I. Receiving Goods and Services

Receiving is the part of the 3 Way Matching process in PeopleSoft. It matches the voucher with the Purchase Order and Receipts. This Matching Process provides a control measure to ensure that we pay for only goods or services received.

Receiving requested goods/services is the trigger for Accounts Payable to finalize payment. If the 3 Way Matching process is not successful, payment will not be made.

II. Purchase Order – Do I need to receive and if so quantity or amount?

Use the Purchase Order Inquiry Navigation to determine the type of PO (Amount or Quantity) you have and whether Receiving is required.

*Main Menu > Purchasing > Purchase Order > Review PO Information > Purchase Orders*

It is important for Requisitioners to know their Purchase Orders and whether receiving is required or not. The following types of Purchase Orders are set automatically:

**Blank Purchase Orders** – Set up as Amount Only and No Receiving Required

**Good/Services On Hand Purchase Orders** – Set up as Amount Only and No Receiving Required
III. Navigation Choices for Receipting:

A. Receipting if you are the Requisitioner using eProcurement:

*Main Menu > eProcurement > Manage Requisitions*

1. Choose the lines that you want to receive and “Receive Selected” to receive the goods/services on this requisition.

   ![Image of Oracle screenshot showing receipting process]

B. Regular Receiving

*Main Menu > Purchasing > Receipts > Add/Update Receipts*

1. Type in a PO ID and Search.

2. Select the lines to receive and click “OK”.

   ![Image of South Carolina screenshot showing receipting process]
3. Identify the quantity or amount to receive and fill in the quantity received or the amount to be received then click Save.

IV. Matching Workbench

Accounts Payable runs the Matching Process every morning. This process performs the 3 Way Match on all open and active vouchers and will place all vouchers not meeting the 3 Way Match on the Match Workbench. All items on the Match Workbench must be cleared by Accounts Payable and/or Purchasing. Accounts Payable will clear items relating to the Voucher and where no Receipt exists. Purchasing will clear discrepancies between the Purchase Order and the Receipt.

Vouchers on Purchase Orders not requiring receipting, will not be subjected to the Matching Process.