Receiving in AggieBuy

- Documenting Receipt of Goods and Uploading Packing Slips
Receiving in AggieBuy

- **Optional**, but is a great way to ensure that you have a complete record, from purchasing to payment to **receipt**

- One AggieBuy Receiving document per packing slip/receipt is recommended

- Some funding sources require receipt documentation to be kept on file for a specified # of years; uploading packing slips in AggieBuy is an easy way to ensure that receipt documentation can be easily accessed

- **Any** AggieBuy user can create a receiving document/upload a packing slip in AggieBuy; it does NOT have to be the person who created the original Requisition
Receiving in AggieBuy (Capital Assets)

- At this time, receipt of any **Capital Asset Purchases** in AggieBuy must be done in the **Kuali Financial System (KFS)** on the **Line Item Receiving** document (**Required**)

- You can also complete a Receiving document in AggieBuy for Capital Asset Purchases if you wish, but **it won’t satisfy the KFS Line Item Receiving requirement**

- We’re working to improve the Receiving process for Capital Assets in AggieBuy in the future; thanks for your patience.
Locate the Purchase Order First…

If you created the initial Requisition, use the “My Purchase Orders” link in the Document Search section to locate the corresponding Purchase Order.
Locate the Purchase Order First…

Or…click on “Advanced Search” link to access POs using variety of search criteria
Locate the Purchase Order First…

Select “Purchase Orders” from drop-down menu and enter the name of the person for whom you want to locate POs, and click on **Search** button:
**Locate the Purchase Order First…**

Locate the PO for which you want to create a Receiving document and click on the corresponding PO Number.

<table>
<thead>
<tr>
<th>PO No</th>
<th>Supplier</th>
<th>Creation Date/Time</th>
<th>Requisition No.</th>
<th>Requisitioner</th>
<th>Supplier Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCDAB001562T</td>
<td>Agilent Technologies</td>
<td>3/26/2018 9:02 AM</td>
<td>2199291</td>
<td>Matthew Czamowski</td>
<td>Sent</td>
</tr>
<tr>
<td>UCDAB001560T</td>
<td>Office Depot</td>
<td>3/20/2018 12:49 PM</td>
<td>2143243</td>
<td>Matthew Czamowski</td>
<td>Sent</td>
</tr>
<tr>
<td>UCDAB001517T</td>
<td>National Gift Card Corp</td>
<td>1/10/2018 2:34 PM</td>
<td>2120610</td>
<td>Matthew Czamowski</td>
<td>Sent</td>
</tr>
<tr>
<td>UCDAB001516T</td>
<td>HD Supply Facilities</td>
<td>1/10/2018 2:32 PM</td>
<td>2120628</td>
<td>Matthew Czamowski</td>
<td>Sent</td>
</tr>
</tbody>
</table>
Go to the Document Actions Menu

Under the **Document Actions** menu, select **Create Receipt**
Complete the Header Information

- **Receipt Name** can be used to give the receipt a special “name” that can be used to search for it later; for example, “Matt Office Depot Order 4-23-18”
Complete the Header Information

- Receipt Date, Packing Slip No., Carrier are all important pieces of information to include.

- To upload a packing slip, click on the Attach/Link button.
Complete the Line Details

- Enter number indicating **Quantity Received**

- Under **Line Status**, you can also select **Returned** or **Cancelled**, as appropriate to your specific situation
Complete the Line Details

- **Remove Line** button can be used to remove a line that is not included on that particular packing slip/receipt.

- Clicking on **Receive & Return** button creates a new line for returned item; in other words, it documents receipt and then return of an item.
Receiving Document Action Buttons

- **Delete** button is used to delete a receiving document created in error
- **Add PO** is used to create a receipt for a different PO
- **Save Updates** allows you to save changes for a document in progress
- **Complete** should be clicked once you have completed the Receiving document
Locating Receipts in AggieBuy

- Advanced Document Search screen allows searches by Receipts (drop-down menu)
Locating Receipts in AggieBuy

- Search results include Receipt Number (system-assigned), Supplier Name, PO #, and Packing Slip Number.
Locating Receipts in AggieBuy

• When viewing a Purchase Order, click on the Receipts link on the left menu to see any accompanying Receiving documents completed against that Purchase Order.
Need Additional Help?

• AggieBuy Help Desk: ab-help@ucdavis.edu

• UC Davis Procurement Website: http://procurement.ucdavis.edu