Quick Reference Guide

Creating a Quantity Receipt

In this Guide

- Navigating to receipt history
- Creating cost receipts
- Alternate navigation to search for PO numbers

This guide demonstrates how to create quantity receipts for purchase orders.

Receiving is required for equipment, Professional Services and Construction purchase orders. However, receiving can be done on all POs until it is closed in the system.

Procedure

1. To create a receipt, navigate to the Orders & Document icon from the navigation bar on the left side of the screen in LSU GeauxShop.

2. Click Document Search → Search Documents
3. Select Purchase Order from the search drop-down list.
4. Enter the purchase order number in the search field, and then click the Go button.

Alternate Navigation: If you do not know the PO number, you can click on the my purchase orders link on the document search page.

5. In the search results, click the checkbox associated with the PO number. Then select Create Quantity Receipt from the drop-down list and click the Go button.
Creating a Quantity Receipt

6. On the Receiving History page, enter the Header Information:
   a. Enter a unique Receipt Name (if needed).
   b. Enter the Packing Slip Number and attach a scan of the packing slip for records purposes (if needed).

   ![Screenshot of LSU GeauxShop UIT interface showing Header Information]

7. Enter the Receipt Summary information. (This guide illustrates a partial receipt example, in which only 1 of 2 lines is received.)
   a. Remove line 2 by clicking the checkbox for that line to select it, and selecting Remove Selected Items from the drop-down list. Alternately, you can click the Remove Line button.
   b. Click the Go button.

   ![Screenshot of Receipt Line Details showing removal of line 2]

8. The draft receipts page is updated and now only includes line 1.
9. Confirm or update the Quantity field, which displays the PO remaining quantity. To receive more or less of an item than indicated on the PO, update the Quantity field.
10. Click the Save Updates button.
11. Click the Complete button in the upper or lower right-hand corner of the page.

   ![Screenshot of Receipt Lines with updated Quantity]

12. The Receipt No. is displayed. If you need a printed copy of your receipt for your records, click the printer icon.

   ![Screenshot of Receipt No. display]

   You have successfully created a quantity receipt.

In some cases, a vendor might send multiple shipments to fulfill one PO. For example, an item could be on backorder, or a large order might be shipped in multiple boxes, which could be separated during shipping. Because of this, it is possible to create multiple receipts for a single order.