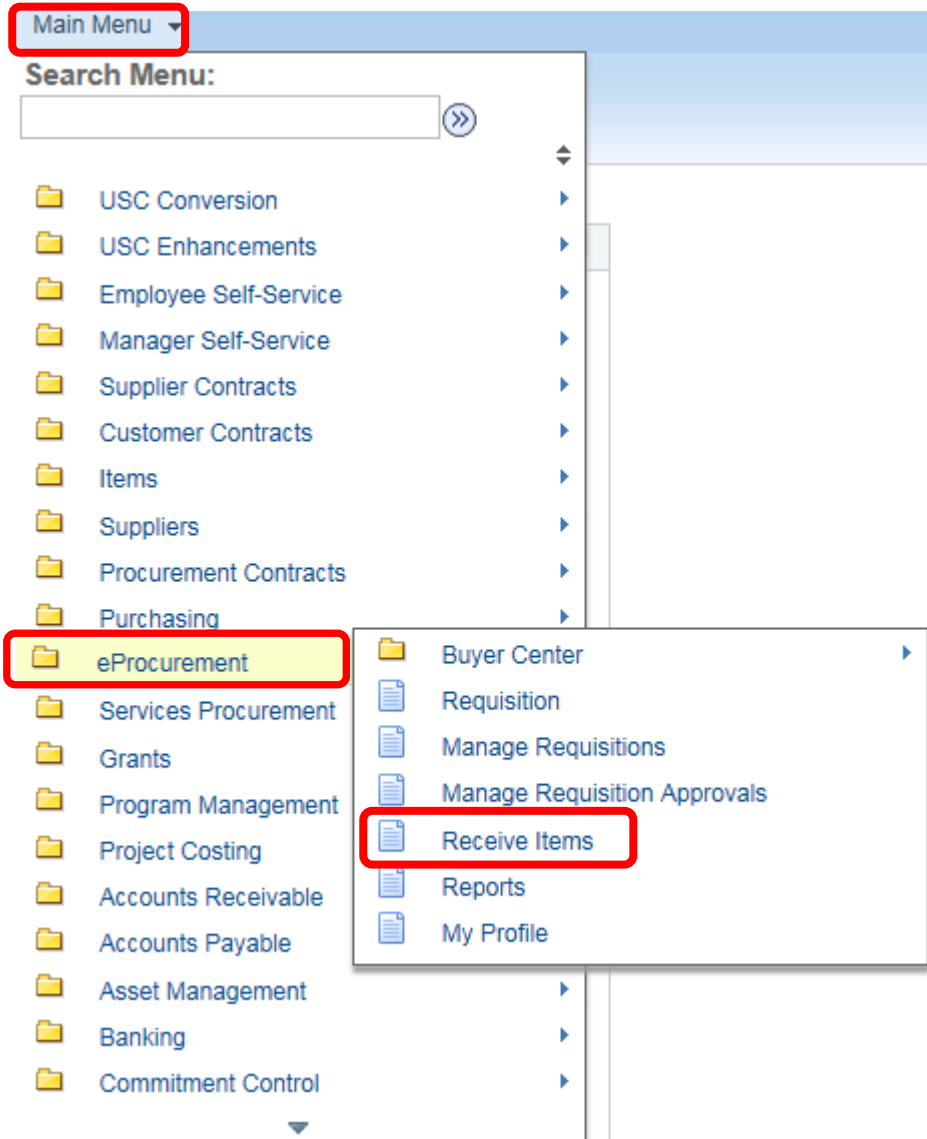
[Return to Manage Requisitions](#)

[Return to Receiving](#)

How to 'Receive' using the 'eProcurement Receive Items' Page

This view will show you all the items on one page that are waiting to be received.

Navigation Path: Main Menu > eProcurement > Receive Items



Select the Box- next to the items to be received. You can only receive for one supplier at a time. After you have selected the items, Select **Receive Selected**.

Receive Items

You have 15 lines open for receiving

Receive Selected and go to the Receive Form.

Requisition Lines to Receive Personalize | Find | View All | First 1-15 of 15 Last

Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Recv By	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
<input type="checkbox"/>	USC01	ACT	Prospective Students' Names 2015-2016 School Year	15000	0	EA	Amount	905-101		Janet Joy	ACTINC-001	
<input type="checkbox"/>	USC01	College Board	Purchase of Prosective Student Names 2015-16	25000	0	EA	Amount	POBU		Janet Joy		
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	30" Wind Screen W210-21844530	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Grill Brick, 8"L x4"Wx3 1/2"H #269-630	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Add On Griddle W210-T-1209U	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Charbroiler Gas Outdoor S/S Includes free Vinyl Cover #210-081 Gas Type LP	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	30" Roll Top Cover W210-21844530	2	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Vinyl Cover W210-21841040	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Turner, 8" x 3", Long Handle Rosewood Handle, 20" Overall #973-080	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Freight	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Managers Coupon	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	
<input type="checkbox"/>	USC01	Central Restaurant - Jeff	Char-Brush Coarse 611-024	1	0	EA	Qty	908		Jeff Jenik	CENTRALRES-001	

Check All **Clear All**

[Inquire Receipts](#)

Please Note: You will either receive your goods or services by quantity or amount, depending on how the purchase order was set up. See examples below.

Enter quantity received in the Received Quantity field. Select **Save Receipt**.

Receive Items

New Receipt

Business Unit USC01

Receipt Status Open

*Received Date 11/06/2015

Add Header Comments

Reject Shipment

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1		SOK-Off Heavy Duty Gre	1	QTL	1.0000				N				

Save Receipt

Add New Receipt

Inquire Receipts

Enter amount received in the Received Amount field. Select **Save Receipt**.

Receive Items

New Receipt

Business Unit USC01

Receipt Status Open

*Received Date 01/20/2016

Add Header Comments

Line	Item Id	Item Description	Currency	Received Amount	Received Quantity	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1		Prospective Students' N	USD	15000.00000	1.0000	1.0000				N				

Save Receipt

Add New Receipt

Inquire Receipts

Receipt Saved Successfully

You have saved receipt # 3000005818 containing the following items:

Line	Item Description	Received Amount	Received Quantity	Reject Quantity	Accept Quantity
1	Prospective Students' Names 2015-2016 School Year	15000.00000	1.0000		1.0000

[Return to Manage Requisitions](#)

[Return to Receiving](#)

How to “Unreceipt” if an error was made in receipting.

Navigation: Main Menu > Purchasing > Receipts > Add/Update Receipts

Select Find an Existing Value

Business Unit

Receipt Number

PO Receipt

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

You can search by entering Receipt Number, PO Number, etc. Enter information and select **Search**.

Receiving

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

▼ **Search Criteria**

Business Unit	=	▼	USC01	
Receipt Number	begins with	▼		
Bill of Lading	begins with	▼		
PO Business Unit	begins with	▼		
Item ID	begins with	▼		
PO Number	begins with	▼	2000012297	
Ship To Location	begins with	▼		
Shipment Number	begins with	▼		
Supplier ID	begins with	▼		
Received Date	=	▼		
Receipt Status	=	▼		▼
User ID	begins with	▼		


Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

Select either Red X to delete the receipt.

Maintain Receipts
Receiving



Business Unit USC01 Receipt Status Fully Received 



Receipt ID 300005735 Add Header Comments Activities

Header Details Document Status







▶ Header

Select Purchase Order Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines Personalize | Find | View All |  |  First 1 of 1 Last

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Stock UOM	Device Track
1		Maintenance Service for Xerox	1.0000	EA	1309.95000	1.0000	Received	523	<input type="checkbox"/>		<input type="checkbox"/>	EA	

Interface Receipt Run Close Short Interface Asset Information

 Save  Return to Search  Notify  Refresh  Add  Update/Display

You will receive this message. To continue with the cancellation of the receipt select 'Yes'.

Message


Canceling Item cannot be reversed. Do you wish to continue? (10300,46)

Select **Save**. The item(s) will be returned to your receiving page. You will need to re-receipt once the corrections have been made.

UNIVERSITY OF SOUTH CAROLINA Home

Maintain Receipts
Receiving



Business Unit USC01 Receipt Status Fully Received 


Receipt ID 300005941 Add Header Comments Activities

Header Details Document Status









▶ Header

Select Purchase Order Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines Personalize | Find | View All |  |  First 1 of 1 Last

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Stock UOM
1		SOK-Off Heavy Duty Grease Remo		QTL	18.69000		Canceled	578	<input type="checkbox"/>		<input type="checkbox"/>	QTL

Interface Receipt Run Close Short Interface Asset Information

 Save  Return to Search  Previous in List  Next in List  Notify  Refresh  Add  Update/Display

You will then receive the following message confirming the receipt has been canceled. Select OK.

Message

Receipt, 3000005737, is saved and Job, RECV_00, has been scheduled for process (Process Instance = 138838). (10300,253)

This means the receipt is being updated by the receipt integration process. Any additional processing for this receipt will require reopening the receipt in Update / Display mode.

USC



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How to Receive in PeopleSoft

**A Quick Reference Guide for Receiving in PeopleSoft
Procurement
Revised January 2016**

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Why is it important to Receive in PeopleSoft



Receiving in PeopleSoft is an important part of the 3 Way Matching rule within PeopleSoft. It compares vouchers with purchase orders and receiving documents.

3 Way Matching is a control measure used to ensure that you pay for only the goods and services that you order and receive.

Receiving your requested goods and service is the trigger for Accounts Payable to pay and how much to pay.

If the lines on the Purchase Order, Receipt, and Voucher do not match, payment will not be made.

How to Receive using the Add/Update Receipts Page

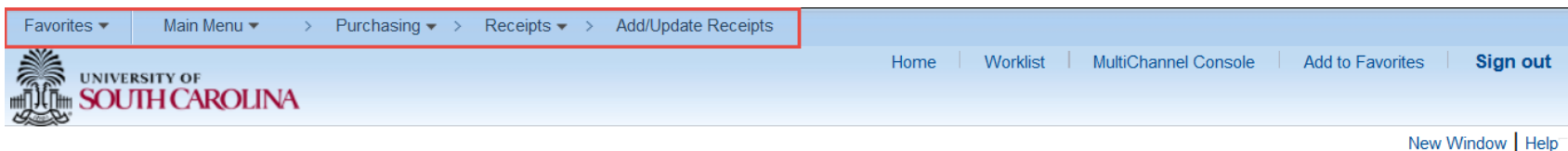


If you are the Requisitioner or the individual who received the goods or service, you can receive on the Add/Update Receipts page.

- Navigation Path: Main Menu → Purchasing → Receipts → Add/Update Receipts

Follow the steps below to receive on this page:

1. Click the Add a New Value tab and then click the Add button.
2. Click the Add button.



Receiving

A screenshot of the "Receiving" form in the OneCarolina system. The form has a light blue header with three tabs: "Find an Existing Value", "Keyword Search", and "Add a New Value". The "Add a New Value" tab is highlighted with a red box and a red circle containing the number "1". Below the tabs are several input fields: "Business Unit" with the value "JSC01" and a search icon, "Receipt Number" with the value "NEXT", and "PO Receipt" with a checked checkbox. At the bottom left of the form is a yellow "Add" button, which is highlighted with a red box and a red circle containing the number "2".

How to Receive using the Add/Update Receipts Page



3. Click in the PO ID field and type in a PO ID.

4. Click Search button.

The screenshot shows the "Add/Update Receipts" page in the University of South Carolina's purchasing system. The breadcrumb trail at the top reads: Favorites > Main Menu > Purchasing > Receipts > Add/Update Receipts. The page header includes the University of South Carolina logo and navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. A secondary navigation bar contains links for New Window, Help, and Personalize Page.

The main content area is titled "Select Purchase Order" and contains a "Search Criteria" section. This section includes several input fields: PO Unit (containing "USC01"), ID (containing "2000002577"), Days +/- Today, Start Date, End Date, Supplier Name, Supplier Item ID, Manufacturer ID, and Manufacturer's Item ID. There are also fields for Line / Schedule, Release, Item ID, Ship To, and Ship Via. A checkbox labeled "Retrieve Open PO Schedules" is checked.

At the bottom of the search criteria section is a "Search" button. Below this is a "Receipt Qty Options" section with three radio button options: "No Order Qty", "Ordered Qty", and "PO Remaining Qty" (which is selected).

Red annotations are present: a red box around the ID field with a red circle containing the number "1" next to it, and a red box around the Search button with a red circle containing the number "2" next to it.

How to Receive using the Add/Update Receipts Page



5. Select the lines you want to receive and click OK.

Retrieved Rows Personalize | Find | View All | [Print] | [Export] First 1-2 of 2 Last

Selected Rows Shipping Related More Details [More]

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	USC01	2000002577	1	1		07/24/2015	20.0000			Mac Mini Computer, 2.6 GHz Dua
<input checked="" type="checkbox"/>	USC01	2000002577	2	1		07/24/2015	20.0000			AppleCare Protection Plan for

Select All Clear All

6a. In this example, identify the quantity received and click Save. (Note: If you received only 18 of the 20 items be sure to indicate this in the **Receipt Qty** field before clicking the Save button.)

Receipt Lines Personalize | Find | View All | [Print] | [Export] First

Receipt Lines More Details Links and Status Item / Mfg Data Optional Input Source Information [More]

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Devic Track
1		Mac Mini Computer, 2.6 GHz Dua	<input type="text" value="20.0000"/>	EA	1039.00000	20.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Devi
2		AppleCare Protection Plan for	<input type="text" value="20.0000"/>	EA	79.00000	20.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Devi

Interface Receipt Run Close Short Interface Asset Information

How to Receive using the Add/Update Receipts Page



6b. In this example, identify the amount received and click Save.

Receipt Lines Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Receipt Lines [More Details](#) [Links and Status](#) [Item / Mfg Data](#) [Optional Input](#) [Source Information](#) [Filter]

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Device Track
1		Disposal of front load MSW (Mu	1.0000	110000.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track

Interface Receipt Run Close Short [Interface Asset Information](#)

How to Receive using the Add/Update Receipts Page



7. Go to the Document Status page, to view the Receipt.

- Navigation Path: Main Menu → Purchasing → Purchase Orders → Review PO Information → Document Status

[Favorites](#) | [Main Menu](#) > [Purchasing](#) > [Purchase Orders](#) > [Review PO Information](#) > [Document Status](#)

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[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

Business Unit USC01 **PO ID** 2000002577
Document Date 07/20/2015 **Status** Dispatched
Currency USD **Document Type** Purchase Order
Buyer Kevin Sanders **Merchandise Amt** 22,360.00
 Budget Status Valid

[Requisitions\(1\)](#) | [Procurement Contracts](#) | [Purchase Orders](#) | **[Receipts\(1\)](#)** | [Returns](#) | [Vouchers](#) | [Payments](#)

[Show All](#)

Associated Document Personalize | Find | View All | First 1 of 1 Last

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	USC01	Receipt	3000003217	Received	10/01/2015	C000001490	0001

[Return to Search](#)

Where to find this Quick Reference Guide



UNIVERSITY OF SOUTH CAROLINA

CALENDAR MAP DIRECTORY Search SC.edu GATEWAYS

The Division of **Information Technology**

SC.edu » Abol » Office » The I » PeopleSoft » Resources

Resources

Click a link below to download the selected resource

General UPK Information <ul style="list-style-type: none">• How to Use the UPK Player »	General PeopleSoft Information <ul style="list-style-type: none">• USC PeopleSoft Glossary »• Request for PeopleSoft Finance Access »
PeopleSoft Chart of Accounts <ul style="list-style-type: none">• PeopleSoft Chart of Accounts »• New Code Structure »• A Quick Reference Guide to Categories »	PeopleSoft Workflow <ul style="list-style-type: none">• ePro Requisition Approval Workflow »• Workflow Tip 1 »• Workflow Tip 2 »• Department Approvers »
Payment Request Information <ul style="list-style-type: none">• Payment Request Matrix »• Payment Request Guidelines »	eProcurement Information <ul style="list-style-type: none">• Quick Reference for Amount Only vs. Quantity »• Quick Reference for Receiving in PeopleSoft »• Quick Reference for Change Orders »