Step-by-Step Guide
Documenting Returned Items (& Fixing Receipts That Are Wrong)

In This Guide
Documenting item returns within CU Marketplace is a similar process to entering receiving. (Incorrect receipts are fixed using the same process as documenting a returned item.) These steps can even be done at the same time receiving is entered for other items within the same Purchase Order (PO).

This guide discusses:
- Locating POs
- Documenting returns (fixing wrong receipts)

Don’t forget to contact the supplier to coordinate a return! This process only documents a return – it doesn’t communicate a return to the supplier.

Procedure
1. Begin by accessing CU Marketplace via your campus portal. Locate your CU Resources section and, under the Business Applications area, select the CU Marketplace link.

2. Locate your PO using one of the following methods:

   **Method 1: PO # known**
   - If you know the PO #, use the quick search area located in the upper right corner of your screen.
   - Select PO No. from the dropdown menu and enter the PO # in the next field; click Go.

   **Method 2: PO # not known**
   - If you do not know the PO #, use the document search tab within your top navigation toolbar.
   - If needed, click the advanced search link in the upper right corner of your screen. Use the Search dropdown to search by Purchase Order (or by Requisition or Voucher). Enter your search criteria and click Go.
   - A list of results will appear. Use the left side of your screen to refine your search. Click the PO # to open the PO.
3. On the **draft receipts** page, if needed:
   a. Enter a unique **Receipt Name**.
   b. Enter **Notes** regarding the return.

4. Record the returned (or incorrectly received) items in the **Receipt Lines** section located in the bottom part of your screen.
   - Indicate the returned (or incorrectly received) **Quantity** and, from the **Line Status** dropdown, select **Returned**.
   - To receive and return an item simultaneously, enter the **Quantity** received and click the **Receive & Return** button. A second row will appear to enter the quantity returned.
   - If a line is not being returned or received (or fixed), remove it by clicking the **Remove Line** button.

5. Click the **Complete** button located in the lower right corner of the page.

6. A confirmation page will appear noting the receipt and PO numbers.

   If the returned item is replaced by the supplier, you should enter receiving again to document the replacement.