

## Job Aid: How to Complete a Partial Receipt

### This Job Aid Shows How To:

- Receive items in COMMBUYS

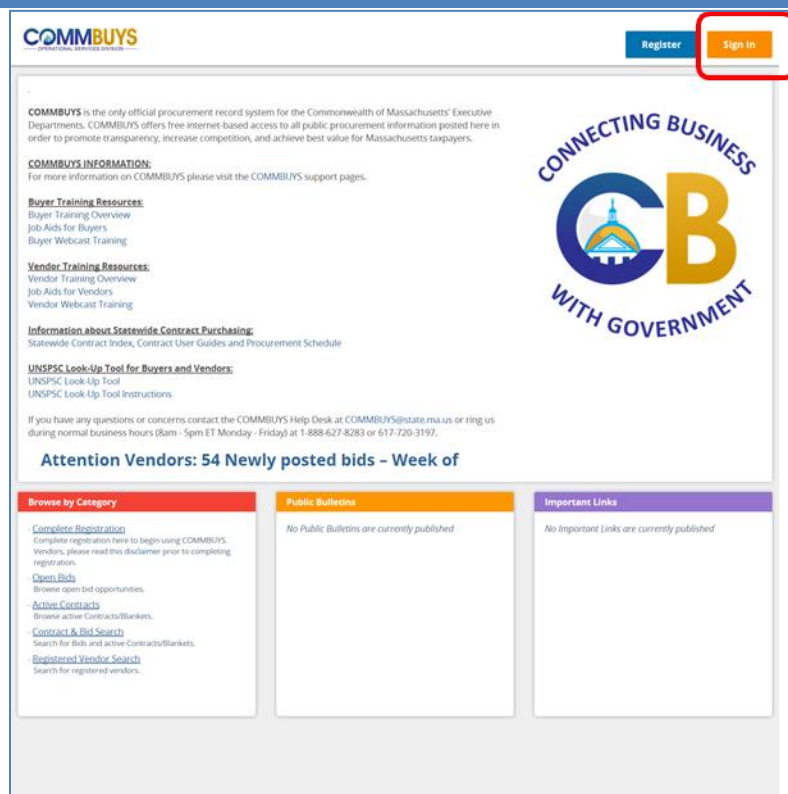
### Of Special Note:

Before a receipt can be processed, there must be a purchase order (PO) in Sent status. The receiving of goods and services may be either complete receipt or partial receipt. Items that are being returned must be received and then returned. The receipt of items can also be cancelled without first receiving them. This Job Aid shows how to process a partial receipt using one (1) PO. When completed, a Receipt Number is assigned with an updated status of Approved for Invoice.

Individuals within an agency or department who receive and/or create requests for payments will find this document useful. These users **MUST** process receiving within the Basic Purchaser role or within the Department Access role with permission given to receive.

### Screenshot

### Directions



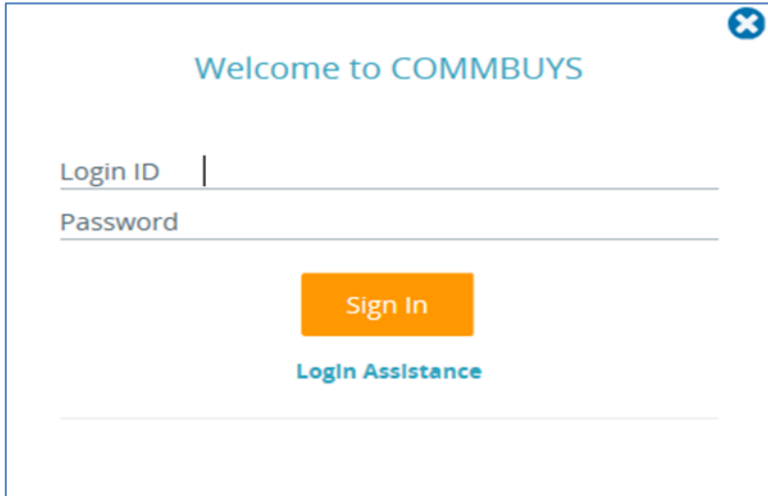
### Step 1: Log-in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.

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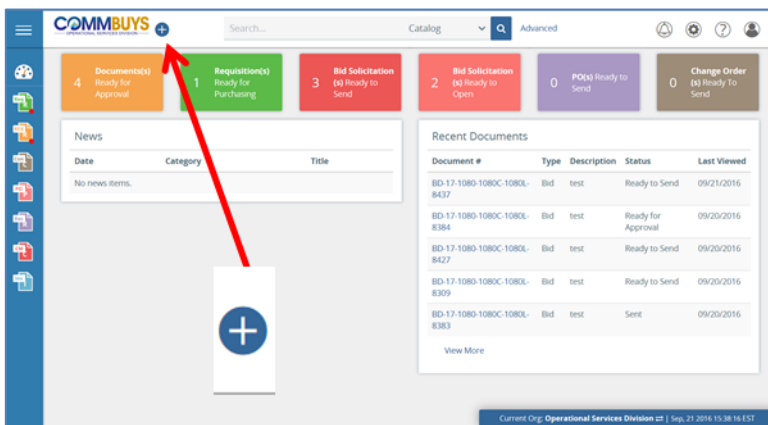
### Screenshot

### Directions



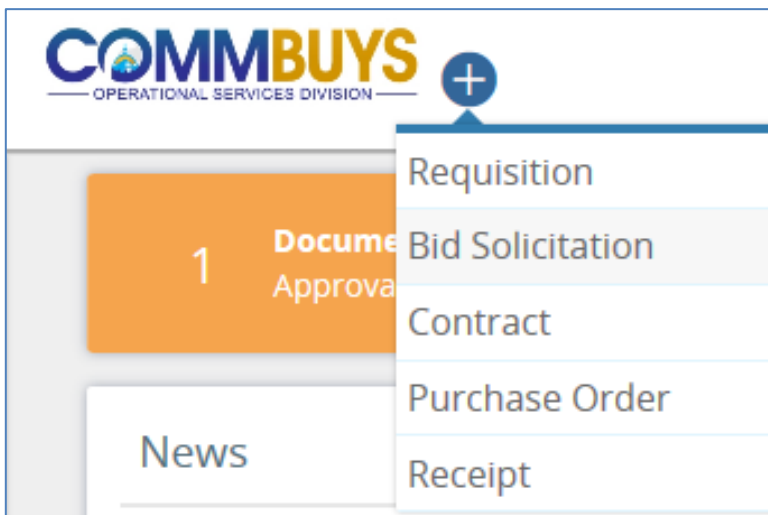
#### Step 2: Logging In

1. Enter your Login ID and Password.
2. Click on the **Sign In** button.



#### Step 3: Clicking the Add Documents Icon

Click on the **Add Documents** (plus sign) icon.



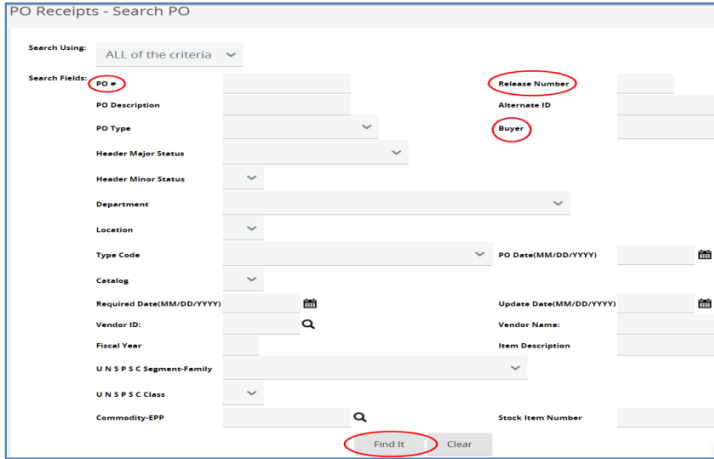
#### Step 4: Selecting Receipt

Select **Receipt** from the dropdown menu.

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PO Receipts - Search PO

Search Using: ALL of the criteria

Search Fields:

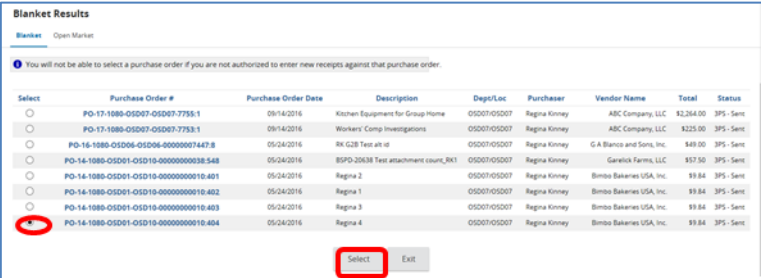
- PO #
- PO Description
- PO Type
- Header Major Status
- Header Minor Status
- Department
- Location
- Type Code
- PO Date(MM/DD/YYYY)
- Catalog
- Required Date(MM/DD/YYYY)
- Update Date(MM/DD/YYYY)
- Vendor ID
- Vendor Name
- Fiscal Year
- Item Description
- U N S P S C Segments-Family
- U N S P S C Class
- Commodity-EPP
- Stock Item Number

Find It Clear

#### Step 5: Locating a PO

The PO Receipts – Search PO page displays.

1. Locate the PO using any of these search fields:
  - PO#
  - Release Number
  - Buyer
2. Press **Enter** on your keyboard or scroll to the bottom of the screen and click on the **Find It** button.



Blanket Results

Blanket Open Market

You will not be able to select a purchase order if you are not authorized to enter new receipts against that purchase order.

Select	Purchase Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total	Status
<input type="radio"/>	PO-17-1080-OSD07-OSD07-7755-1	09/14/2016	Kitchen Equipment for Group Home	0500705007	Regina Kinney	ABC Company LLC	\$2,264.00	3FS- Sent
<input type="radio"/>	PO-17-1080-OSD07-OSD07-7753-1	09/14/2016	Workers' Comp Investigations	0500705007	Regina Kinney	ABC Company LLC	\$125.00	3FS- Sent
<input type="radio"/>	PO-16-1080-OSD06-OSD06-00000007447-8	05/24/2016	RK G2B Test an st	0500705007	Regina Kinney	G A Blanco and Sons, Inc	\$40.00	3FS- Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD10-0000000038-548	05/24/2016	BPPO-20638 Test attachment court_RK1	0500705007	Regina Kinney	Garwick Farms, LLC	\$07.50	3FS- Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD10-0000000010-401	05/24/2016	Regina 2	0500705007	Regina Kinney	Bimbo Bakeries USA, Inc	\$9.84	3FS- Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD10-0000000010-402	05/24/2016	Regina 1	0500705007	Regina Kinney	Bimbo Bakeries USA, Inc	\$9.84	3FS- Sent
<input type="radio"/>	PO-14-1080-OSD01-OSD10-0000000010-403	05/24/2016	Regina 3	0500705007	Regina Kinney	Bimbo Bakeries USA, Inc	\$9.84	3FS- Sent
<input checked="" type="radio"/>	PO-14-1080-OSD01-OSD10-0000000010-404	05/24/2016	Regina 4	0500705007	Regina Kinney	Bimbo Bakeries USA, Inc	\$9.84	3FS- Sent

Select Exit

#### Step 6: Selecting a PO

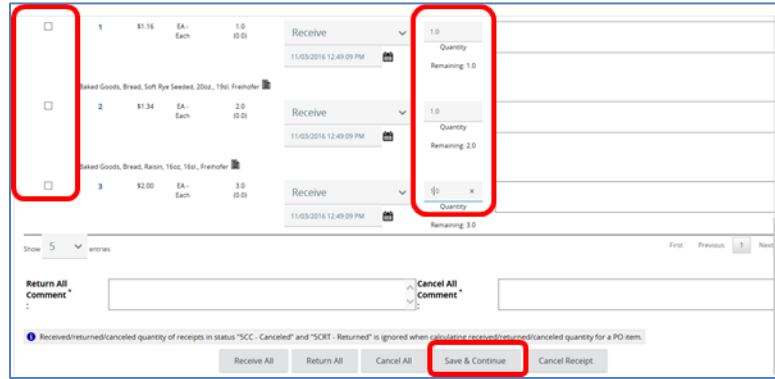
The search results display at the bottom of your screen in the Blanket Results section.

1. In the **Select** column, click on the radio button next to the PO you want to receive.
2. Click on the **Select** button at the bottom of the screen.

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Item #	Unit Cost	Unit	Quantity	Quantity / Dollars
1	\$1.16	EA- Each	1.0	1.0
2	\$1.34	EA- Each	2.0	2.0
3	\$2.00	EA- Each	3.0	3.0

Buttons: Receive All, Return All, Cancel All, **Save & Continue**, Cancel Receipt

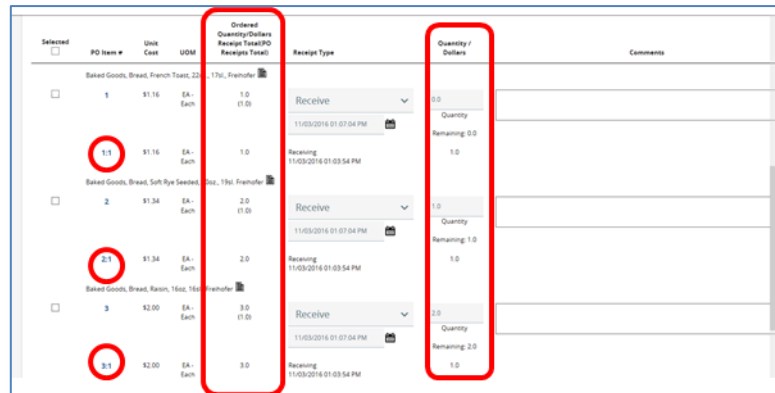
#### Step 7: Receiving

The Receipt page displays. Move down to the Item Information section of the page. The Receipt Type column defaults to Receive.

1. In the **Selected** column, enter a check in the box next to each item received.
2. Adjust the quantity of goods received by entering the number of each item in the Quantity/Dollars column.

In this example, we entered 1 case received for each item ordered.

3. Click on the **Save & Continue** button.



Selected	PO Item #	Unit Cost	Unit	Ordered Quantity/Dollars Receipt Total(SPO Receipts Total)	Receipt Type	Quantity / Dollars
<input checked="" type="checkbox"/>	1	\$1.16	EA- Each	1.0 (1.0)	Receiving	1.0
<input checked="" type="checkbox"/>	2	\$1.34	EA- Each	2.0 (2.0)	Receiving	2.0
<input checked="" type="checkbox"/>	3	\$2.00	EA- Each	3.0 (3.0)	Receiving	3.0

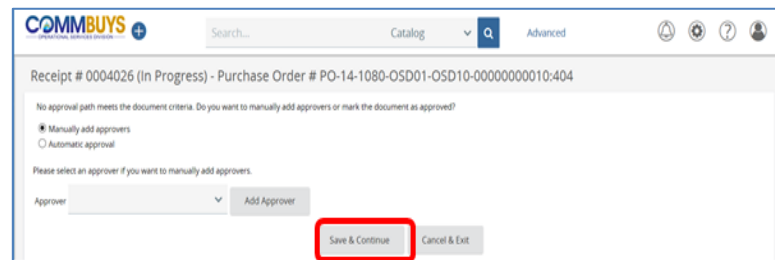
#### Step 8: Validating the Receipt

The Ordered Quantity/Dollars Receipt Total (PO Receipts Total) column is updated with numbers in parentheses that reflect the quantity received.

A new row has been added to each line item as 1:1, 2:1, 3:1, etc.

The Quantity/Dollars column is updated to show both the quantity received and the quantity remaining.

Click on the **Submit for Approval** button at the bottom of the page.



Receipt # 0004026 (In Progress) - Purchase Order # PO-14-1080-OSD01-OSD10-0000000010:404

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers  
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver:  Add Approver

**Save & Continue** Cancel & Exit

#### Step 9: Submitting for Approval

Each agency sets up their specific approval path for receipts.

1. Select the appropriate approval choice.
2. Click on the **Save & Continue** button.

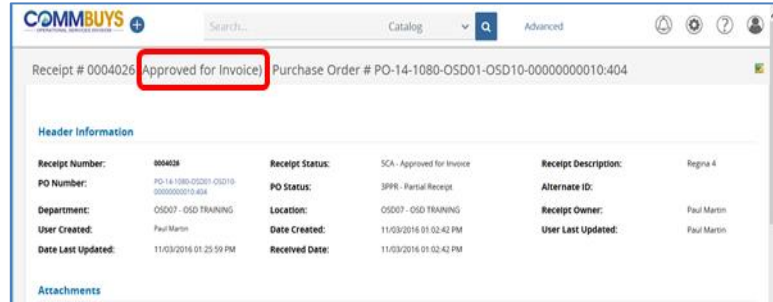
The receipt is now in Ready for Approval status until approved.

In our scenario, we do not have an approval path for receiving items, so we selected Automatic approval and clicked on the **Save & Continue** button.

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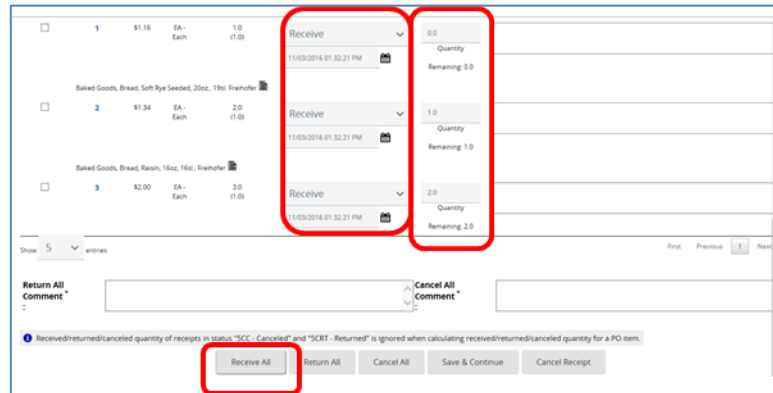
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#### Step 10: Verifying Approval

Once your receipt is approved, it will be placed in the Approved for Invoice status.



#### Step 11: Receiving the Remaining Items

- To receive the remaining items, repeat Steps 1-6.
- When the Receipt page displays, the remaining item quantities are in the Quantity/Dollars column and the Receipt column defaults to Receive. Ensure that each line item's receipt status is marked as **Receive**.
- Scroll to the bottom of the page and click on the **Receive All** button. The remaining quantity resets to zero and a popup screen appears asking if you want to receive all remaining items.
- Click on the **OK** button.
- Repeat Steps 8-10.

