How to Create a Receipt

1. Open the **Purchases** app. In the **Actions** section, select **Create Receipt**.
2. In the **Document Number** field, select a purchase order.

   POs are listed by most recent and by supplier. You can also type a PO number into the field and hit Enter to populate it directly. (Note that you must type the entire number, e.g. PO-10009999.)

   If you can't find the PO you need, check its status – receipts can only be created against open POs with no change orders in progress.
3. To pay the entire PO, check the **Fully Receive** box. To partially pay, leave that box unchecked. Then **click OK** to start creating your receipt.

   You can ignore the Tracking Number field – it's not necessary.
4. In the **Create Receipt** screen, you must enter a **Quantity to Receive** and attach your **Invoice** on every line item.

   If you checked the **Fully Receive** box, the Quantity to Receive is entered for you, so you can skip that step. If you left it unchecked, you must enter a quantity for each line item received. However, you must attach an invoice to each line item you're receiving, or Workday will not let you proceed.
5. When all applicable line items are received and documents attached, click **Submit**. You can also **Save for Later** or **Cancel** if needed.

Notes

- **The quantity to receive corresponds to the quantity ordered.** For example, if you ordered 1 case of paper (10 reams) for $40, the quantity to receive is 1, not 10 or 40. You received the one unit you ordered. Receipts are frequently rejected because the dollar amount was entered instead of the quantity received.
- **Need to make changes?** You can edit or cancel a receipt using the **Related Actions** menu (three dots) next to the REC number.
  - Only use the edit function if you need to attach a document. If you need to change the receipt itself, you must **cancel it and start over**.
  - **If the PO has been changed** in any way after you created your receipt, you must cancel it and create a new one. The old receipt will always pull data from the original PO, whereas a new one will pull from the updated purchase order.