Create a Receipt from a Purchase Item

There are 3 options to Create a Receipt (or Receiver of a Good or Service):
Receipt can be accessed directly by typing the Create Receipt task in the search box, or from your Inbox, or by using the Purchase Order Related Actions icon: select - Receipt – Create

All POs in Workday must be received except for Office Supply Punchout Orders, and Subcontracts administered as a supplier contract.

Option 1:
1. Type Create Receipt in the search box.

Option 2:
2. From your Inbox, go to the Actions tab and select Create Receipt for Purchase Order. Make sure you select the correct Create Receipt based on the Supplier Invoice and PO number.
   a. From your Inbox, next to For, click the Supplier Invoice to view the PO and Amount (for Services) or Quantity (for Goods).
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b. The Supplier Invoice will display. Note the **PO** and **Amount/Quantity**.

c. Go back to your **Inbox**, select the **Action**, and click **Create Receipt**.
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**Option 3:**

3. To use the **Purchase Order Related Actions** icon, click the **My Requisitions Worklet** or type **My Requisitions** in the search box.
   
a. Under Purchase Order, type the PO or use the **Prompt** to find the PO.
   
b. Click **OK**.
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c. Click the **Related Actions** icon.

d. Under **Available Actions**, on the left side, hover over **Receipt**.

e. Click **Create**
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NOTE: For all 3 options, please submit the Supplier Invoice to accounts payable@fau.edu

Using Option 1, Option 2, or Option 3, continue with Step 4.

4. Under Create Receipt:
   a. Click Purchase Order and type the PO number or search for the PO using the Prompt. Make sure to type PO- before typing the PO number.
   b. You can also click Purchase Order and type the Supplier Name. When the drop-down menu appears, select the PO.
   c. Click OK to continue.
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5. Under the **Goods Lines** tab or **Services Lines** tab, verify PO information including Quantity Ordered, Quantity Received, and Quantity Received to Date for Goods Lines, or Amount to Receive for Service Lines.
   
a. Type in Quantity or Amount to Receive for each line item.

   **Note:** The total quantity or amount received cannot exceed the amount on the PO. If additional items or dollars need to be received then a Change Order to the PO is required.

   **c. Note:** Once a PO is completely received (Quantity or Dollars) the PO will automatically close. Once closed, it cannot be reopened unless the Receipt is Edited prior to the invoice payment. After invoice payment, the PO and Receipt are closed.
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6. Click on the **Attachments** tab.
   
a. All Receipts require an attachment. Upload documents for proof of receipt.
   
b. If you do NOT have a receipt for goods or services that need a receipt (such as a renewal), attach a packing slip, quote for services rendered, or a document that states the goods arrived or the services were rendered.

7. Click **Submit** to continue.
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8. The **Process Successfully Completed** page will display.
   a. If anything is needed, a message will appear for you to edit your receipt.

9. Click **Done** when finished.

   You have submitted RECEIVE-000000175 for PO-P1600009 ...