

How a PI Creates a Fully Received Receipt

Please create a receipt when goods or services have been received against a purchase order

1. Log in to Workday using your **ID** and **Password**.
2. In the search bar, type in **Create Receipt** ❶ and click on **Create Receipt** ❷.

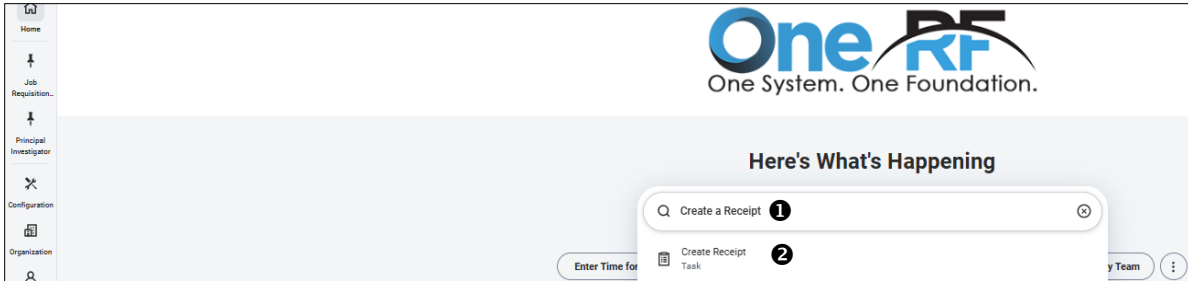


Figure 1

3. After you enter **Create a Receipt** and click in the search space, then click on **Create a Receipt**, and the **Create a Receipt** pop-up box will appear as shown in **Figure 2**, below. Check the **Fully Received Box** ❶. Then click on the drop-down menu ❷ and you will have two choices to select **Most Recent Documents** or **POs in last 24 months by Supplier** as shown in **Figure 3** below ❸. We are choosing **Most Recent Documents** ❹. Another pop-up box will open as shown in **Figure 4** and select your PO order ❶ for the receipt you are creating. Then click **Ok** ❷ as shown in **Figure 3** below. The **Create Receipt** screen will appear as shown in **Figure 5**, on **Page 2** with the details outlined in **Figure 6**, on **Page 3**.

The 'Create Receipt' pop-up box is shown. It has a title bar with a bookmark icon and a close button. Inside, there are three input fields: 'Document Number' with a red asterisk and a drop-down arrow (labeled ❷), 'Fully Receive' with a checkbox (labeled ❶), and 'Tracking Number' with a drop-down arrow. At the bottom, there are 'Cancel' and 'OK' buttons.

Figure 2

The 'Create Receipt' pop-up box is shown with the 'Fully Receive' dropdown menu open. The menu has two options: 'Most Recent Documents' (labeled ❷) and 'POs in last 24 months by Supplier'. A bracket labeled ❸ indicates the selection area. The 'OK' button is labeled with a circled 3.

Figure 3

The search results for 'Most Recent Documents' are shown. The list includes two items: 'PO-0000300 (QUILL LLC)' (labeled ❶) and 'PO-0000296 (CDW LLC dba CDW, GOVT AND EDUCATIONAL SALES)'. Each item has a radio button and a three-dot menu icon.

Figure 4

Create Receipt

RCPT-0000072 for PO-0000300

Purchase Orders

Supplier

Status

Total Amount

Currency

PO-0000300

QUILL LLC

Draft

\$0.00

USD

Information

6

Attachments

Lines

1

1 Error

1 Item

Search

Goods Lines

2 Rubbing Alcohol

0/2

7437934207

Each

Line Information

Item Description

2 Rubbing Alcohol

PO Line

PO-0000300 - Line 1

Quantity to Receive

2

0

Unit of Measure

Each

Fully Receive

3

☐

Quantity Ordered

4

2

Ordered Quantity Invoiced

0

Total Quantity Already Received

0

Supplier Item Identifier

7437934207

Memo

5

Additional Information

Company

RFCUNY Research Foundation of the City University of New York

Commodity Code

(empty)

Spend Category

6220 - Research Supplies

Unit Cost

100.00

Extended Amount

0.00

Ship-To Address

160 Convent Avenue New York, NY 10031 United States of America

Ship-To Contact

Luis Jones [C]

Worktags

Admin Fee Type Code: ADMIN FEE-STANDARD RATE

Cost Center: CC The CITY COLLEGE of NEW YORK

Department: 10037 Biomedical Engineering

Fund: GC Grants and Contracts

Grant: GR-10000001 Expense Reports Test

More (3)

Attachments

Drop files here

or

Select files

PLEASE NOT: DO NOT USE THIS ATTACHMENT BOX TO ATTACH PROOF. GOTO NUMBER 6 ON THIS PAGE AND CLICK THAT ATTACHMENT TAB

enter your comment

7

Submit

Save for Later

Cancel

Figure 5

4. After clicking **Ok**, ③ as shown in **Figure 3, Page 1**, the **Create Receipt** screen will appear as shown in **Figure 5**, on **Page 2** and the following is what you must complete to continue the process. First, let's address the **Error in Red ①**. We click on the **Error in Red ①**, the error message will appear as shown in **Figure 6** below. We need to attach proof of receipt, which we will be doing in this step.

After we attach the proof, the error will go away. We need to enter the **Quantity to Receive ②** field in **Figure 5**, on **Page 2**. When we enter **two** in the **Quantity to Receive** field, the **Fully Received Box ⑤** will auto-populate with a check mark because it equals the **Quantity Ordered ④**. In the **Memo ⑥** field, enter any information you deem necessary. Now **Select Attachments ⑦**. The **Attachment Screen** will open as shown in **Figure 7** below. Click on **Edit ①**. A new attachment window will open as shown in **Figure 8, on Page 4**. Click on the drop-down menu  ① and select the Attachment Category from the list and enter additional information in the **Memo Box ②**. Then click **Submit ⑦** as shown in **Figure 5**, on **Page 2**.

Please Note: PO with multiple Lines: When a PO includes multiple lines, you must indicate the quantity received for each line.

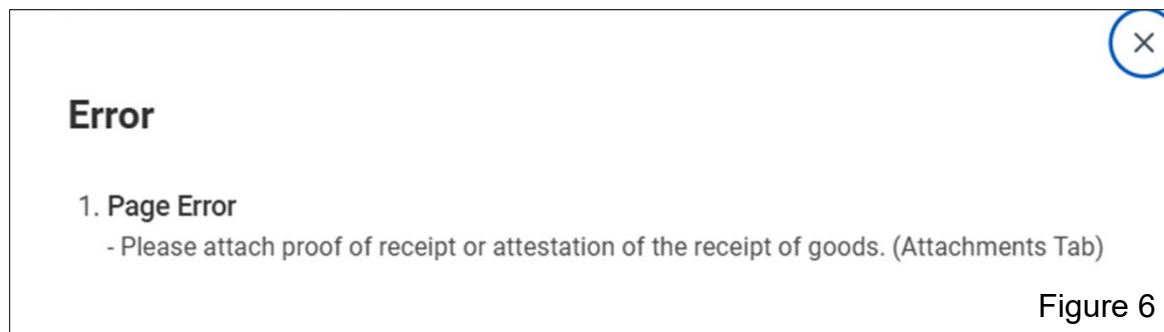


Figure 6



Figure 7

5. After clicking on **Edit ❶** in **Figure 7**, on **Page 3**, the new attachment window will open as shown in **Figure 8** below.

Click on **Select Files ❶** and attach your document(s) that are proof or attestation of the receipt of goods from your files. After you upload your file(s), an **Attachment** pop-up box will appear, as shown in **Figure 9**, on **Page 6**.

Create Receipt RCPT-0000072 for PO-0000300 ... 01/10/21

Purchase Orders: PO-0000300 Supplier: QUILL LLC Status: Draft Total Amount: \$100.00 Currency: USD

Information **Attachments** Lines

Attachments

Drop files here

or

Select files ❶

Save Cancel

enter your comment

Submit Save for Later Cancel

1 Error

Figure 8

- After you upload your file(s), an **Attachment** pop-up box will appear, as shown in **Figure 9**, below. Click on the drop-down menu **1** and select the **Attachment Category 2** from the list and enter additional information in the **Memo Box 3**. Click **Upload 4** if you want to attach another document. Then click **Save 5**. After you click **Save**, the **Submit Screen** will open as shown in **Figure 10** below. Click **Submit 1**.

Create Receipt RCPT-0000072 for PO-0000300

Purchase Orders: PO-0000300 | Supplier: QUILL LLC | Status: Draft | Total Amount: \$100.00 | Currency: USD

Information | **Attachments** | Lines

Attachments

Containers for First Aid.pdf
✓ Successfully Uploaded!

Attachment Category: [Search] **1**

- ☐ Appendix A - Scope of Work and Deliverables
- ☐ Contractor's Dated Client List or Advertisements
- ☐ Email confirmation verifying that the product has been delivered
- ☐ Invoice
- ☐ Packing Slip
- ☐ Payment Schedule
- ☐ Picture of the products
- ☐ Quote
- ☐ RF-701
- ☐ RF-702
- ☐ Tracking Confirmation

Comment: **3**

4 Upload **5** Save Cancel

enter your comment

Submit Save for Later Cancel

Figure 9

Create Receipt RCPT-0000072 for PO-0000300

Purchase Orders: PO-0000300 | Supplier: QUILL LLC | Status: Draft | Total Amount: \$100.00 | Currency: USD

Information | **Attachments** | Lines

Containers for First Aid.pdf 11/13/2025, Attachment Category: Invoice

Edit

enter your comment

1 **Submit** Save for Later Cancel

Figure 10

7. After clicking **Submit** ❶ in **Figure 10**, on **Page 5** a pop-up box will appear as shown in **Figure 11** below.

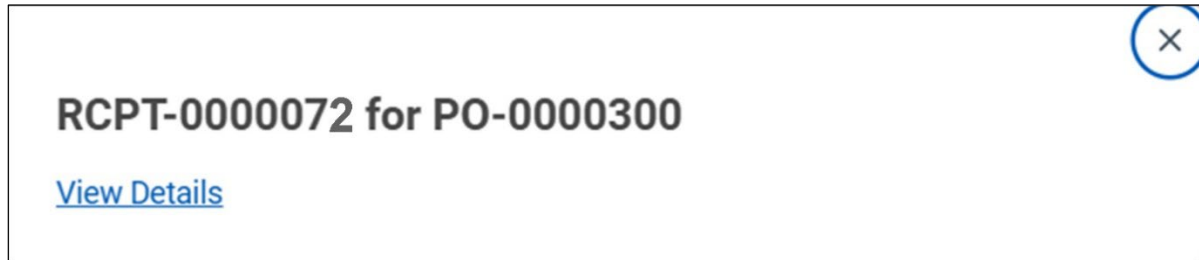


Figure 11