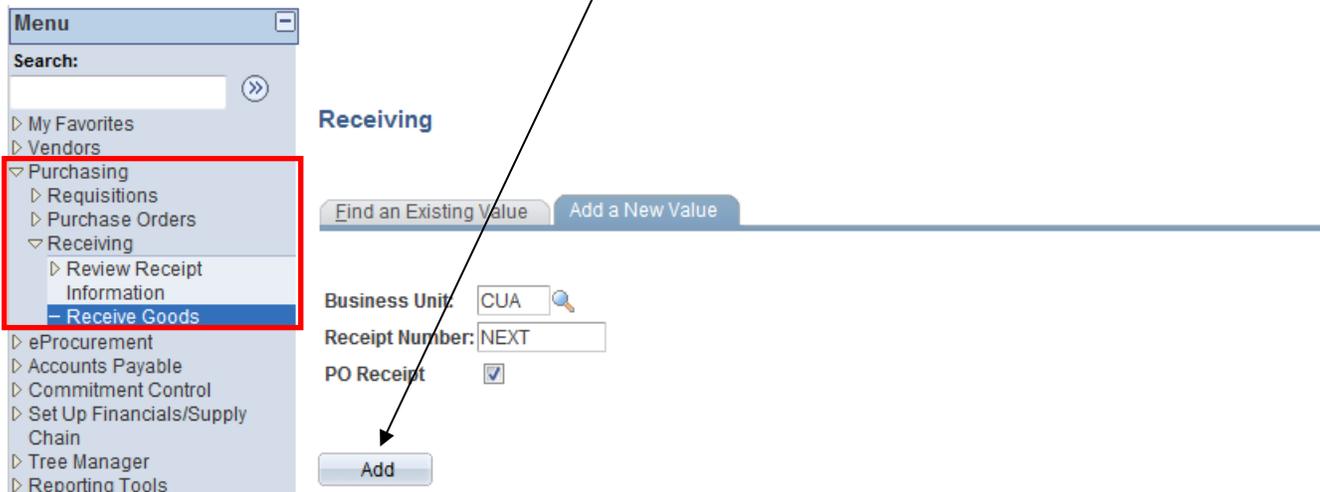


Receiving Goods or Services in Cardinal Financials

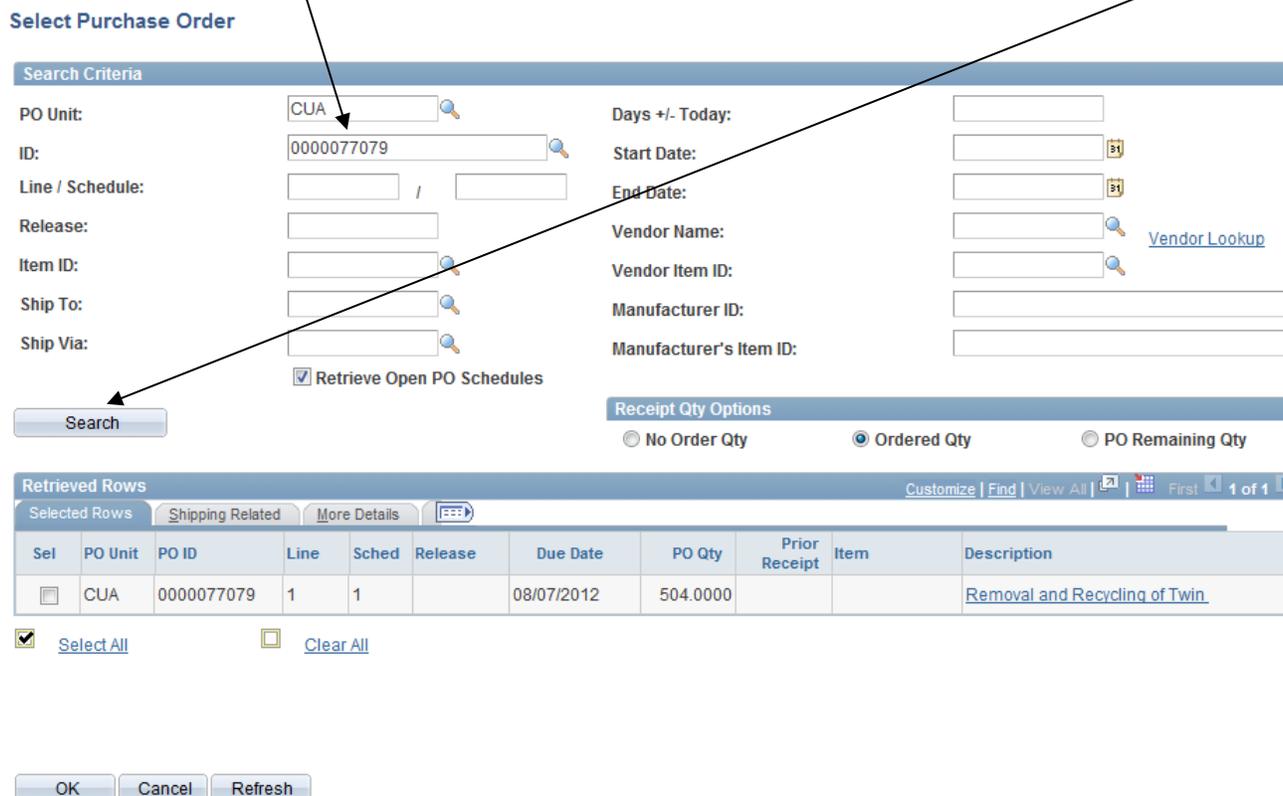
Note: The receiving process is crucial and is directly related to the payments released out of Accounts Payable to the Vendor. In other words, what you receive is the amount that can be paid to the Vendor. It is important that you receive only the portion of your PO, for which payment needs to be released. On the other hand, if your PO is getting paid in full, you can receive all the lines.

Follow navigation as seen on the left. Then click **Add**.



The screenshot shows the 'Menu' on the left with 'Receiving' selected under 'Purchasing'. The main area is titled 'Receiving' and has two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs are fields for 'Business Unit' (CUA), 'Receipt Number' (NEXT), and a checked 'PO Receipt' checkbox. An 'Add' button is at the bottom.

Enter your **Purchase Order number** in this field. Please ensure that all other fields are blank. Then click **Search**.



The 'Select Purchase Order' form has search criteria fields: PO Unit (CUA), ID (0000077079), Line / Schedule, Release, Item ID, Ship To, Ship Via, Days +/- Today, Start Date, End Date, Vendor Name, Vendor Item ID, Manufacturer ID, and Manufacturer's Item ID. There is a 'Search' button and a 'Retrieve Open PO Schedules' checkbox. Below the form is a table of 'Retrieved Rows'.

Selected Rows	Shipping Related	More Details								
Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input type="checkbox"/>	CUA	0000077079	1	1		08/07/2012	504.0000			Removal and Recycling of Twin

Buttons: [Select All](#) [Clear All](#)

Click this **check box** and then click **OK**. If you want to receive multiple lines, you can use **Select All**.

Select Purchase Order

Search Criteria

PO Unit: Days +/- Today:

ID: Start Date:

Line / Schedule: / End Date:

Release: Vendor Name: [Vendor Look](#)

Item ID: Vendor Item ID:

Ship To: Manufacturer ID:

Ship Via: Manufacturer's Item ID:

Retrieve Open PO Schedules

Search

Receipt Qty Options
 No Order Qty Ordered Qty PO Remaining Qty

Retrieved Rows [Customize](#) | [Find](#) | [View All](#) | | [First](#) | [1](#)

Selected Rows	Shipping Related	More Details								
Selected	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	CUA	0000077079	1	1		08/07/2012	504.0000			Removal and Recycling of Twin

[Select All](#) [Clear All](#)

Depending on the '**Quantity**' or '**Amount**' that you are receiving, you can alter the numbers to coincide with the actual goods or services that you have physically received.

[New Window](#) [Help](#) [Customize Page](#)

Maintain Receipts

Receiving

Business Unit: CUA Receipt Status: Fully Received

Receipt ID: 0000020859 [Add Header Comments](#) [Activities](#)

[Header Details](#) [Document Status](#)

Header

Select Purchase Order

Receipt Lines [Customize](#) | [Find](#) | [View All](#) |

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information						
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM
1		Removal and Recycling of Twin	<input type="text" value="504.0000"/>	<input type="text" value="EA"/>	<input type="text" value="6.90000"/>	504.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="EA"/>

Run Close Short [Interface Asset Information](#)

On clicking **Save**, you'll get a **Receipt ID**, which confirms the receipt of your item in the system.

Note: If your PO has **negative or Zero dollar lines**, you may receive an error while saving your transaction. To circumvent this issue, first receive the positive lines of the PO and then receive the negative or zero dollar lines. Please see below for more details.

Search for the PO by filling the fields below. Click on the **'More Details'** tab to see the **'PO line Amount'** information.

Select Purchase Order

Search Criteria

PO Unit: Days +/- Today:

ID: Start Date: [BT]

Line / Schedule: / End Date: [BT]

Release: Vendor Name: [Vendor Lookup]

Item ID: Vendor Item ID:

Ship To: Manufacturer ID:

Ship Via: Manufacturer's Item ID:

Retrieve Open PO Schedules

Search

Receipt Qty Options
 No Order Qty Ordered Qty PO Remaining Qty

Retrieved Rows

Selected Rows Shipping Related More Details [Filter]

Set	PO Unit	PO ID	Line	Sched	Model	Manufacturer	Mfg ID	Mfg Item ID	PO Amount	Recv Reqd	Rcv Tol %	Price	Category
<input checked="" type="checkbox"/>	CUA	0000076953	1	1					2,912.5000	Y		2912.50000	PRINT
<input type="checkbox"/>	CUA	0000076953	2	1					-1,501.8200	Y		-1501.82000	PRINT

Select All Clear All

OK Cancel Refresh

Select only the positive lines and click **'OK'**.

On the next page, click **'Save'** and you'll see a **'Receipt ID'**.

Maintain Receipts

Receiving

Business Unit: CUA Receipt Status: Fully Received ✘

Receipt ID: 0000021116 [Add Header Comments](#) [Activities](#)

[Header Details](#) [Document Status](#)

Header

Select Purchase Order

Receipt Lines

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Device Trac
1		printing of "tip-in" card for	1.0000	2912.50000	1.0000	Received	PRINT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Trac

Run Close Short [Interface Asset Information](#)

To add the negative or zero dollar PO lines to the same **'Receipt ID'**, click on this link **'Select Purchase Order'**.

Search for the PO by filling the fields below. Click on the 'More Details' tab to see the 'PO line Amount' information.

Select Purchase Order

Search Criteria

PO Unit: Days +/- Today:

ID: Start Date:

Line / Schedule: / End Date:

Release: Vendor Name: [Vendor Lookup](#)

Item ID: Vendor Item ID:

Ship To: Manufacturer ID:

Ship Via: Manufacturer's Item ID:

Retrieve Open PO Schedules

Receipt Qty Options

No Order Qty Ordered Qty PO Remaining Qty

Retrieved Rows

Selected Rows Shipping Related More Details

Sel	PO Unit	PO ID	Line	Sched	Model	Manufacturer	Mfg ID	Mfg Item ID	PO Amount	Recv Reqd	Rcv Tol %	Price	Category
<input type="checkbox"/>	CUA	0000076953	2	1					-1,501.820	Y		-1501.82000	PRINT

[Select All](#) [Clear All](#)

You can now select the negative or zero dollar lines and click 'OK'.

Click 'Save' to complete receiving your PO.

Maintain Receipts

Receiving

Business Unit: CUA Receipt Status: Fully Received

Receipt ID: 0000021116 [Add Header Comments](#) [Activities](#)

[Header Details](#) [Document Status](#)

Header

Select Purchase Order

Receipt Lines Personalize Find View All First 1-2 of

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Device Trac
1		printing of "tip-in" card for	1.0000	2912.50000	1.0000	Received	PRINT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Trac
2		decrease purchase req change i	1.0000	-1501.82000	1.0000	Received	PRINT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Trac

Run Close Short [Interface Asset Information](#)