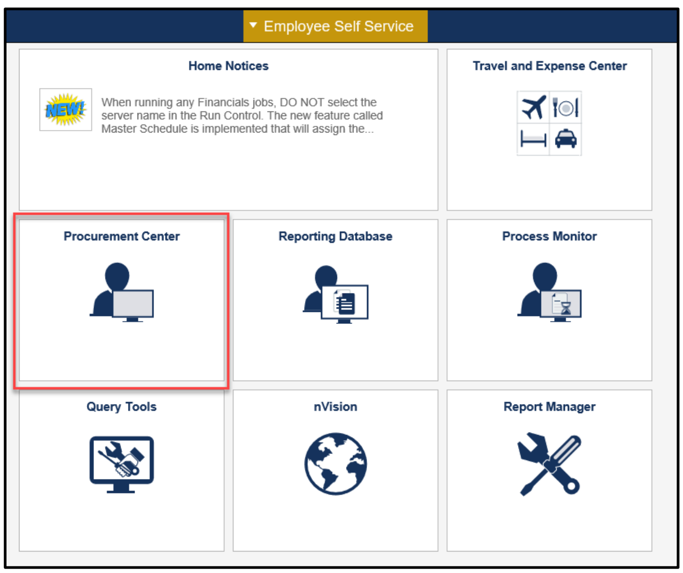
PantherSoft Financials Receiving Job Aid
- The Casual Receiver (Access Role 002A) -

A Receipt must be created in PantherSoft Financials immediately following the delivery of goods/services. This acknowledges that what was requested via a dispatched Purchase Order was fulfilled by the Supplier. The Receipt is independent of the Supplier's Invoice, which they should send directly to Accounts Payable (AP) per instructions on the Purchase Order.

After the Receipt is created by a requester against a dispatched Purchase Order and an invoice is received by AP, a payment will be sent to the Supplier. If a Receipt is not entered and/or an invoice not received, the Supplier will not be paid – even if the goods/services were provided.

The following steps provide instructions on how the **Casual Receiver** creates a Receipt for Requisitions created only by themselves.

1. From the **Employee Self Service** homepage, click the **Procurement Center** Tile.



2. Click the **ePro Receiving** Tile.

Office of the Controller
Financial Systems and Support Services
305-348-7200 (7-7200)
controller@fiu.edu
http://finance.fiu.edu/controller

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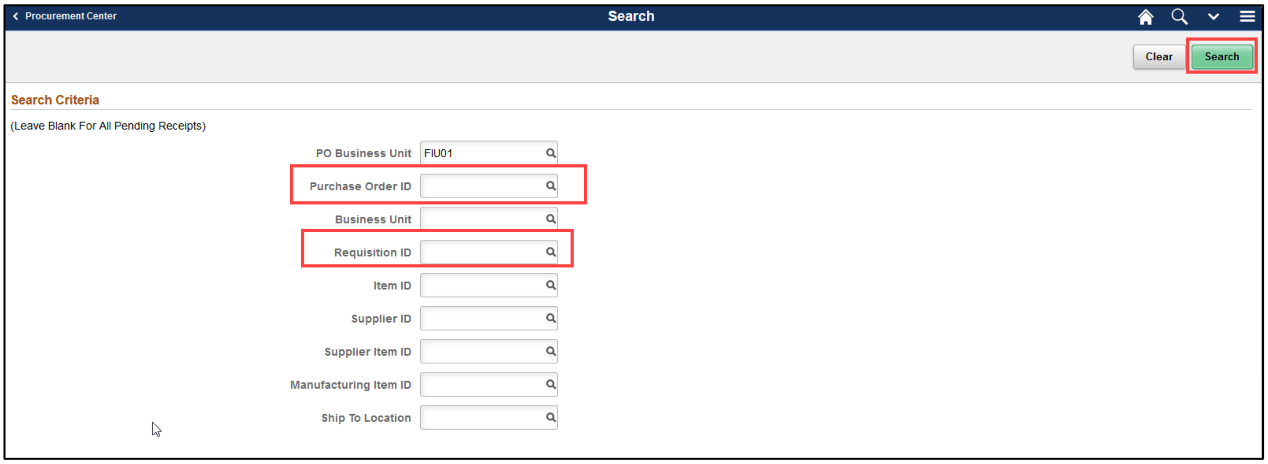
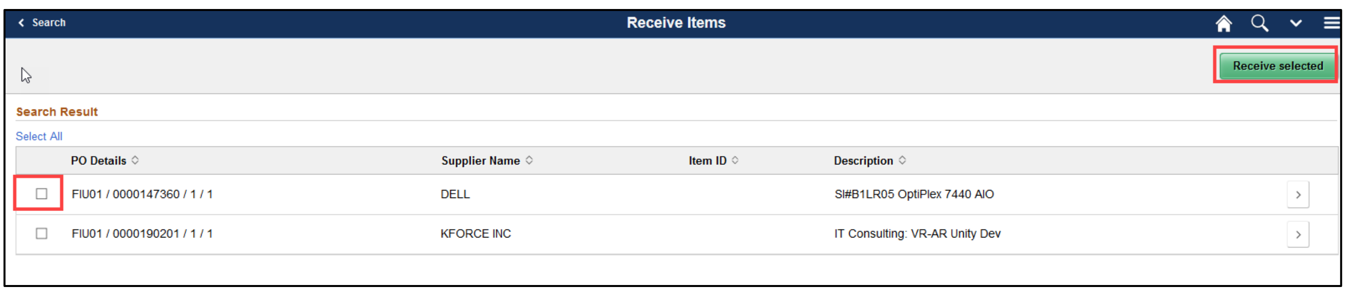
3. The **Search Criteria** page will appear. Enter the Purchase Order ID or Requisition ID and click **Search.** Alternatively, just click **Search** (only open lines to receive will appear).

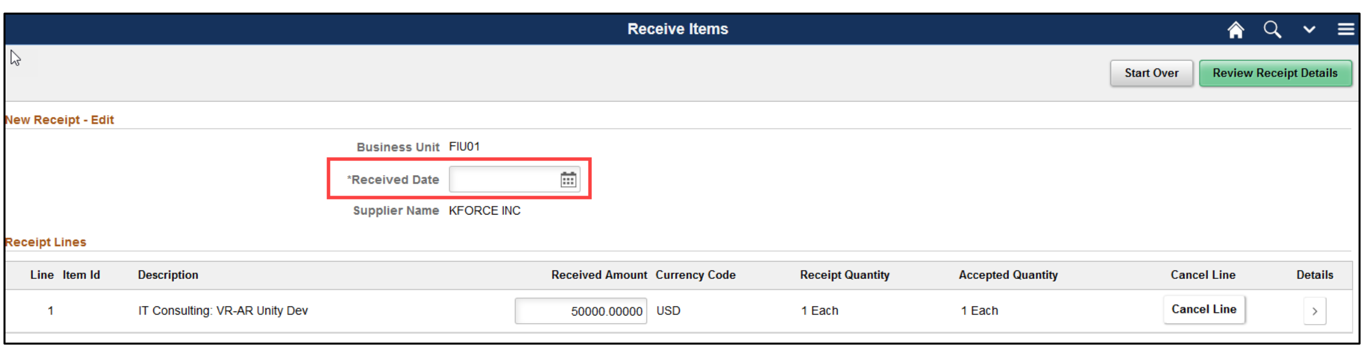


NOTE: Purchase Order ID's can be obtained through the **Manage Requisition** Tile. Click on the Purchase Order graphic in the Requisition Lifespan to get the ID.

4. Select the checkbox next to the lines that are open to receive. Click **Receive selected.**



5. Enter the date that the good/service was actually received in the **Received Date** field. The Receipt Date must be the date the product was physically received or when the service was rendered – not the date that the receiving entry is made. <u>This is a mandatory field</u>.



NOTE: The Receipt Date must be within 60 days from the current date.

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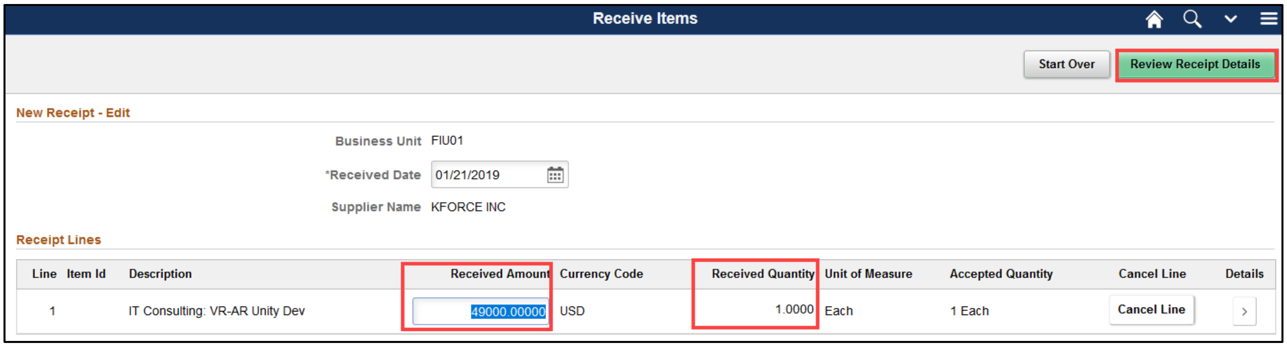
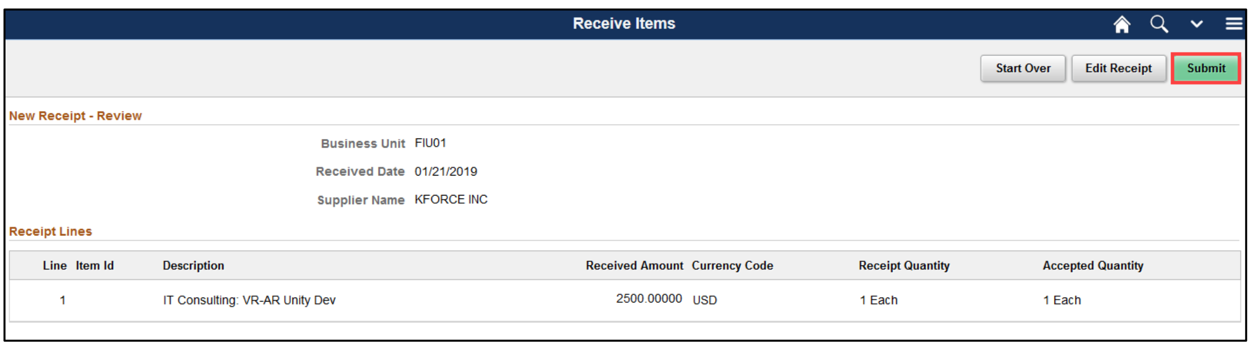
6. Enter/Confirm the quantity or amount of the goods/services that are being received in either the **Received Amount** or **Received Quantity** field (this depends on whether the requisition was setup to be received by quantity or amount). Click **Review Receipt Details.**



7. Review information on the receipt. Once complete, click **Submit.** Users also have the option to **Start Over** or go back and **Edit Receipt.**



8. A confirmation screen appears with a Receipt ID number.