

eShop How-To Sheets

Receipting your purchase order

This how-to sheet outlines the steps required to:

- Receipt a purchase order.
- This step is required for purchase orders of goods and services valued at \$25,000 or more. The university needs to know if large purchases have been received before invoices are paid.

eShop's purchase requisition form should be used for:

- Non-catalogue items, services (including consulting), and standing orders.
- Requisitioning goods or services above the \$25,000 threshold, or for low dollar value purchases where the vendor does not accept a procurement card.

Additional information is available:

- The Procurement Policy ([available on the University Secretariat's website](#))
- [The 'How to Buy' page on Procurement Services' page](#)

Last updated February 22, 2024.

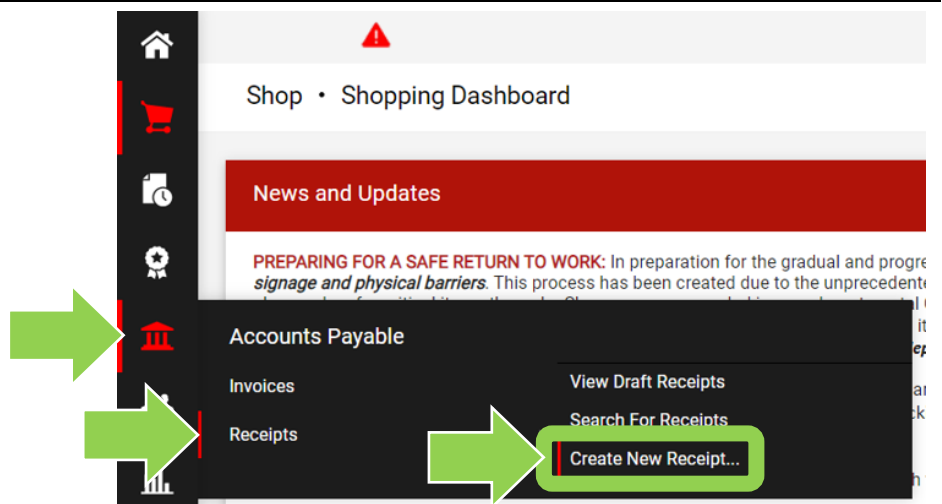
THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

You have received a good or a service that has been completed and is valued at \$25,000 or more.

IMPORTANT! If you've received an invoice directly from the vendor, make sure that you email it to accounts.payable@carleton.ca.

1. Once logged into eShop, click on the **'Accounts Payable'** icon.

When the 'Accounts Payable' window opens, hover over the white **'Receipts'** text, and click on the **'Create New Receipt ...'** option.



2. In the **'Type'** field, click on the drop-down arrow and choose the option that makes the most sense for your order.

Type the purchase order number in the **'PO numbers'** field and click the red **'Create'** button.

TIP: If you need help finding the purchase order number, reference the email reminder OR review one of the 'Searching Documents' how-to sheets.

Create Receipt

Type: Cost Receipt

From: PO

PO numbers: P0110731

Create Cancel

3. eShop has pulled all of the information from the purchase order into the new window.

Cost Receipt • 566074

Summary Comments Attachments History

Receipt Name: 2023-05-16 travellerfour 02

Date Received: 16/05/2023

Packing Slip No.

Vendor Name: Grand And Toy Limited

Received by: Traveller Four

Receipt Address: Attn: Traveller Four, Room: 1005, Robertson Hall, 1125 Colonel By Drive, Ottawa, ON K1S 5B6, Canada

Draft

Details

Creation Date: 16/05/2023 10:33:02 AM

Source: Manual

Vendor: Grand And Toy Limited

Received by: Traveller Four

Total (258.42 CAD)

Subtotal: 258.42

Related Documents

Purchase Order: P0110731

4. Scroll down to the 'PO' window.

If required, update the 'Pre-Tax Amount' field to match the invoice.

PO • P0110731

Line	Item	Catalog No.	Pre-Tax Amount	Status
1	LCD MONITOR ARTICULATING ARM I	SYS306605	216.37 CAD	Cost Received

ITEM DETAILS

Contract No.: no value

Line Item Type: no value

Flex Field 2:

Attachments: Add

Notes:

Draft

Details

Creation Date: 16/05/2023 10:33:02 AM

Source: Manual

Vendor: Grand And Toy Limited

Received by: Traveller Four

Total (258.42 CAD)

Subtotal: 258.42

Related Documents

Purchase Order: P0110731

5. To complete the receipt, click on the red **'Complete'** button.

Quantity Receipt • 461949

Summary Comments Attachments History

Receipt Name: 2021-10-20 requ

Draft

Details

Creation Date: 16/05/2023 10:33:02 AM

Source: Manual

Vendor: Grand And Toy Limited

Received by: Traveller Four

Total (258.42 CAD)

Subtotal: 258.42

Related Documents

Purchase Order: P0110731

What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.