



ARIZONA DEPARTMENT OF ADMINISTRATION  
STATE PROCUREMENT OFFICE

## STANDARD PROCEDURE

### DESCRIPTION

**Title:** ProcureAZ Receiving

**Effective:** October 1, 2011

**No.** SP 022

**Revision:** 0

#### **Standard Procedure for Receiving items in ProcureAZ and creating a receipt.**

Receipts are created for each received shipment of goods or service. Completing receipts enables accounting to perform a three-way match between the PO, Receipt and Invoice to ensure only received goods and services are paid.

### STANDARD PROCEDURE

#### **1. CREATE A RECEIPT**

- 1.1. Search for Purchase Order. To receive items/services a "receipt(s)" must be created. Find the corresponding PO and indicate the quantity or dollar amount of an ordered good or service that has been received, returned or cancelled.

See: ProcureAZ Quick Reference Guide – General Navigation

ProcureAZ Quick Reference Guide – Receiving Overview

- 1.2. Find the Purchase Order. To find the PO, the user can use **Advanced Search** and select **Purchase Orders** in the Document Type dropdown. Enter the last few numbers of the PO# in the **PO# field**; click **Find It**.

See: ProcureAZ Quick Reference Guide – General Navigation

ProcureAZ Quick Reference Guide – Receiving Overview

- 1.3. Create Receipt. Once the PO search results have returned, select the link in the **Purchase Order #** column to view the PO. In the **Receipt Information** section, select **Create Receipt**.

#### **2. RECEIVE ITEM(S)**

- 2.1. Enter required receipt data. New Receipt document will display on its **General** tab. To complete a Receipt, proceed through each tab of the document from left to right, providing at least the required data and select **Save & Continue** on each tab as you go. On the final **Summary** tab review the document.

- 2.2. Enter Receiving Information. If all ordered goods/services are delivered, click **Receive All** button. If only a portion of ordered goods/services are delivered, select **Add**

**NOTICE:** This Standard Procedure is provided as a resource to the Procurement Officers of the Agencies, Boards and Commissions of the State of Arizona. While this Standard Procedure is an example of a legally compliant, procedurally efficient and fiscally prudent process, it is not intended to represent the only such process allowable under the Arizona Procurement Code, ARS 41 § 41-2501, et. seq. Depending on the circumstances surrounding a given procurement, deviation from this Standard Procedure may be necessary and/or preferable. Procurement Officers should consult with their Agency Chief Procurement Officer and/or the State Procurement Office if they have any questions regarding the application of this Standard Process.

**Receiving** next to each item delivered to indicate the quantity or dollars received and/or returned, select **Save & Exit**

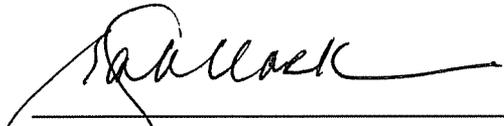
- 2.3. Attach Documentation. Proceed to the **Attachment** tab and select **Add Attachment**. Attach additional documentation related to the Receipt including packing slips and invoices.

### 3. APPROVE

- 3.1. Submit for Approval. Submit your Receipt document for approval. Click **Submit for Approval** button on the bottom of the Summary tab.
- 3.2. Enter Approvers. Approval path triggered by the document will appear on the screen. Most Receipts do not trigger an approval path, however if there is an item that could require a tag, an approval path is triggered. If no approval path is shown and one is necessary, click **Add Approver**, and select **Save & Continue**. If an approval path is not necessary, select **Automatic Approval** and the **Save & Continue** button.
- 3.3. Save Data. At the **Summary** tab, you must ensure you complete receiving by selecting the **Save and Continue** button.

### 4. EFFECTIVE

This Standard Procedure is hereby authorized and effective this 1<sup>st</sup> day of October, 2011, unless otherwise revised or repealed.



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