User Upgrade July 2011

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Upgrade Highlights

1. **Edit and Delete Receipts**

2. **Accounting Code Favorites**

3. **View Comments and History for a Single Transaction in one location (PR>PO>Receipt>Invoice)**
Receive/Complete an Order

All purchase orders over $1499 must be received in Emory Express. Effective July 25, 2011 line items not received must be removed before completion.

1. History
2. My Purchase Orders
3. Check the Selection Box to the right of the Purchase Order you need to acknowledge receiving
4. In ‘Available actions’ choose Create Quantity Receipt
5. Click
6. Enter the quantity received for each item. If a line item was not received,
7. Save updates.
8. Complete.
9. A receipt confirmation will appear. Click on the printer icon to open a printer friendly window.
Editing and Deleting Receipts

A receipt was completed in error can be corrected or deleted if the PO status is not matched.

1. History
2. My Purchase Orders
3. Click the PO No. that needs a revised receipt
4. Click the Receipts tab
5. 
6. Enter the reason in the Comments Box for recordkeeping.
7. 
8. To update the quantity enter the correct amount.
9. To delete the entire receipt

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Accounting Code Favorites

Profile: Accounting Code Favorites (for frequently used accounting code combinations)

1. Select Profile from the header

2. Select Purchasing

3. Select Custom Fields

4. Select Code Favorites:
   Select Add to add, new combinations.

5. Enter Nickname (The nickname will appear as your checkout choice; detailed names are suggested.)

6. Enter a Smart Key and Account Code combination.

7. Choose Default, as applicable

8. Save

Repeat as needed
View All History and Comments

History: PO History or History: My Purchase Orders

1. Select History from the menu bar. Then My Purchase Orders or PO History to look up your PO

2. Select the Purchase Order number you want to view.

3. Select History or Comments

4. Click to filter history

5. Select Filter

6. Show History for All

7. Complete History appears with links to transactions