MARYLAND JUDICIARY

GEARS General Enterprise And Resource Support

Quick Reference Tip Sheet

<mark>LAST REVISED DATE: 03/10/2021</mark>

General Information

Task	Process Information
Creating a Receipt against a PO (Purchase Order)	A receipt indicates that goods/services have been received. A receipt is created against a Purchase Order. Receipts are not required for Express POs created by AOC Field Users for purchases less than or equal to $2,500. **Exception: Receipts are required for Express POs for District Court.** **NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:** Per the Department of Procurement, Contracts and Grants Administration (DPCGA) procedures, all POs created by DPCGA for the purchase of Goods will be set to Receipt Required. This means that receipts must be completed in GEARS to support these purchases and to successfully complete the matching requirement within the system. (Receipts are not required for the purchase of Services.) If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required.

GEARS Navigation

Purchasing > Receipts > Add/Update Receipts	Favorites ▾ Main Menu ▾ > Purchasing ▾ > Receipts ▾ > Add/Update Receipts

1.0   Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**Select the "Add a New Value" Tab** You will be prompted to select the Purchase Order you are receiving against, on the following screens.	**Receiving** Find an Existing Value **Add a New Value** Business Unit MDJUD 🔍 Receipt Number NEXT PO Receipt ☑ Add

2.	**Click the** [Add] **button.**
3.	**On the** Select Purchase Order **screen:** Enter or use the "look-up" icon to locate the Purchase Order ID you are receiving against.	**Select Purchase Order** Search Criteria PO Unit: MDJUD Days +/- Today: ID: 0000061153 Start Date: Line / Schedule: / End Date: Release: Vendor Name: Supplier Lookup Item ID: Supplier Item ID: Ship To: Manufacturer ID: Ship Via: Manufacturer's Item ID: ☑ Retrieve Open PO Schedules Receipt Qty Options [Search] ○ No Order Qty ● Ordered Qty ○ PO Remaining Qty [OK] [Cancel] [Refresh] **NOTE**: • Be sure PO Unit is "MDJUD". • You can locate your Purchase Order using any of the criteria fields on this screen. The more criteria specified, the more granular your search results will be. If the search results do not display the Purchase Order you are looking for, widen the search by supplying less criteria.
4.	**Click the** [Search] **button.**
5.	**Select Retrieved Rows** Select the checkbox in the "Sel" column only for the PO lines you are receiving.	**Retrieved Rows** Personalize | Find | View All | 🔁 | 🔲 [Selected Rows] [Shipping Related] [More Details] 🔲 Sel | PO Unit | PO ID | Line | Sched | Release | Due Date | PO Qty | Prior Receipt | Item | Description ☑ | MDJUD | 0000061153 | 1 | 1 | 308 | 02/01/2017 | 1.0000 | | | Food Services Judiciary Grants ☑ Select All ☐ Clear All [OK] [Cancel] [Refresh]
6.	**Click the** [OK] **button.**
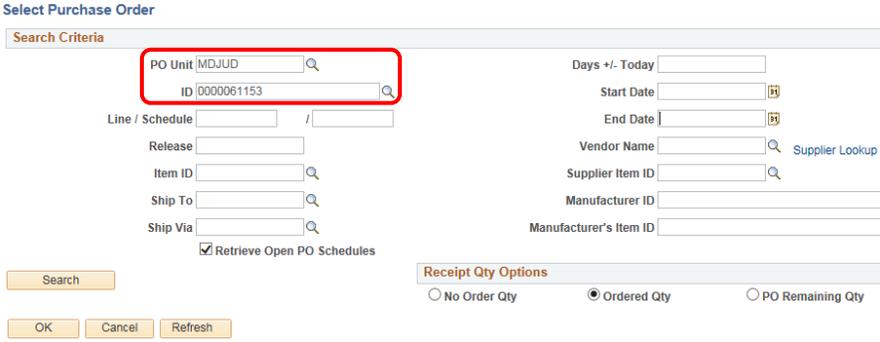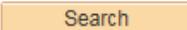
7.	On the Maintain Receipts Receiving screen:	**For each Receipt Line:** • If the reference Purchase Order was distributed by **Quantity**: - Enter the actual *quantity* of Line Items received.

Receipt Lines

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information	

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status
1		Payment Manager - Maintenance	381.0000	EA	312.50000	381.0000	Open
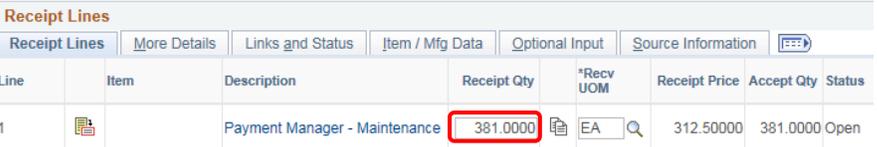
• If the reference Purchase Order was distributed by **Amount Only**:
  - Enter the actual dollar *amount* of Line Items received.

Receipt Lines

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information	

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status
1		Food Services Judiciary Grants	1.0000	3000.00000	1.0000	Open

NOTE: How you receive against a Purchase Order is determined by how the Purchase Order is set-up.

8.	Click the Add Header Comments link.	Add Comments and/or attach any associated documentation to your receipt.

9.	On the Receipt Header Comments screen:	• Enter Comments and/or click "Attach" to associate documentation to your receipt per the following guidance: • **FOR DISTRICT COURT ONLY:** If the item received is barcoded, please include the following in the Header Comments – barcode number, serial number (if applicable), date received, and location. • **FOR DISTRICT COURT ONLY:** You must attach the invoice and/or packing slip to your receipt. • **For receipts for FIXED ASSETS (all others non-District Court):** Please include the following in the Header Comments – serial number (if applicable), date received, and location. **NOTE**: A description of Fixed Assets is provided below. • **NOTE FOR ALL**: Select the "Show at Voucher" check box to make all comments viewable by voucher approvers.

Comments   Find | View All   First 1 of 1 Last

Use Standard Comments   Comment Status Active   Inactivate

Add Comments in this area.

☑ Show at Voucher

Associated Document

Attachment   Attach   View   Delete

From -> RCV MDJUD-NEXT

10.	Click the [OK] button to return to the Maintain Receipts Receiving screen.
	NOTE: After comments and/or attachments are made, the "Add Header Comments" link changes to Edit Header Comments.

11.	Click the [🖫 Save] button.

12.	**Confirm your PO Receipt is saved.**	You have a 10 digit Receipt ID and your Receipt Status is Fully Received.
		Business Unit MDJUD Receipt Status [Fully Received] ✗
		Receipt ID [0000027750] Edit Header Comments Activities
		Header Details Document Status
		NOTES:
		• You can have multiple receipts against a single Purchase Order. The status of "Fully Received" refers to the qty/amount you have specified for the line.
		• It is recommended that you create only <u>one</u> voucher for each receipt. If you believe an exception is necessary, please call the Help Desk.

13.	**FOR DISTRICT COURT ONLY:**	Workflow Notification
	Click the [📧 Notify] button.	**Send Notification**
	Use the notify function to send an email to invoicedc@mdcourts.gov to alert DCHQ that the goods have been received and vouchering can proceed.	Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.
		Notification Details Lookup Recipient
		To: [invoicedc@mdcourts.gov; warehousedc@mdcourts.gov] Delivery Options ☐ RichText
	If the item received is barcoded, please also use the notify function to send an email to warehousedc@mdcourts.gov to alert the DC warehouse that barcoded goods have been received. You can use a semicolon (;) to separate the email addresses.	CC: [ ] BCC: [ ] Priority: [▼] Subject: [Vendor Name xxxxx: Invoice/Order Number #####]✍
		Template: Workflow Notification Priority: %NotificationPriority Date Sent: 2017-02-21
	NOTE: Be sure to include the Vendor Name and Invoice/PO/Receipt Number in the Subject.	Message: [ ]✍
		Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page. [OK] [Cancel] [Apply]
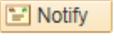
14.	For receipts for FIXED ASSETS (for all others non-District Court): Click the **Notify** button. Use the notify function to send an email to aocfixedassets@mdcourts.gov to alert the fixed assets/warehouse that fixed assets been received. **NOTE:** Be sure to include the Vendor Name and Invoice/PO/Receipt Number in the Subject. **NOTE**: A description of Fixed Assets is provided below.	**Workflow Notification** **Send Notification** Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send. **Notification Details** Lookup Recipient To: aocfixedassets@mdcourts.gov Delivery Options ☐ RichText CC: BCC: Priority: ⌄ Subject: Vendor Name xxxxx; Invoice/Order Number ##### Template: Workflow Notification Priority: %NotificationPriority Date Sent: 2017-02-21 Message: Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page. OK Cancel Apply
15.	**Fixed Assets** Fixed Assets are capital equipment items or furnishings that have a probable useful life in excess of one year and a procurement cost of $1,000.00 or more **per unit**, such as furniture, office equipment, machinery, instruments and other apparatus. Motor Vehicles, firearms and other law enforcement weapons are also included regardless of cost. Sensitive items having a procurement cost of $250.00 or more and a useful life of one year or more are included. Sensitive items are capital or non-capital equipment such as projectors, camera and video cameras, laptops and other portable computers, scanners, telephones, i-pads and the like that are prone to theft and concealable in a handbag or briefcase. Equipment items that are too large for concealment, such as personal computers, chain saws and the like, shall be considered sensitive items if there is a history of loss or theft within a particular Judiciary unit. Non-Capital equipment (expendable items), such as miscellaneous equipment, furniture, desktop articles, supplies and materials and the like, with an acquisition cost of less than $1,000.00, sensitive items with an acquisition cost of less than $250.00, or items with a useful life of less than one year are not included as fixed assets.	

End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.