Receiving in P2P: Quick Start Guide

PeopleSoft Customer Support: 514-4100, Option 2, Option 2 (Mon-Fri 8-5)

1. Log into **PeopleSoft** from a UCSF computer or through VPN access: https://peoplesoft.ucsf.edu/psp/fsprd/?cmd=login
2. Enter **User ID**. If unknown, contact your Access Administrator.
   Note: *P2P users will use the same User ID for RAS, Journals and WebLinks access.*
3. Enter **Password** and click **Sign In** button. Click "Forgot Your Password?" link if needed.

Download P2P documentation from CPBC website, including P2P Receiving Manual:
http://cpbc.ucsf.edu/p2p/how_to_use_p2p.

Steps to Record Receipts for Non-Asset Goods & Services

1. Obtain **Packing Slip** for shipped goods or Invoice for Services. If you are not the physical receiver of the shipment, ensure items have been verified before proceeding.
2. Navigate to **eProcurement>Receive Items**.
3. Click **Add** button under **Add a New Value**.
4. Type 10-digit **PO ID** located on **Packing Slip/Invoice**, clear **Requester** field (if you are not the Requester), and click **Search**.
5. Click **Sel** checkbox next to PO lines to receive, and click **OK**.
6. Click **Source Information** tab to check for PO comments.
7. Click  to view comments for that line, and click **OK**.
8. Update **Receipt Qty or Amount** as needed to reflect shipment, and click **Save**. Status updates to **Received**.
9. OPTIONAL: Under **Optional Input** tab, type **Packing Slip or invoice** reference, and click **Save**.

Check Receipt Status

1. Navigate to **Purchasing>Receipts>Review Receipt Information>Receipts**.
2. Type **PO Number** or other search criteria, and click **Search**.
3. Click Receipt Number or PO Number in Search Results to review information.

Review Document Status

1. Navigate to **Purchasing>Purchase Orders>Review PO Information>Document Status**.
2. Type **PO Number** and click **Search**.
3. Click **PO ID** or **DOC ID** of related **Document Type** (i.e., REQ, Receipt) to view document details.

Edit Receipt

1. Navigate to **eProcurement>Receive Items**, and click **Find an Existing Value** tab.
2. Type **PO Number** or other search criteria, and click **Search**. Search results appear below criteria.
3. Click **Receipt Number** or **PO Number** to edit receipt.
4. Edit **Receipt Qty or Amount**, and click **Save**.

*NOTE: Click "X" in **Receipt Header** to cancel entire Receipt or click "X" on **Receipt Line** to cancel single receipt line.*