WHY do we need to receive?
- It is your department’s way of indicating the status of all of your goods and/or services for that particular order.
  - Remember indication of appropriate receipt of materials may be part of audit documentation, especially on contracts and grants.
  - In many cases, your receipt is the key for releasing payment on your purchase orders’ invoices.

WHO should receive?
- Your Department Purchasing Administrator (DPA) has selected specific employees to have the role in Gateway of “Receiver”.
- In some departments there are many Receivers that have the ability to receive for their individual orders, while other departments have set up a few Receivers for centralized receiving. Please check in with your department for clarification regarding receiving practices in your department.
- The role of Receiver is the only role with the option to create receipts in the system.

WHEN do we need to receive?
- Best practice is to receive on every single purchase order, for which you have direct knowledge of receipt, in order to indicate that your goods and/or services have been received.
- However, on orders $2,500 and below, a receipt is not needed for the invoice to pay if the invoice and purchase order match.
  - Please note: Bypassing the Receiving step may, however, raise audit issues.
- Receipts are always required to release the invoice to pay on any order over $2,500.
- Receipts are always required to release the invoice to pay Vendor Blankets and Walk-In Forms.
  - Please note that receipts are not necessary to release payment on Arrowhead Water Vendor Blankets. However, it is still best practice to continue creating receipts to maintain audit standards.
- For further details on Gateway’s receiving tolerance’s please visit: http://info.gateway.procurement.ucsb.edu/files/tolerances.pdf

WHAT kind of receipt should I create?
- **Quantity** Receipts are typically used for simple receiving on purchase orders.
  - They are used to reflect the quantity of items ordered on the purchase order and received.
  - Quantity receipts are most often seen with supply orders, like OfficeMax or Fisher Scientific.
- **Cost** Receipts are typically used for receiving the actual amount reflected on an invoice against your purchase order.
  - They are always to be used with Vendor Blankets, Walk-In Forms and Confirming Forms as they need to match the exact amount of the invoice for payment against your purchase order.
WHERE do I create receipts in Gateway?

- You will always create receipts from the Purchase Order, not the Requisition.
- If you have the Receiver role in Gateway, options to create receipts will be in your “Available Actions” drop down menu on the right hand side of the purchase order.

**Quantity Receipts**

- From your “Available Actions” drop down menu, select “Create Quantity Receipt” and hit “Go”.
- When you select this option, the receipt will populate as if you have received all line items for your order. If you received everything perfectly for your order, then leave it as is!
  - **Partial Shipment** - If you did not receive all of your shipment, change the quantity to reflect what you did receive. That will leave the line open for you to receive at a later time on a new receipt. If you are waiting to receive a full line of your order, you can delete the entire line off of your receipt, leaving it open to receive at a later time when your goods arrive.
  - **Returns** – If you received an item and need to return it, select the “Receive & Return” button. It will duplicate your line, showing that you’ve received that quantity of goods and also returning the same. This leaves the line open for receiving again at a later date.
  - **Cancellation** – If you are not going to receive the goods (the supplier does not carry the item anymore, etc), change the “received” drop down to “cancelled”. This ensures that that line item closes as you do not expect a future shipment.
  - For more guidance on partial receiving and cancellations please visit: [http://info.gateway.procurement.ucsb.edu/files/receiving.pdf](http://info.gateway.procurement.ucsb.edu/files/receiving.pdf)