

Receipts - Creating, Editing, and Deleting


This document is a quick reference guide for procurement users who need to create, edit, or delete a receipt in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

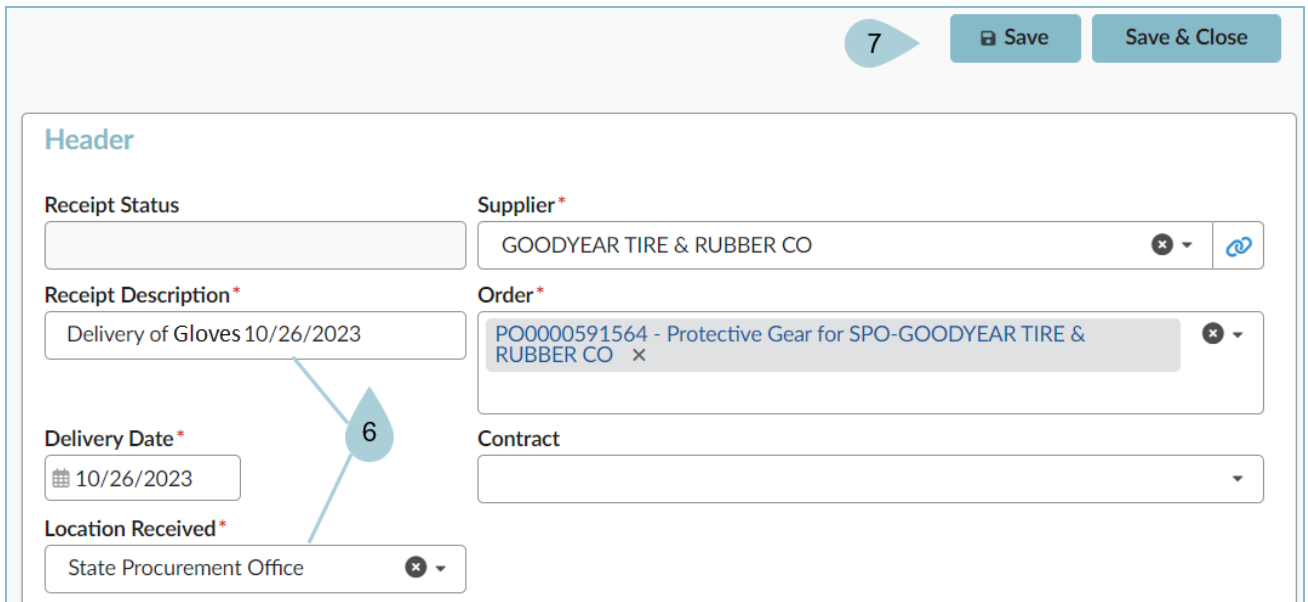
Receivers can create a receipt from the following areas (**Follow your Agency's guidelines**):

1. Within a purchase order (PO),
2. From the pending receipts menu, and
3. From the Create Receipts menu.

Once a receipt is submitted, it will be automatically approved. Users can edit a receipt while in Draft status. Lastly, users can delete receipts if submitted in error or if there was an issue with the receipt submitted before an invoice has been applied to that receipt.

Creating a Receipt from a PO

1. Log into app.az.gov
2. Navigate to the **Procurement** dropdown menu and select **Browse Orders**
3. In the **Browse Orders** Page, search for the PO for which you wish to create a receipt.
4. Open the order you would like to create a receipt for by clicking the **Pencil**  icon.
5. On the order, click **Create Receipt**.
6. On the Receipt page, complete the **Receipt Description** and **Location Received**.
7. Click **Save**.



7 Save Save & Close

Header

Receipt Status

Supplier* GOODYEAR TIRE & RUBBER CO

Receipt Description* Delivery of Gloves 10/26/2023

Order* PO0000591564 - Protective Gear for SPO-GOODYEAR TIRE & RUBBER CO

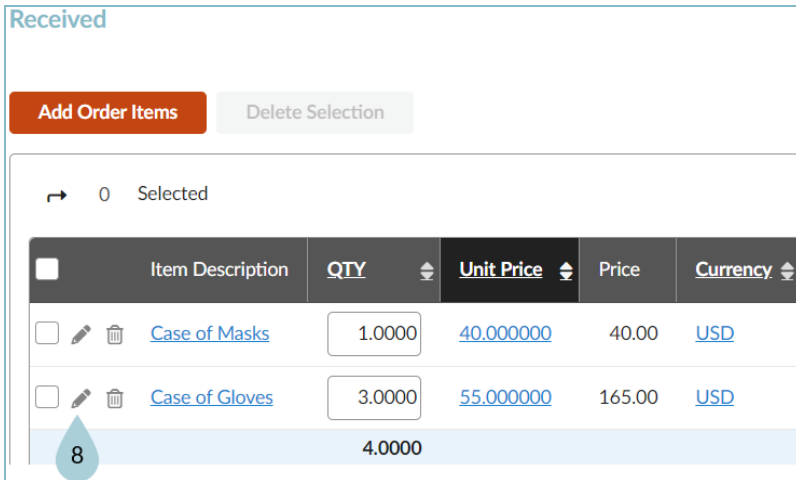
Delivery Date* 10/26/2023

Contract

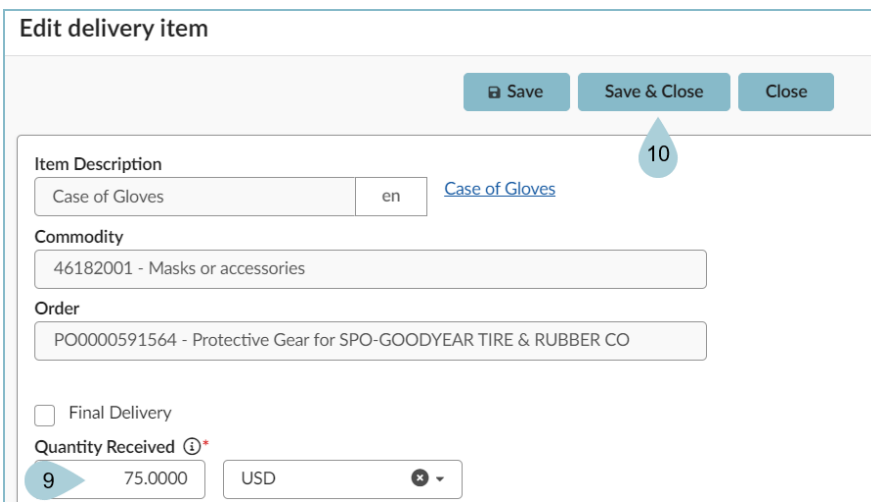
Location Received* State Procurement Office

6

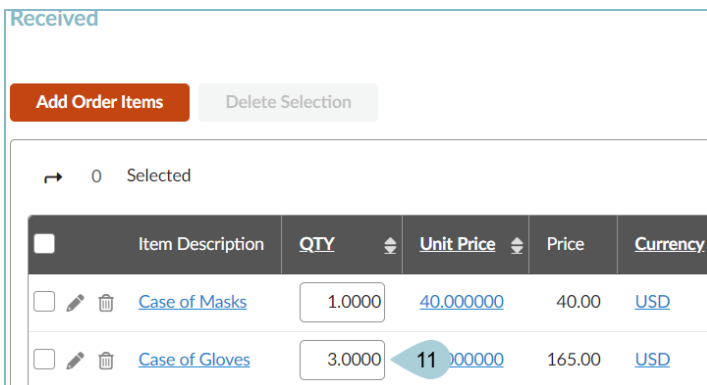
- Navigate to the **Received** section. If you are receiving by dollar amount or receiving a service provided, click the **Pencil** icon next to the item you are receiving.




- On the popup, edit the quantity you are receiving in the **Quantity Received** field.
- Click **Save & Close**.



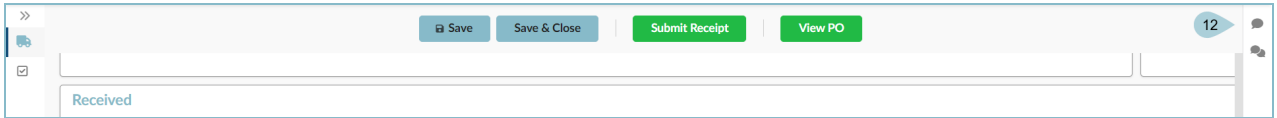
- If you are receiving by quantity edit the amount in the Quantity (QTY) column and click **Save**.



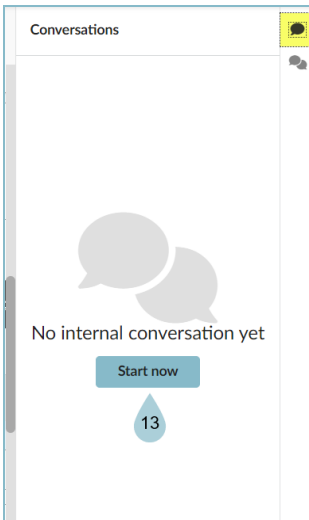


Ensure you delete the line items you **DO NOT** wish to receive by clicking the Trash  icon.

12. Attach your invoice or packing slip to the receipt by opening an internal conversation.



13. Click the **Start now** button.



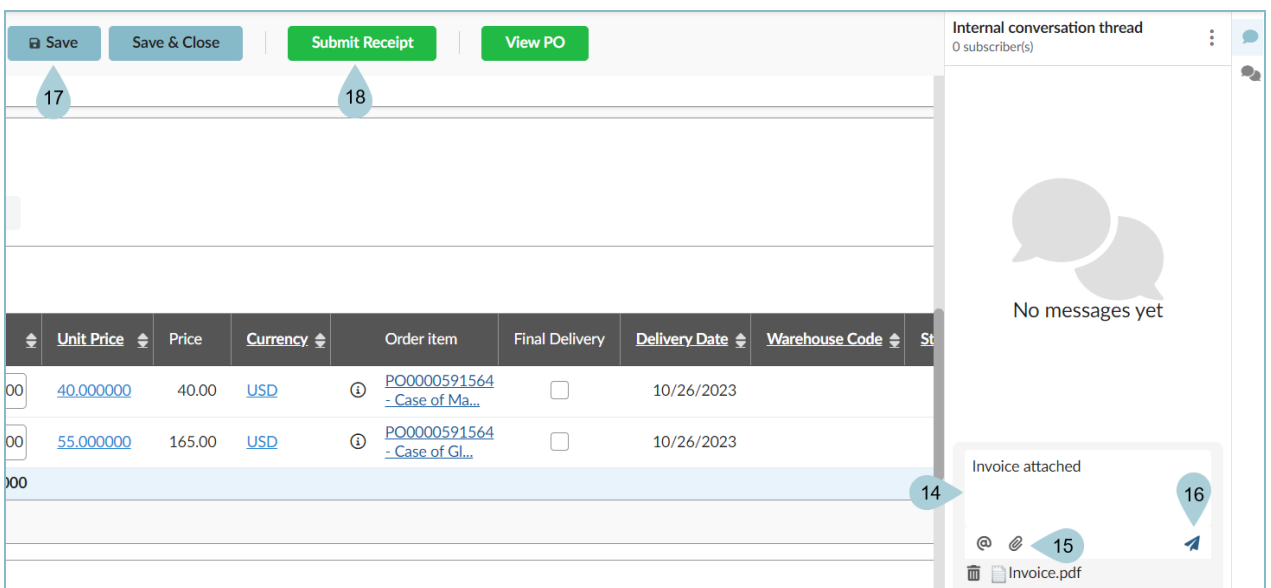
14. Type a message in the **Add a Message** field.

15. Click the **paperclip icon** to attach the document.

16. Click the **paper airplane icon** to send.

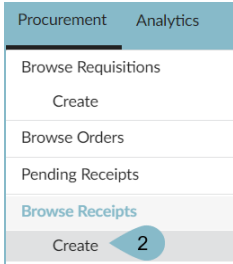
17. Click **Save**.

18. Click **Submit Receipt**.

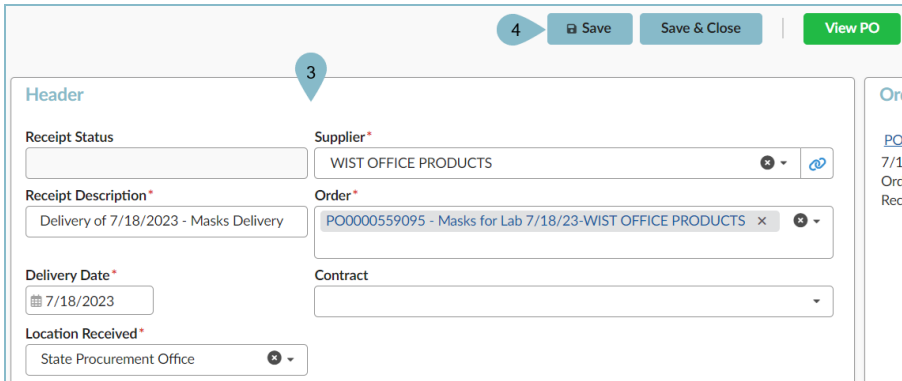


Creating a Receipt from the Create Receipts Menu

1. Log into app.az.gov
2. Navigate to the **Procurement** dropdown menu and select **Create** under Browse Receipts.



3. On the Create page, complete the **Receipt Description, Delivery Date, Location Received, Supplier, and Order.**
4. Click **Save**.

A screenshot of a 'Create Receipt' form. At the top right, there are buttons for 'Save', 'Save & Close', and 'View PO'. A blue callout bubble with the number '4' points to the 'Save' button. The form is divided into a 'Header' section and a 'Details' section. The 'Header' section includes fields for 'Receipt Status', 'Supplier' (WIST OFFICE PRODUCTS), 'Receipt Description*' (Delivery of 7/18/2023 - Masks Delivery), 'Order*' (PO0000559095 - Masks for Lab 7/18/23-WIST OFFICE PRODUCTS), 'Delivery Date*' (7/18/2023), and 'Location Received*' (State Procurement Office). A blue callout bubble with the number '3' points to the 'Supplier' field. The 'Details' section includes a 'Contract' field. On the right side, there is a vertical sidebar with the text 'Ord', 'PO0', '7/18', 'Orde', and 'Rece'.

5. Navigate to the **Received** section, and click the **Pencil** icon next to the item you are receiving.
6. On the popup, edit the quantity you are receiving in the **Quantity Received** field.
7. Click **Save & Close**.

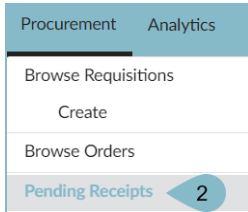


Ensure you delete the line items you **DO NOT** wish to receive by clicking the Trash  icon.

8. Complete steps 14-17 in the previous section.

Creating a Receipt from the Pending Receipts Menu

1. Log into app.az.gov
2. Navigate to the **Procurement** dropdown menu and select **Pending Receipts**.



3. In the **Pending Receipts** page, search for the PO you would like to create a receipt for.



To find a PO enter the PO Number into the **Order** field within the **Advanced Search**

4. Select all of the desired line items you wish to receive by clicking the checkbox
5. Adjust the **Quantity to Receive** as needed.
6. Click **Create Deliveries**.

Order	Supplier	Purchase Requisition	Requester	Item	Amount	Currency	Total Ordered Quantity	Delivered	QTY to Receive
<input checked="" type="checkbox"/> PO0000559087	Saraji International Inc	Req. 7/11/2023	176UPGRADE Buyer2	KN95 Masks - Standard Qty - 2-5 Day Delivery	25.00	USD	100.0000	0.0000	50
<input checked="" type="checkbox"/> PO0000559087	Saraji International Inc	Req. 7/11/2023	176UPGRADE Buyer2	KN95 Masks - Standard Qty - 6-10 Day Delivery	3.00	USD	20.0000	0.0000	10

2 Record(s)

7. On the popup, enter the **Delivery Location**, **Delivery Date**, and **Short Description**.
8. Click **Create Delivery**.

Create Massive Deliveries

Close | Create Delivery

Delivery Location *
State Procurement Office

Delivery Date
7/18/2023


Short Description
Delivery of 7/18/2023

9. Click on the Receipt Link created.



10. Complete steps 14-17 in the first section of this document.

Editing a Receipt

1. Navigate to the **Procurement** dropdown menu and select **Browse Receipts**.
2. In the **Browse Receipts** Page, search for the receipt you would like to edit.
3. Open the receipt you would like to edit by clicking the **Pencil**  icon.




In order to edit a receipt it must be in DRAFT status.

4. Modify the fields you want to edit and click **Save**.
5. Once complete editing, Click **Submit Receipt**.

Deleting a Receipt



Receivers can delete a receipt if it was created incorrectly. Receivers can delete receipts as long as any invoice has not been created on the PO.

1. Navigate to the **Procurement** dropdown menu and select **Browse Receipts**.
2. In the **Browse Receipts** Page, search for the receipt you would like to delete.
3. Click the **Trash**  icon to delete the receipt.

Resources

Click the link below for more information on the requisition creation processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/procure-pay-grgs-176>