For purchase orders that require posting/creating of receipts.

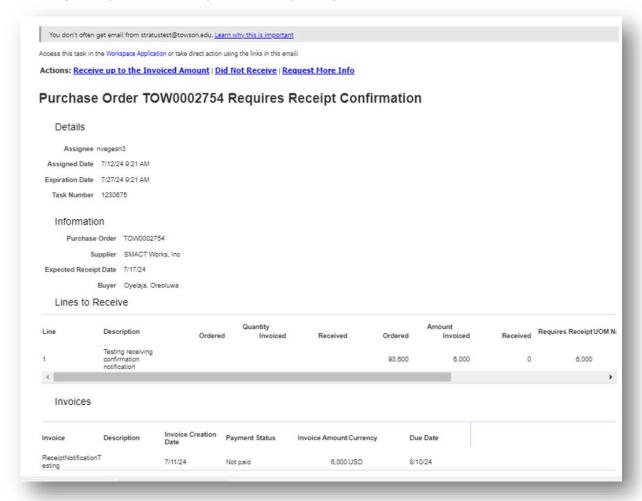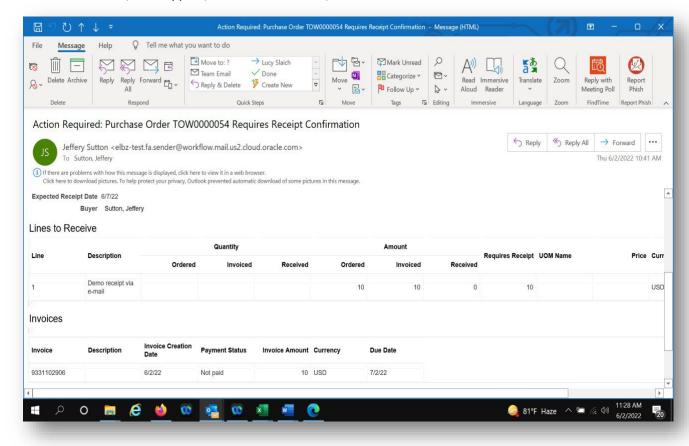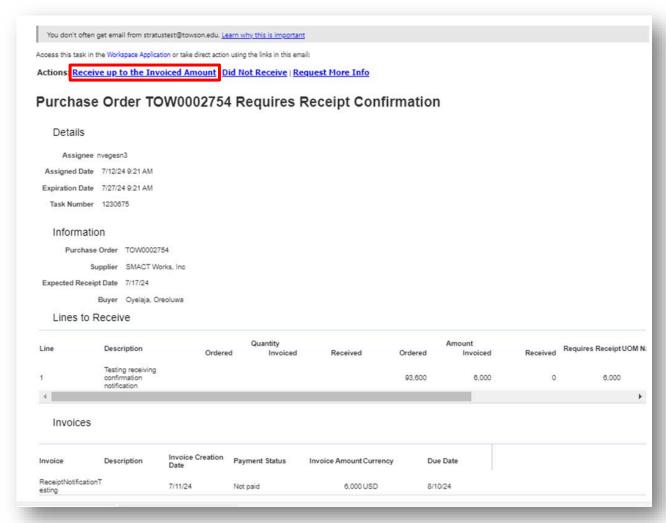|	
Purpose:	Post/create a receipt.
How to Access:	Navigate to the corresponding email.
Helpful Hints:	Be sure to keep in mind that…
	• Reference the appendices at the end of this document for instructions on posting/creating a receipt using the notification bell in Stratus and from "My Receipts" in Stratus
	• The ability to include comments and attachments is only available in the Receiving Module.
Procedure:	Complete the following steps to post/create a receipt:

1. Navigate to your inbox and open the corresponding email.

2. As you scroll down, you can see additional information about the transaction, including the purchase order number and amount, the supplier, the invoice number, and the amount invoiced.
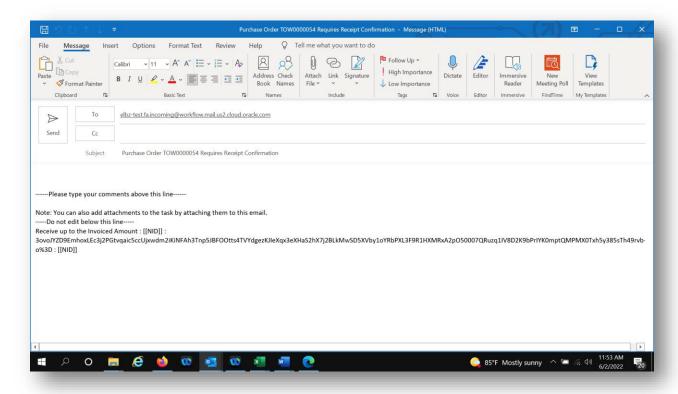
3. At the top of the email, the possible actions are listed: **Receive up to the Invoiced Amount, Did Not Receive, and Request More Info**.

4. Select **Receive up to the Invoiced Amount** to complete this task for a single invoice. Selecting **Did Not Receive** routes the task to the buyer for action. Selecting **Request More Info** routes the task to the requester for a response. (Note: For this example, we will select Receive up to the Invoiced Amount. The system will then return the below screen, click send to complete the task.)
Please be sure not to receive only the amount of the invoice if all goods and services have been received.
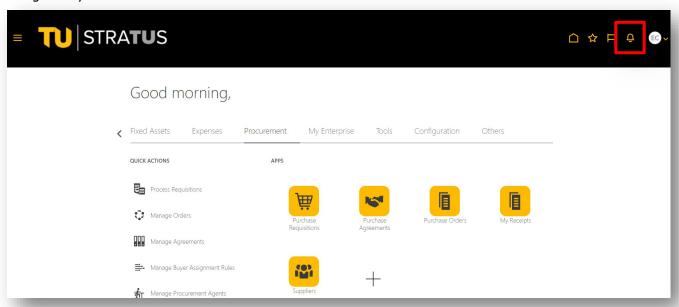
NOTE: Once a notification is sent, it is up to the requester to act on it manually. Notifications by default have an expiration date of one week, after which the notification escalates to the line manager of the requester. After one week of escalation, the notification expires.
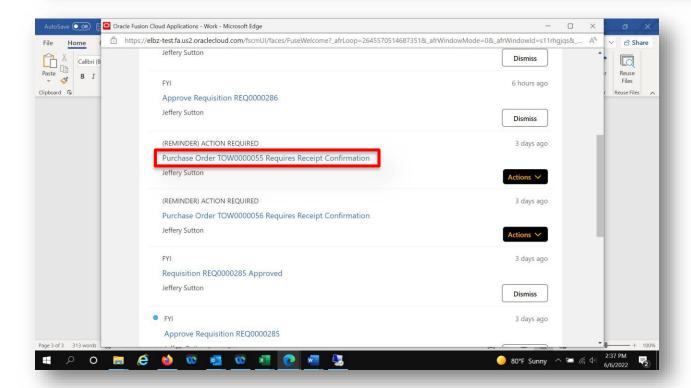
Once a notification expires, the purchase order becomes eligible for the Confirm Receipts workflow again. If it is still not received, the requester is sent another notification.

Appendix A – Post/Create a Receipt using the Notification Bell
This section will show how to post/create a receipt using the notification bell in Stratus.

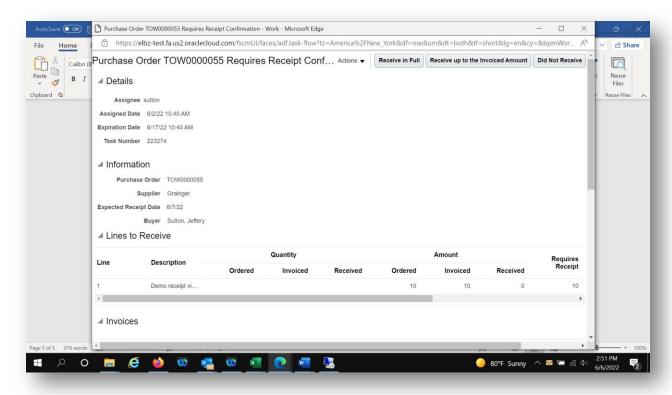1. Navigate to your home screen and click on the notification bell.

2. You will see the purchase order number followed by "Requires Receipt Confirmation".

3. Selecting the Actions button will show the actions you can take: Receive up to the Invoiced Amount, and Do Not Receive. Selecting one of those actions will complete the task. (Note: For this example, we will click on the blue link for "Purchase Order TOW0000055".)

4. The system will return a summary of the purchase order and the invoice along with the same action

dropdown options.

NOTE: The actions listed under this Actions drop down are unique to the notification bell page (some of these actions are not included in the email notification).

Request Information – Ask the task creator for more information.

Delegate – Pass the task to someone else to act for you, but the task is still assigned to you.

Renew – Give yourself more time (seven days is the default) to act on the task if the task is about to expire.

Suspend - ***Not Recommended*** - Put the task on hold until it is resumed. In the meantime, no one is assigned to act on it.

Withdraw - ***Not Recommended*** - Remove the task from the workflow (available only if you created the task).

Save - ***Not Recommended*** - Saves the task with no action

Appendix B – Posting/Creating a Receipt using "My Receipts" in Stratus

This section will show how to post/create a receipt using the My Receipts tab in Stratus.

1) Navigate to the Procurement tab and select My Receipts

2) Next remove your name from the Requester box. Then select Any time from the Items Due drop-down.

3) Type in the Purchase Order number and click search.

4) Click on Receive.

Receive Items ⓘ

▶ Search

Search Results

View ▼ Format ▼ ⊞ ⬚ Freeze ⬚ Detach ⬚ Wrap [Receive]

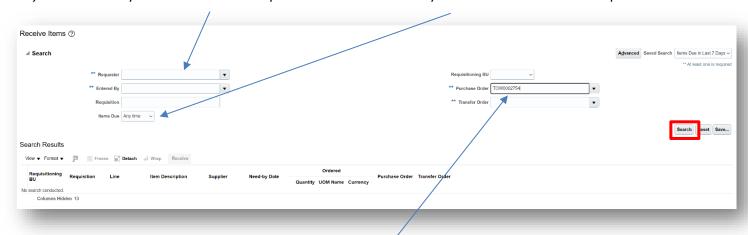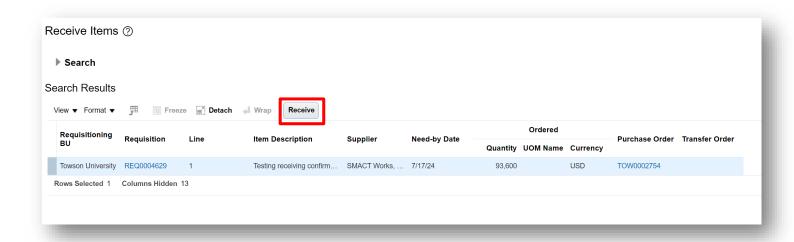| Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered			Purchase Order	Transfer Order
						Quantity	UOM Name	Currency		
Towson University	REQ0004629	1	Testing receiving confirm…	SMACT Works, …	7/17/24	93,600		USD	TOW0002754	

Rows Selected 1   Columns Hidden 13

5) Adjust the amount you want to receive if necessary, then click Submit. Be sure to only receive the amount of the invoice if all goods/and or services have actually been received.

Create Receipts ⓘ   [Submit] [Cancel]

Actions ▼ View ▼ Format ▼ ✎ ⊞ ⬚ Freeze ⬚ Detach ⬚ Wrap Remove Line Show Receipt Quantity

Requisition	Item Description	Receipt			* Transaction Date	Waybill	Packing Slip	Requisitioning BU	Purchase Order	Transfer Order
		* Quantity	UOM Name	Currency						
REQ0004629	Testing receiving confi…	77,600		USD	8/21/24 10:			Towson University	TOW0002754	

Columns Hidden 16