ERP Job Aid
RI Enterprise Resource Planning

Contents

Create Receipt

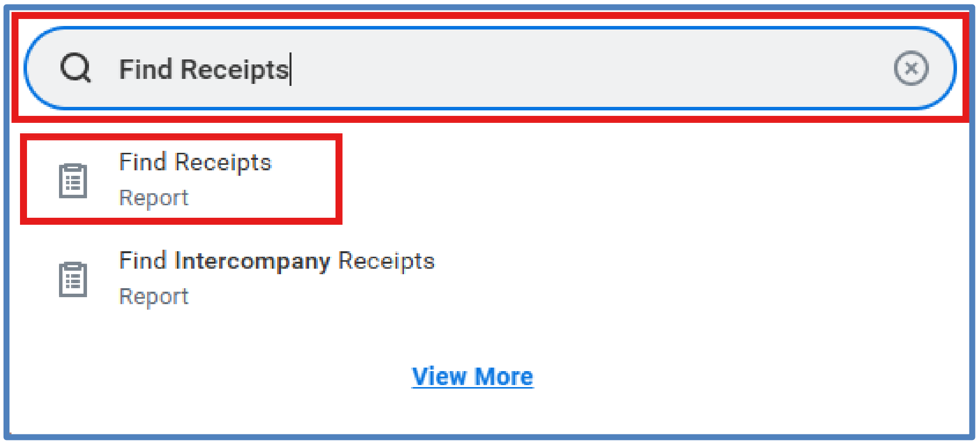
1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
   (**Note**: *If the 'Requisitions' app is not listed in your* ***Menu****, select* ***(+) Add*** *> type 'Requisitions' in the* ***Find Apps*** *field > select the plus-sign > select* ***Back to Menu****.)*
3. Select the Ordered icon and then select the Purchase Order Number.
4. Using the related actions button next to the Purchase Order Number, hover over Receipt and select Create.
5. To **Fully Receive**, check the **Fully Receive** checkbox.
6. Select **OK**.
7. Review the **Goods Lines or Service Lines** by selecting an item from the left panel.
8. Once ready to create a **Receipt**, select **Submit**.

Create Receipt Adjustment

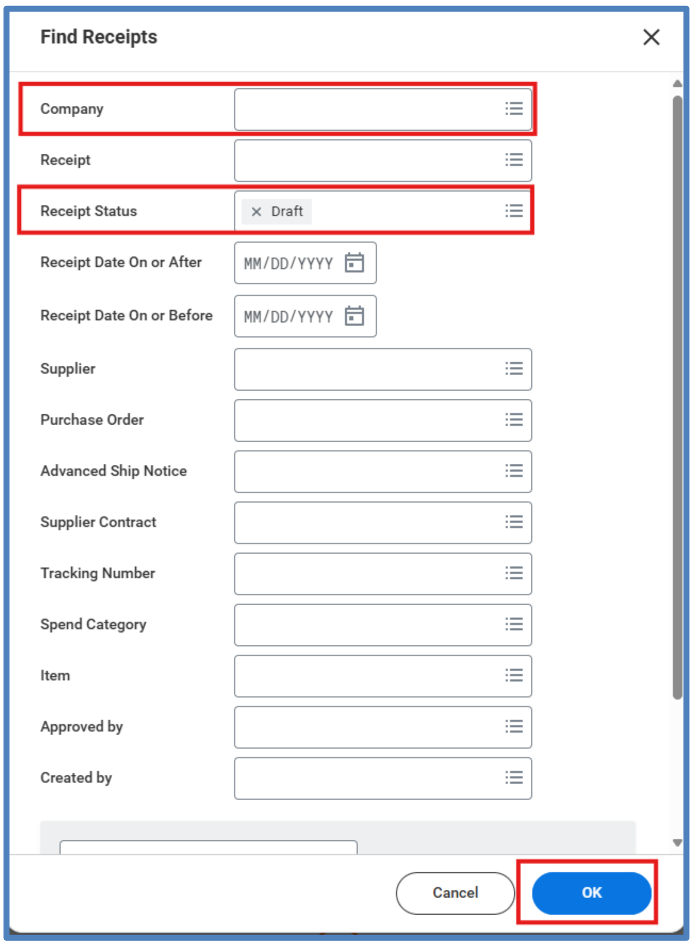
1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
   (**Note**: *If the 'Requisitions' app is not listed in your **Menu**, select **(+) Add** > type 'Requisitions' in the **Find Apps** field > select the plus-sign > select **Back to Menu**.)*
3. Select the Ordered icon and then select the Purchase Order Number.
4. Right click on the PO number and select copy text.
5. In ERP system search bar, type in *Create Receipt Adjustment* and then select the **Create Receipt Adjustment** task.
6. To select a **Receipt to Adjust**, select the menu icon, select **Receipt by PO**, and then paste your PO number.
7. Select **OK**.
8. Review the **Line Information**.
9. From the left panel, select a **Goods Line** item or a **Service Line** item, and then make an adjustment.
10. Once an adjustment is made, select **Submit**.

Managing Draft Receipts

1. In the ERP system search bar, type in **Find Receipts** and select the report.



2. Enter Company name and change the **Receipt Status** field to **Draft**. Select **OK**.



3. Select the related actions (...) next to the receipt you want to cancel.
4. Hover over Receipt and select **Cancel**.
   (**Note**: *Only receipts in draft status can be cancelled.)*