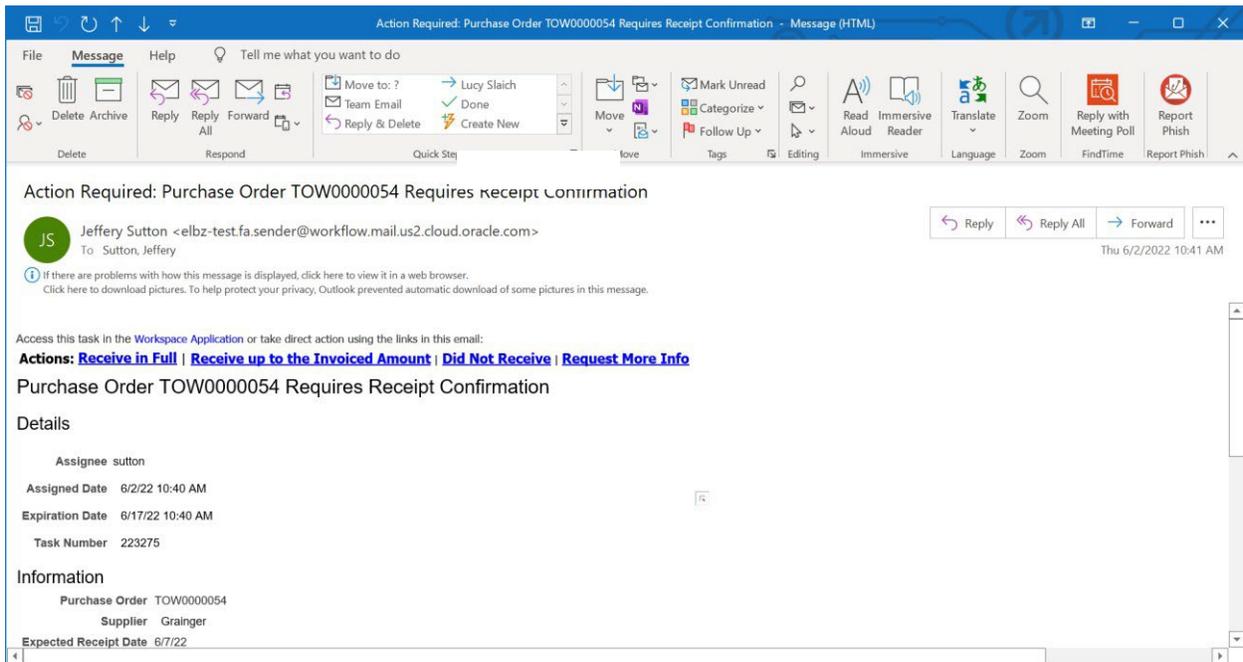


Purchasing – Receiving Confirmation

For purchase orders that require receipt confirmation.

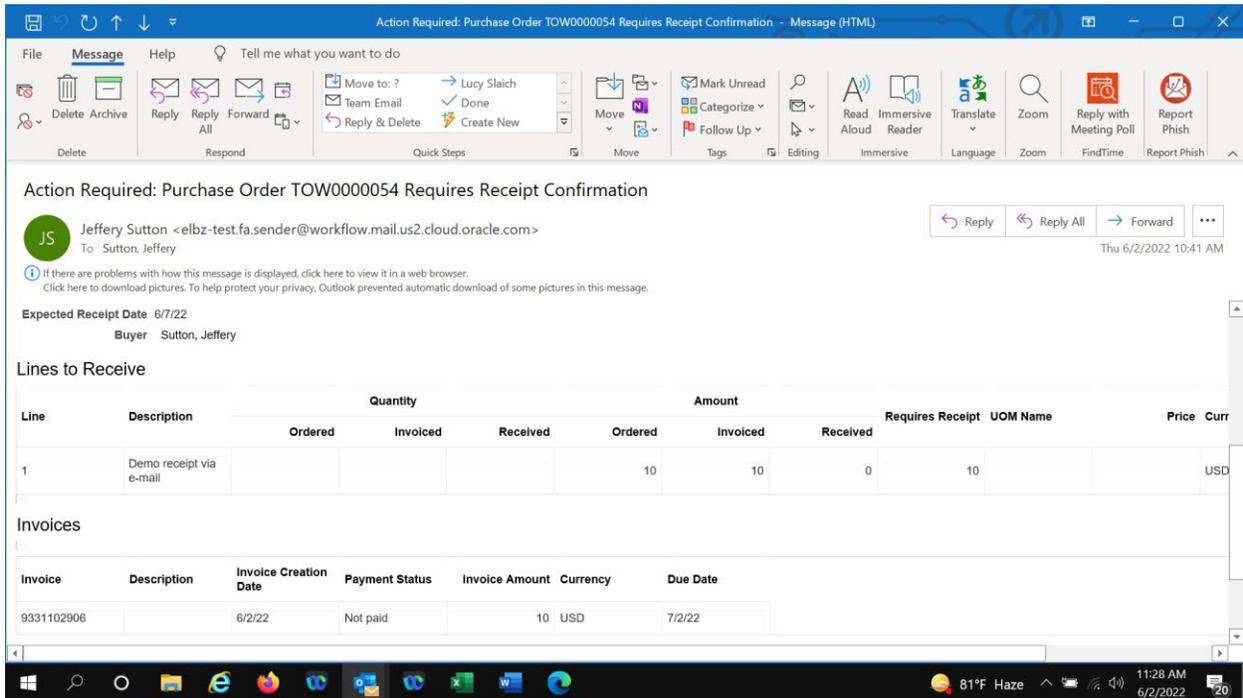
- Purpose:** Confirm a receipt.
- How to Access:** Navigate to the corresponding email.
- Helpful Hints:** Be sure to keep in mind that...
 - Reference the appendix at the end of this document for instructions on confirming a receipt using the notification bell in Stratus.
 - The ability to include comments and attachments is only available in the Receiving Module.
- Procedure:** Complete the following steps to confirm a receipt:

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

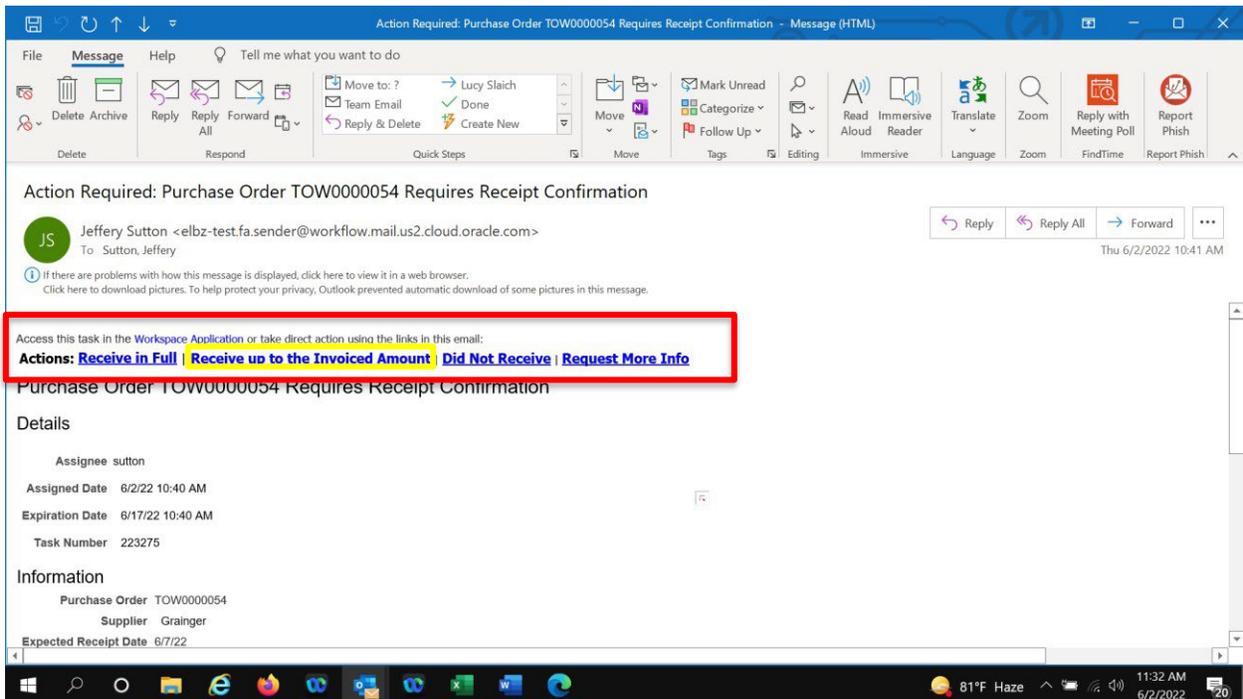


2. As you scroll down, you can see additional information about the transaction, including the purchase order number and amount, the supplier, the invoice number, and the amount invoiced.

Purchasing – Receiving Confirmation

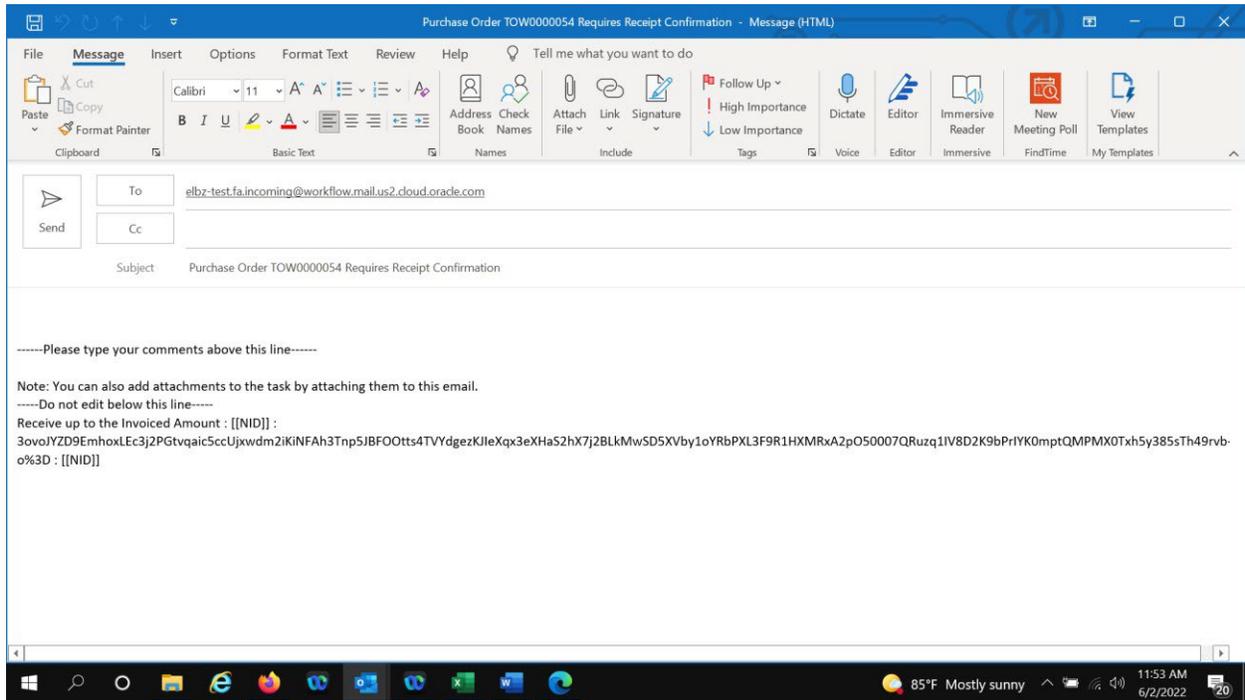


3. At the top of the email, the possible actions are listed: **Receive in Full, Receive up to the Invoiced Amount, Did Not Receive, and Request More Info.**



4. Select **Receive up to the Invoiced Amount** to complete this task for a single invoice.
- Select **Receive in Full** ONLY if this is the final payment for that purchase order. Selecting Receive in Full will close the purchase order for receiving and release any encumbered funds back into your operating budget.
 - 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.)

Purchasing – Receiving Confirmation



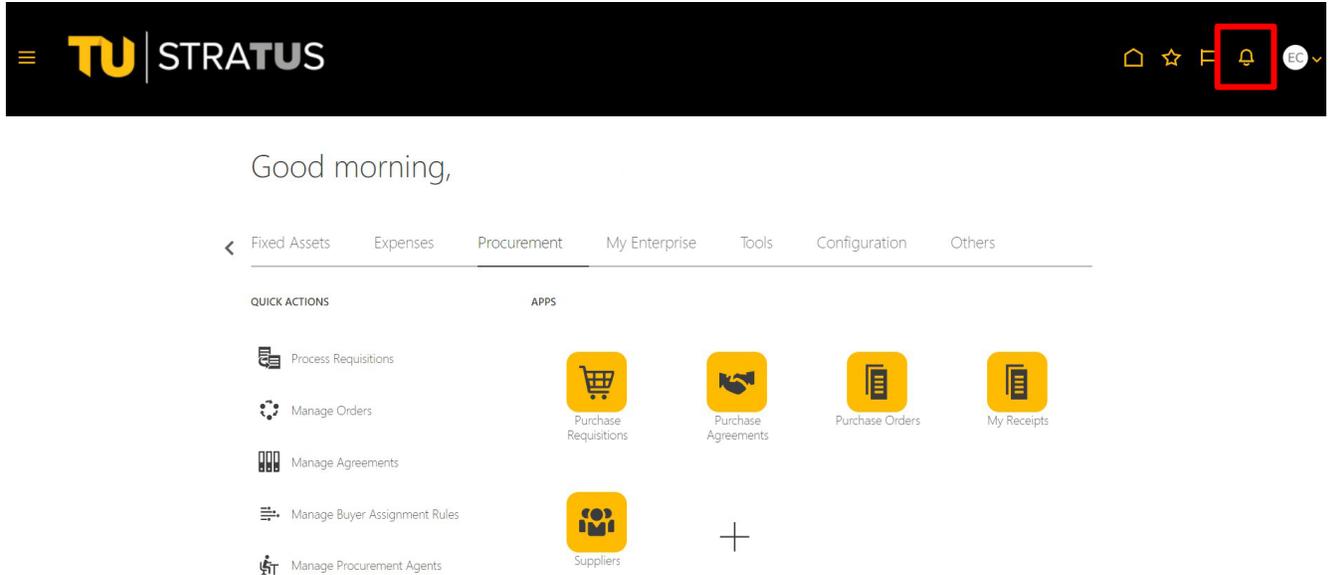
NOTE: Once a notification is sent, it is up to the requester to act on it manually. Notifications by default have an expiration date of one week, after which the notification escalates to the line manager of the requester. After one week of escalation, the notification expires.

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.

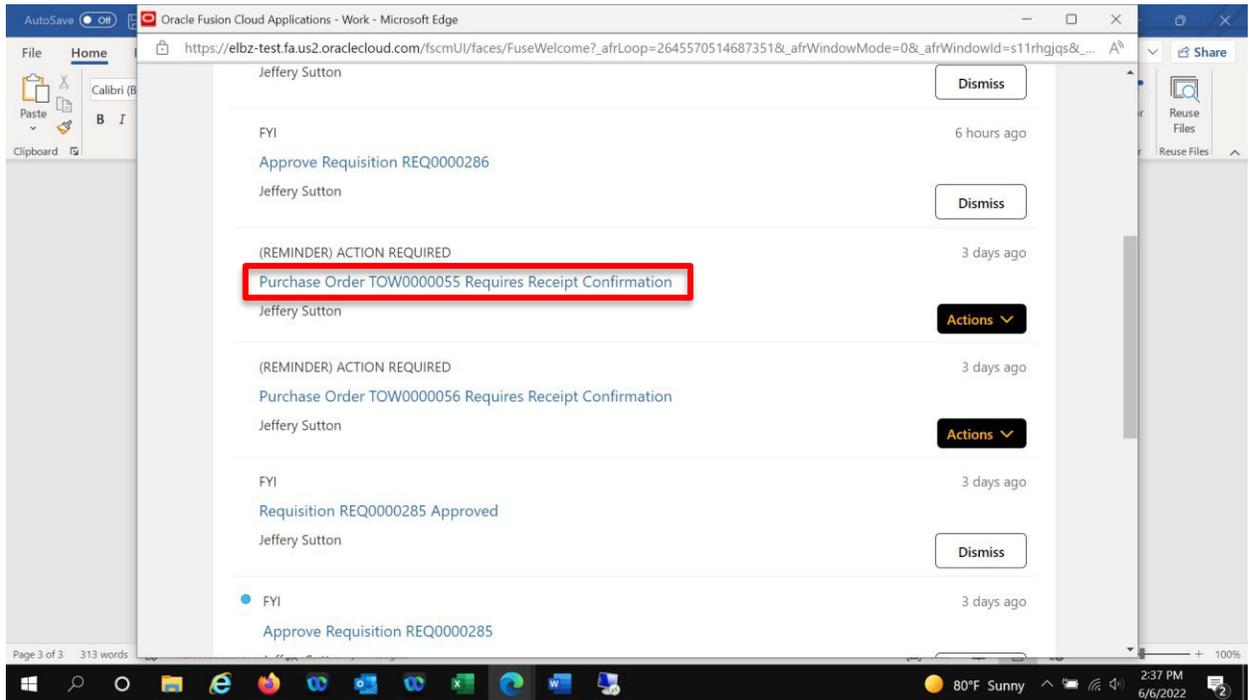
Appendix – Confirm a Receipt using the Notification Bell

This section will show how to confirm a receipt using the notification bell in Stratus.

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



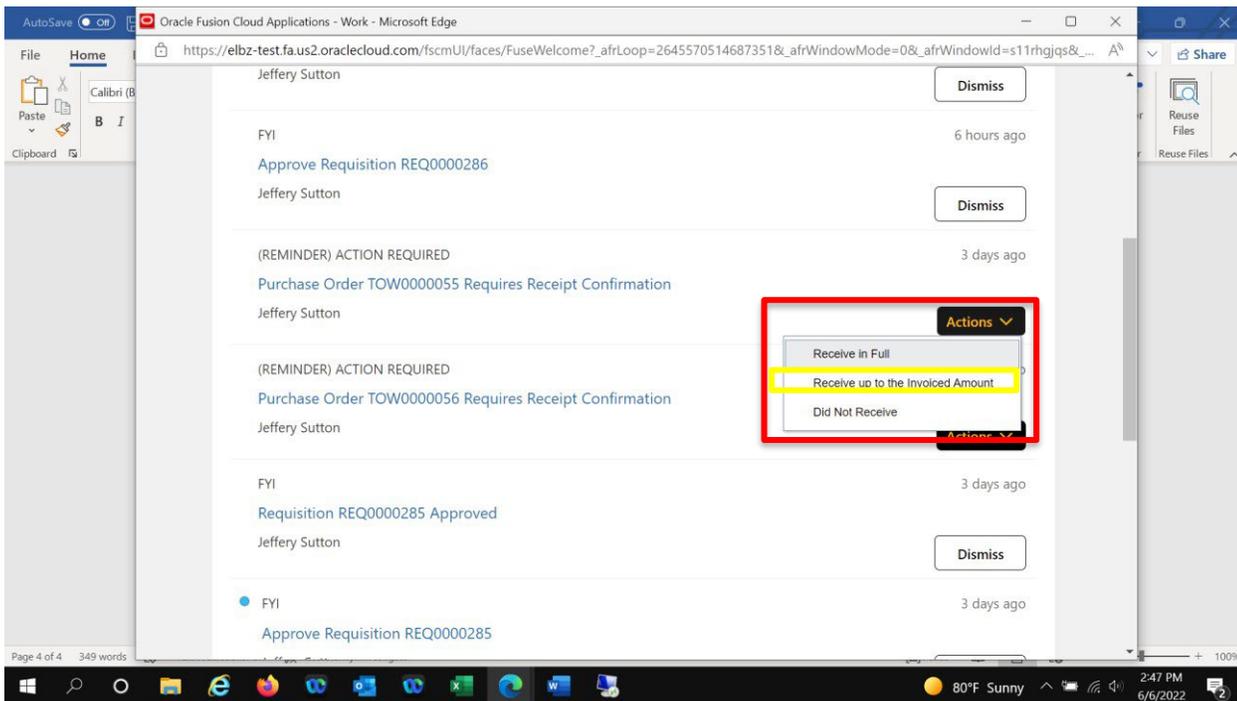
- You will see the purchase order number followed by "Requires Receipt Confirmation".



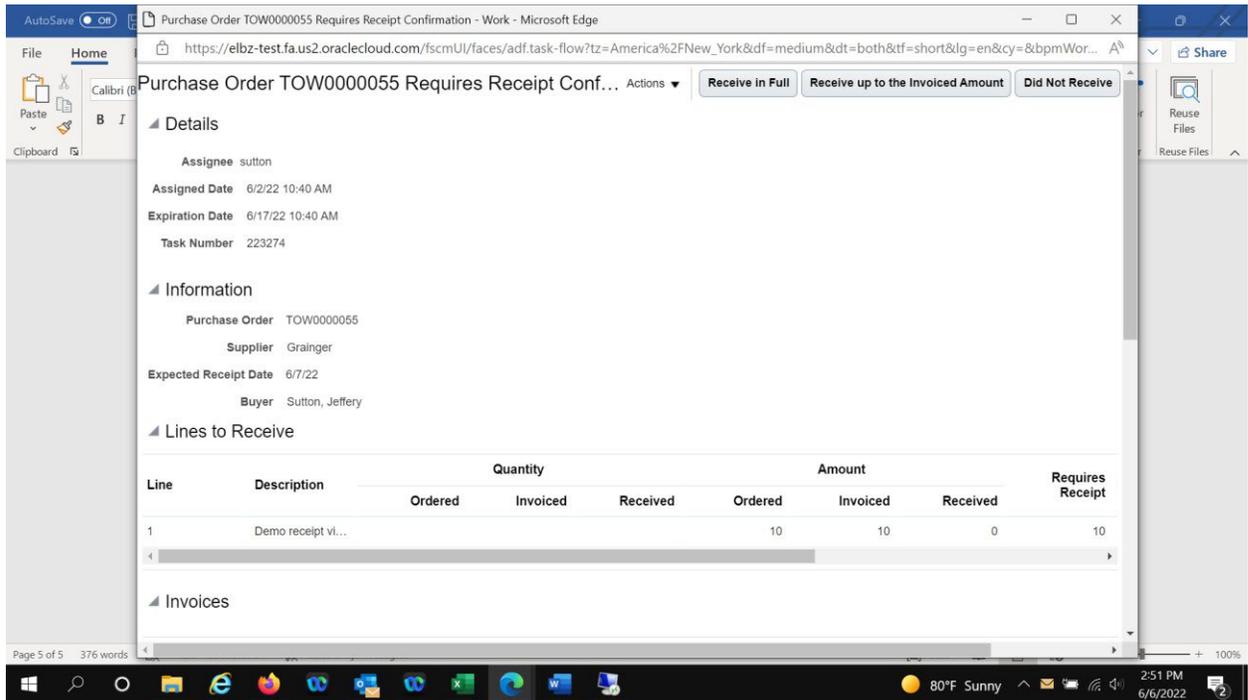
Select **Receive up to the Invoiced Amount** to complete this task for a single invoice.

- Select **Receive in Full** ONLY if this is the final payment for that purchase order. Selecting Receive in Full will close the purchase order for receiving and release any encumbered funds back into your operating budget.
- 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.)

(Note: For this example, we will click on the blue link for "Purchase Order TOW0000055".)



- 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

