

Purpose & Profiles

This job aid covers the process for creating a new receipt in OhioBuys.

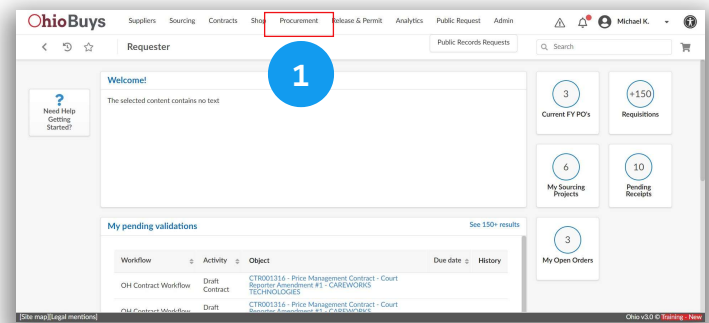
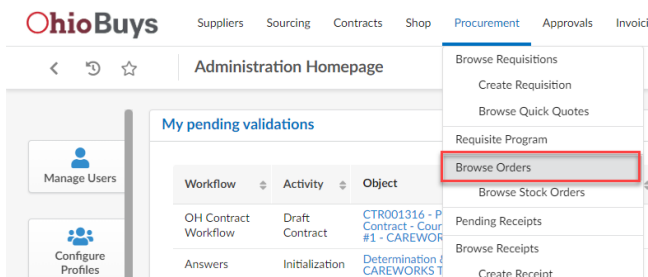
Profiles: Requesters, Requisitioners, Central Receivers

Used When

Reference this when creating a new receipt for a purchase order in OhioBuys.

Requester: Ohio

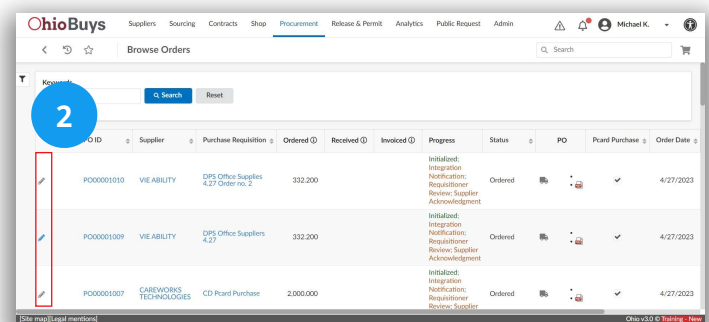
1. From the homepage, click on **Procurement** in the Main Menu Navigation Bar and select **Browse Orders** from the drop-down menu..



Open Purchase Order

2. From the Browse Orders page, locate the purchase order that you would like to create a receipt for and click the **Pencil** icon to open it.

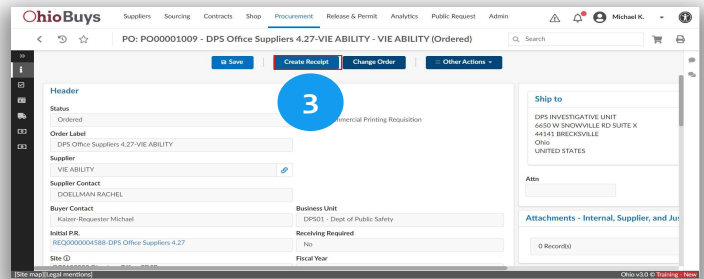
Pencil Icon



If you have questions or need additional assistance, please contact the OBM Contact Center via email (OBM.ContactCenter@obm.ohio.gov) or phone (877-644-6771).

Create Receipt

3. On the Purchase Order page, click **Create Receipt**.



Receipt Header Information

Header

Status

Label

Delivery Reference ID # ①

Delivery date ①*

Receiver's Site Location*

Comments

Supplier*

Order

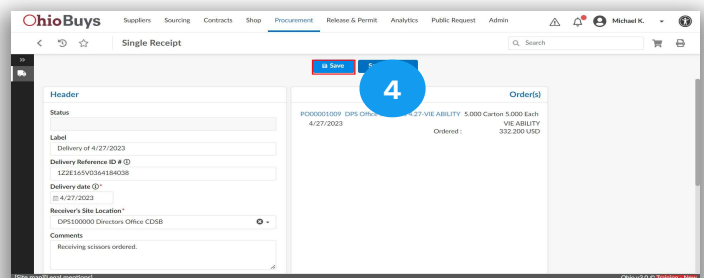
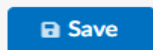
Users should review the pre-populated fields on the receipt header (i.e., **Label**, **Delivery Date**, **Receiver's Site Location**, **Supplier**, **Order**) for accuracy and edit them as necessary. These fields are automatically populated based on information from the associated purchase order and the day the receipt was created.

In addition to editing the pre-populated fields, users should add:

- **Delivery Reference ID #:** The packing slip number and/or bill of lading.
- **Comments**

Save


4. After completing the header information on the receipt, click **Save**.

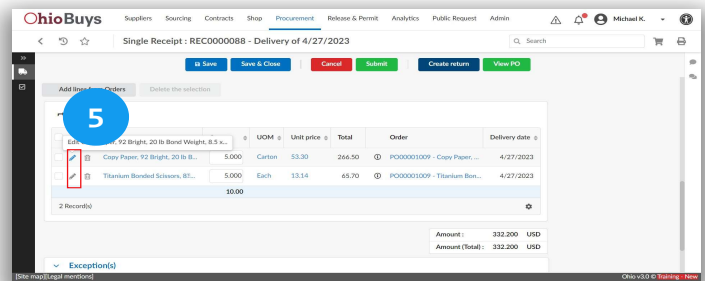


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Receipt Line Items

5. The receipt header information has now populated, and the individual line items associated with the purchase order become visible at the bottom of the page. Scroll down and click the **Pencil** icon next to the applicable line item(s) to validate receiving the item(s).

	Name	Qty	UOM	Unit price	Total	Order	Delivery date
	Copy Paper, 92 Bright, 20 lb B...	5.000	Carton	53.30	266.50	PO00001009 - Copy Paper, ...	4/27/2023
	Titanium Bonded Scissors, 8 1/2"	5.000	Each	13.14	65.70	PO00001009 - Titanium Bon...	4/27/2023
		10.00					
2 Record(s)							



Edit Delivery Item

Edit delivery item

Save **Save & Close** **Close** **Save & New**

Name
Copy Paper, 92 Bright, 20 lb Bond ... [Copy Paper, 92 Bright, 20 lb Bond Weight, 8.5 x 11](#)

Commodity
14111507 - Printer or copier paper

Order
PO00001009 - DPS Office Suppliers 4.27-VIE ABILITY

Quantity Received
① 0.000 * Carton

Price
53.30 USD 53.30 USD

In the Edit Delivery Item pop-up box, complete the following:

- Review the pre-populated fields (i.e., the Name of the line item, the type of Commodity, and the Order number) for accuracy and edit them as necessary.
- Review the **Quantity Received** or **Amount Received** (i.e., the automatically populated amount associated with the original purchase order).
 - If you only received a part of the original purchase order quantity, change this quantity as applicable and then click **Save & Close**. (e.g., in the above example, the user only received the scissors and not the copy paper, so the Quantity Received field was updated to 0 for the copy paper line item)
 - If you received the total purchase order quantity, click **Save & Close**.
- If there are multiple line items, complete this process for each line item.

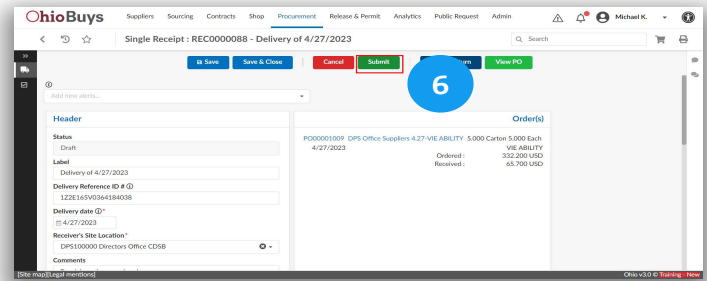
▲ Note

- Receiving is done by quantity or dollar amount, depending on how the PR was created. If receiving by dollar amount, the receipt will need to be entered in OAKS.
- Line items are automatically populated to receive the total amount of the PO.

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Submit

6. Click **Submit** to create the receipt.

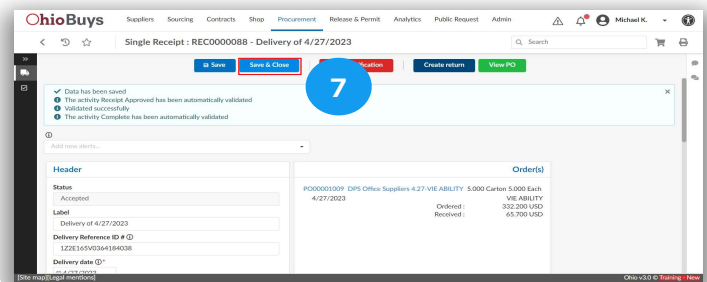
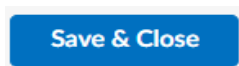


▲ Note



- If a Requester or a Requisitioner creates the receipt, the receipt is automatically saved and approved.
- If a Central Receiver creates the receipt, the receipt is sent to the Requester to validate and approve.

Save & Close

7. Click **Save & Close** to exit the receipt.



▲ Note

- Once you close a receipt, you are directed to the Browse Receipts page with a listing of your created receipts.
- If you want to view a receipt's status or make any necessary changes, click the **Pencil** () icon next to the associated receipt.
- If you want to delete a created receipt, click the **Trash Can** () icon next to the receipt.

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