



Managing Inventory Restock Requisitions and Receipts Overview

This Job Aid provides step-by-step instructions for creating, canceling, and managing Restock Requisitions in Cardinal. It also includes guidance on viewing related Purchase Orders and creating or canceling Restock Receipts. Restock Requisitions are used to replenish inventory and follow a specific process that includes an integration with WebIMS.

Navigation Note: Please note that there may be a Notify button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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# Cardinal Procurement Job Aid

## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

### Revision History

Revision Date	Summary of Changes
3/11/2026	Baseline.

### Creating a Restock Requisition

Creating a Restock Requisition is similar to creating a regular Requisition. However, with a Restock Requisition, the WebIMS Requisition Type must be changed to Restock before any other data entry is completed.

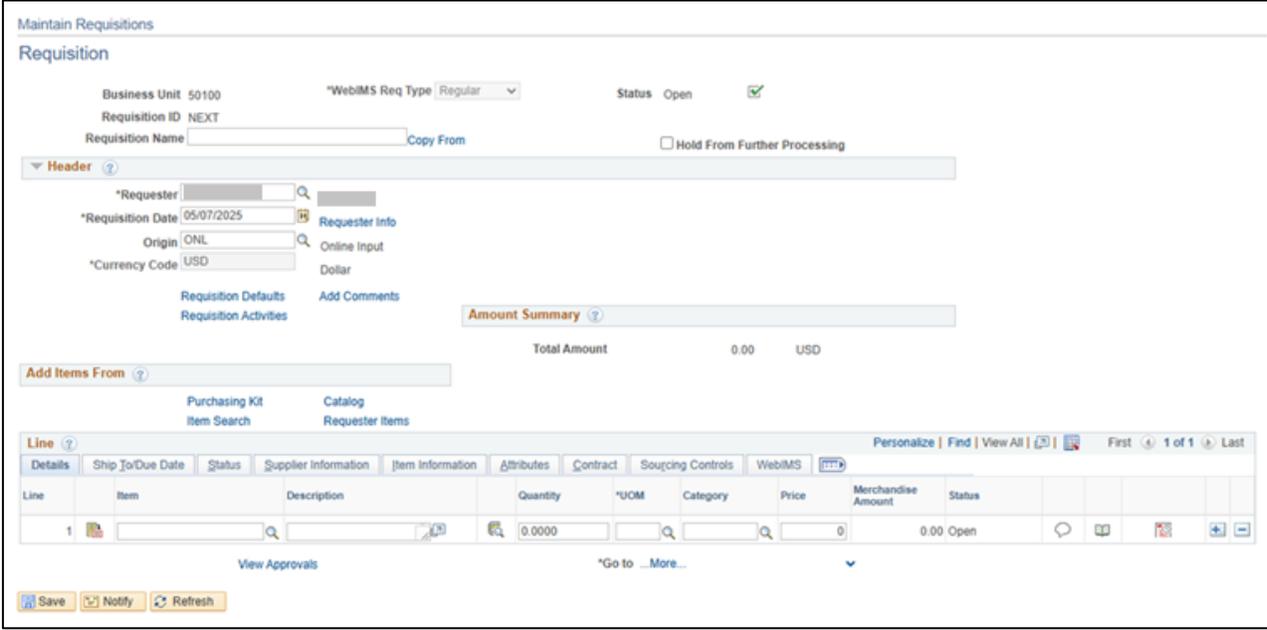
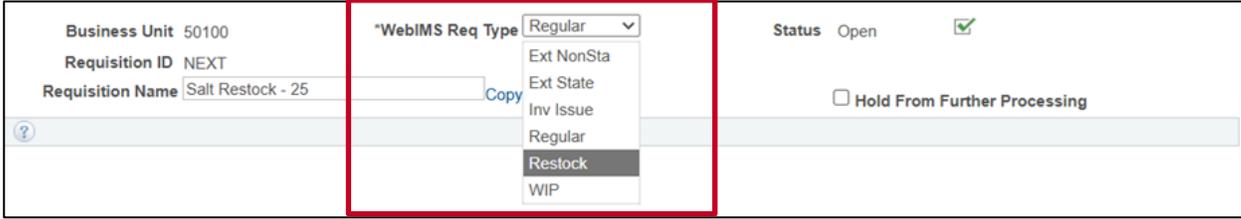
The accounting distribution is set by default and cannot be changed. Like a regular Requisition, enter details in the **Header**, **Lines**, and **Schedule** sections as needed. For more information on processing Requisitions, see the Job Aid **PR342 Creating Regular Requisitions (VDOT Only)**. For more information about inventory issuances, see the Job Aid **PR347 Inventory Issuance (VDOT Only)**.

Step	Action
1.	Navigate to the <b>Requisitions Add a New Value</b> page using the following path: <b>Main Menu &gt; Purchasing &gt; Requisitions &gt; Add/Update Requisitions</b>
<p>The <b>Requisitions Add a New Value</b> page displays.</p> <div data-bbox="186 913 1464 1226" style="border: 1px solid black; padding: 10px;"> <p>Requisitions</p> <p>Add a New Value <span style="float: right;">Find an Existing Value</span></p> <hr/> <p>*Business Unit <input type="text" value="50100"/> <input type="button" value="Q"/></p> <p>*Requisition ID <input type="text" value="NEXT"/></p> <p><input type="button" value="Add"/></p> </div>	
	<p>The <b>Business Unit</b> field defaults based on the Agency Business Unit.</p> <p>The <b>Requisition ID</b> field defaults to “NEXT” and should not be changed. Cardinal assigns a Requisition ID when the user saves the Requisition.</p> <div data-bbox="256 1396 675 1530" style="border: 1px solid black; padding: 5px;"> <p>*Business Unit <input type="text" value="50100"/> <input type="button" value="Q"/></p> <p>*Requisition ID <input type="text" value="NEXT"/></p> <p><input type="button" value="Add"/></p> </div>
2.	Click the <b>Add</b> button. <div data-bbox="256 1619 675 1753" style="border: 1px solid black; padding: 5px;"> <p>*Business Unit <input type="text" value="50100"/> <input type="button" value="Q"/></p> <p>*Requisition ID <input type="text" value="NEXT"/></p> <p><input type="button" value="Add"/></p> </div>



# Cardinal Procurement Job Aid

## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

Step	Action																		
	<p>The <b>Maintain Requisitions Requisition</b> page displays.</p>  <table border="1"><thead><tr><th>Line</th><th>Item</th><th>Description</th><th>Quantity</th><th>*UOM</th><th>Category</th><th>Price</th><th>Merchandise Amount</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td></td><td></td><td>0.0000</td><td></td><td></td><td>0</td><td>0.00</td><td>Open</td></tr></tbody></table>	Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	1			0.0000			0	0.00	Open
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status											
1			0.0000			0	0.00	Open											
3.	<p>Click the <b>WebIMS Req Type</b> dropdown button and select “Restock”.</p> 																		
4.	<p>Enter a descriptive title for the Requisition in the <b>Requisition Name</b> field. Otherwise, the Requisition Name will default to the Requisition ID.</p> 																		

Step	Action
	<p>The <b>Header</b> section contains key data such as the <b>Requester</b>, <b>Requisition Date</b>, and <b>Origin</b> fields. This information automatically populates based on the user setup, but can be changed as necessary.</p> <div data-bbox="256 499 1133 884" style="border: 1px solid black; padding: 5px;"> <p><b>Header</b> ?</p> <p>*Requester <input type="text" value="00020828000"/>  Doe, John</p> <p>*Requisition Date <input type="text" value="05/07/2025"/>  <a href="#">Requester Info</a></p> <p>Origin <input type="text" value="ONL"/>  Online Input</p> <p>*Currency Code <input type="text" value="USD"/> Dollar</p> <p><a href="#">Requisition Defaults</a> <a href="#">Add Comments</a></p> <p><a href="#">Requisition Activities</a></p> </div>

Step	Action														
7.	Click the <b>Schedule</b> icon. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;"><b>Status</b></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Open</td> <td></td> <td></td> <td style="border: 2px solid red;"></td> <td></td> <td></td> <td></td> </tr> </table> </div>	<b>Status</b>							Open						
<b>Status</b>															
Open															

The **Maintain Requisitions Schedule** page displays.

Maintain Requisitions

**Schedule**

Business Unit 50100      Requisition Date 08/11/2025  
 Requisition ID NEXT      Status Open

[Return to Main Page](#)

Line	Item	Description	Quantity	Longton	Merchandise Amt	USD
1	7754577327	SALT, SODIUM CHLORIDE, FOR ROA	5.0000	US	515.75	USD

**Schedule**      Personalize | Find | View All |  |       First 1 of 1 Last

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	BEACH AI 	5.0000	103.15000	515.75		Graves, Therese 	Active  

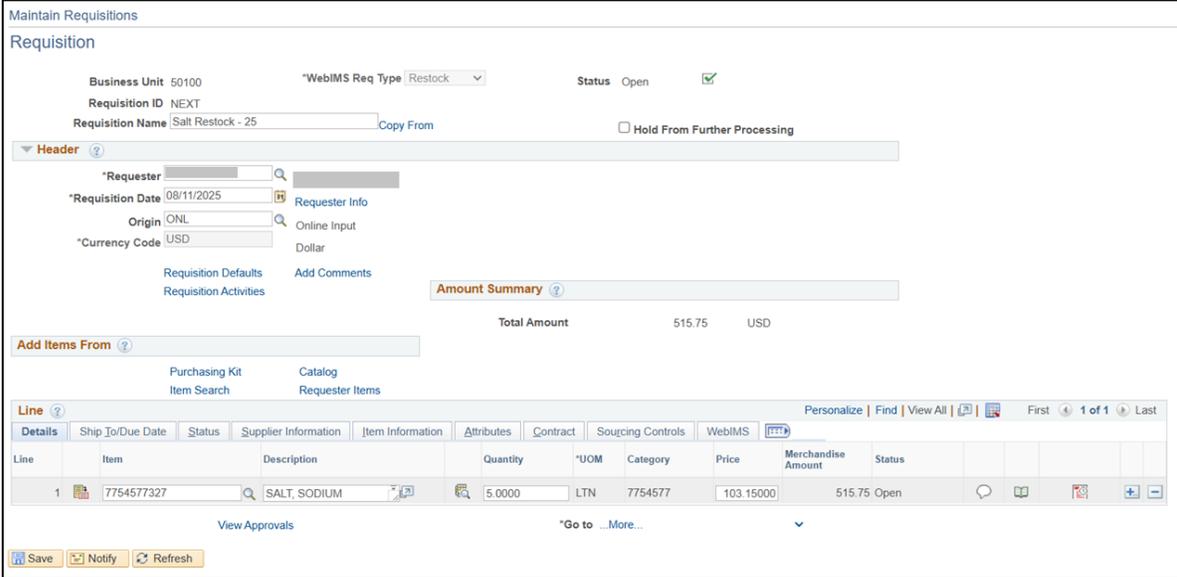
Add Ship To Comments

 Save    Notify    Refresh
 Add    Update/Display

8.	Update the <b>Ship To</b> field as needed. <b>Note:</b> This is the stock location where the inventory will be delivered. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> </tr> </thead> <tbody> <tr> <td>1</td> <td style="border: 2px solid red;">BEACH AI </td> <td>5.0000</td> <td>103.15000</td> <td>515.75</td> <td>11/05/2025 </td> <td></td> </tr> </tbody> </table> </div>	Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 	
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To									
1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 										

9.	Click the <b>Due Date Calendar</b> icon and select the desired delivery date. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>BEACH AI </td> <td>5.0000</td> <td>103.15000</td> <td>515.75</td> <td style="border: 2px solid red;">11/05/2025 </td> <td></td> </tr> </tbody> </table> </div>	Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 	
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1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 										

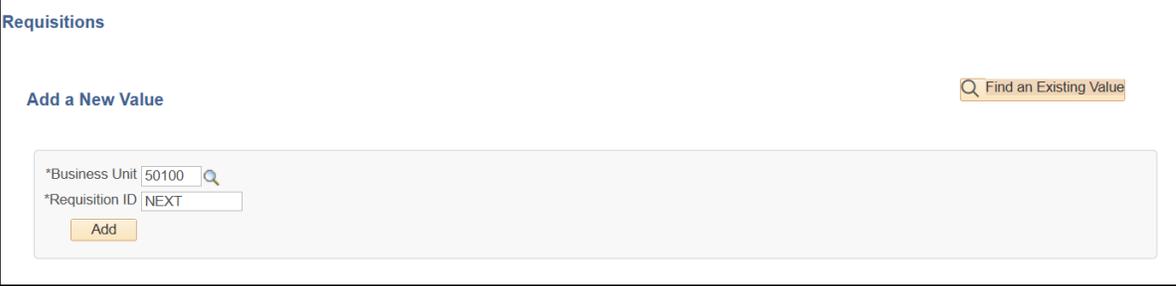
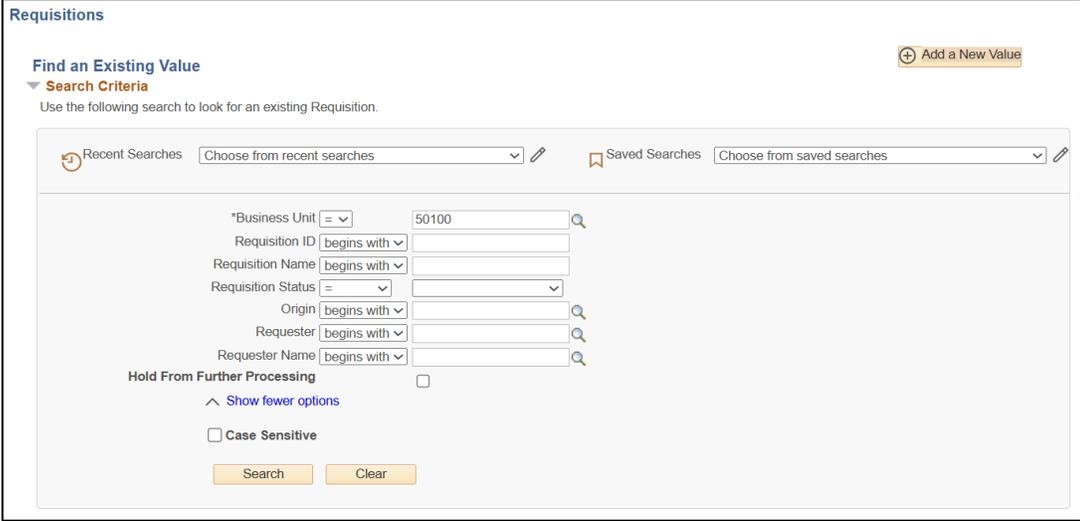
10.	Update the <b>Attention To</b> field as needed. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>BEACH AI </td> <td>5.0000</td> <td>103.15000</td> <td>515.75</td> <td>11/05/2025 </td> <td style="border: 2px solid red;"></td> </tr> </tbody> </table> </div>	Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 	
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To									
1	BEACH AI 	5.0000	103.15000	515.75	11/05/2025 										

Step	Action
	The accounting distribution will default based on the Storekeeper's user profile and cannot be changed.
11.	<p>Click the <b>Return to Main Page</b> link.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <span style="margin-right: 20px;">Requisition ID</span> <span>NEXT</span>  <span style="border: 2px solid red; padding: 2px;">Return to Main Page</span> </div>
	<p>The <b>Maintain Requisitions Requisition</b> page redisplay.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
12.	<p>Click the <b>Save</b> button.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <span style="border: 2px solid red; padding: 2px;"> Save</span> <span style="margin-left: 10px;"> Notify</span> <span style="margin-left: 10px;"> Refresh</span> </div>
	<p>The page refreshes and the system assigned Requisition ID Number displays in the <b>Requisition ID</b> field.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Business Unit 50100      *WebIMS Req Type Restock</p> <p>Requisition ID <span style="border: 2px solid red; padding: 2px;">0002418166</span></p> <p>Requisition Name Salt Restock - 25</p> </div>
13.	<p>Click the <b>Submit for Approval</b> icon.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <span>Status Open</span> <span style="margin-left: 20px;"><span style="border: 2px solid red; padding: 2px;"></span> </span> </div>

Step	Action
14.	<p>The <b>Status</b> field updates to “Pending” and the <b>Submit for Approval</b> icon no longer displays.</p> 
	<p>The Restock Requisition will follow the normal Requisition approval process. However, it must be approved by the Procurement Manager before it is updated in WebIMS.</p> <p>Upon approval, the WebIMS Item Number, Location Number, quantity, and Document IDs will be sent to WebIMS to update the quantity on order.</p>

### Canceling a Restock Requisition

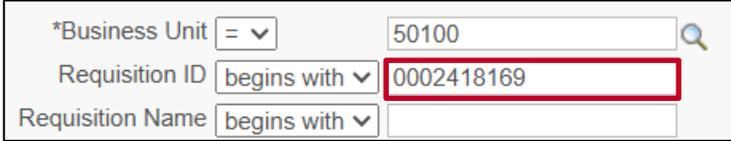
A Restock Requisition is canceled the same way as a regular Requisition. A Requisition that has been sourced to a Purchase Order cannot be canceled.

Step	Action
1.	Navigate to the <b>Requisitions Add a New Value</b> page using the following path: <b>Main Menu &gt; Purchasing &gt; Requisitions &gt; Add/Update Requisitions</b>
<p>The <b>Requisitions Add a New Value</b> page displays.</p> 	
2.	Click the <b>Find an Existing Value</b> button. 
<p>The <b>Requisitions Find an Existing Value Search</b> page displays.</p> 	
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled <b>Overview of the Cardinal FIN Search Pages</b> . This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .

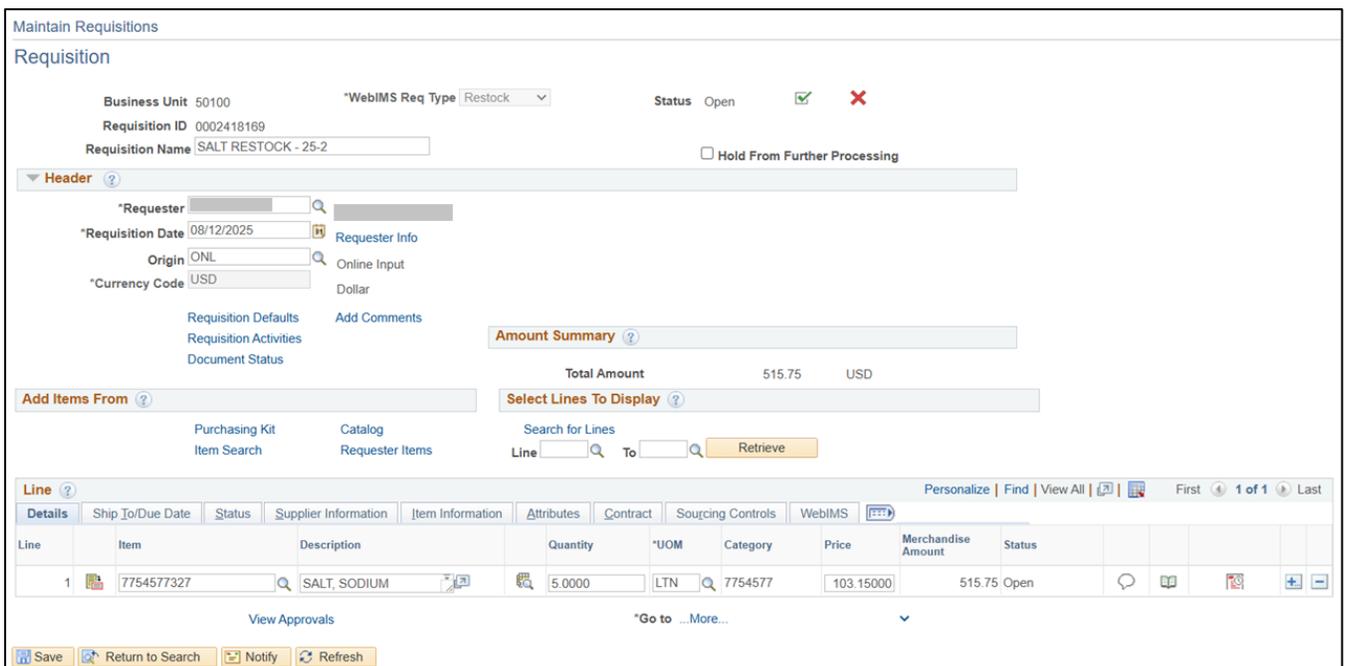


# Cardinal Procurement Job Aid

## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

Step	Action
3.	Enter the applicable Requisition ID Number in the <b>Requisition ID</b> field. 
4.	Click the <b>Search</b> button. 

The **Maintain Requisitions Requisition** page displays.



Maintain Requisitions  
Requisition

Business Unit 50100 \*WebIMS Req Type Restock Status Open  
Requisition ID 0002418169  
Requisition Name SALT RESTOCK - 25-2

Header  
\*Requester  
\*Requisition Date 08/12/2025  
Origin ONL  
\*Currency Code USD

Amount Summary  
Total Amount 515.75 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7754577327	SALT, SODIUM	5.0000	LTN	7754577	103.15000	515.75	Open

5.	Click the <b>Cancel</b> icon. 
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Step	Action
	<p>The <b>Successful Cancellation</b> page displays in a pop-up window.</p> <div data-bbox="230 436 1425 814" style="border: 1px solid black; padding: 10px;"> <p><b>Successful Cancellation</b></p> <p>The requisition cancellation was successful.</p> <p style="text-align: center;"><input type="button" value="Ok"/></p> <p> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> </p> </div>
	<p>WebIMS is not automatically updated when a Restock Requisition is canceled. The Storekeeper must manually update the quantity on order in WebIMS.</p>

### Viewing Restock Purchase Orders

Restock Purchase Orders are sourced by Buyers just like regular Purchase Orders.

Both Storekeepers and Buyers can view Restock Purchase Orders to check their status. However, the way they are viewed is determined by the user role.

#### Storekeeper View

Step	Action
1.	Navigate to the <b>Purchase Order Inquiry</b> page using the following path: <b>Purchasing &gt; Purchase Orders &gt; Review PO Information &gt; Purchase Orders</b>
<p>The <b>Purchase Order Inquiry Find an Existing Value Search</b> page displays.</p> <div data-bbox="207 800 1443 1509" style="border: 1px solid black; padding: 10px;"> <p><b>Purchase Order Inquiry</b></p> <p><b>Find an Existing Value</b></p> <p>▼ <b>Search Criteria</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Recent Searches <input type="text" value="Choose from recent searches"/> </p> <p>Saved Searches <input type="text" value="Choose from saved searches"/> </p> </div> <p>*Business Unit <input type="text" value="50100"/> </p> <p>PO ID <input type="text" value="begins with"/> </p> <p>Contract SetID <input type="text" value="begins with"/> </p> <p>Contract ID <input type="text" value="begins with"/> </p> <p>Release Number <input type="text" value=""/> </p> <p>Purchase Order Date <input type="text" value=""/> </p> <p>PO Status <input type="text" value=""/> </p> <p>Short Supplier Name <input type="text" value="begins with"/> </p> <p>Supplier ID <input type="text" value="begins with"/> </p> <p>Supplier Name <input type="text" value="begins with"/> </p> <p>Buyer <input type="text" value="begins with"/> </p> <p>Buyer Name <input type="text" value="begins with"/> </p> <p><a href="#">^ Show fewer options</a></p> <p><input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> </div>	
	<p>For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled <b>Overview of the Cardinal FIN Search Pages</b>. This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b>.</p>
2.	Enter the applicable Purchase Order Number in the <b>PO ID</b> field. <div data-bbox="256 1730 1110 1856" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>*Business Unit <input type="text" value="50100"/> </p> <p>PO ID <input type="text" value="0001306716"/> </p> </div>

## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

Step	Action																																					
3.	<p>Click the <b>Search</b> button.</p> <div data-bbox="256 436 678 520" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px;">Search</div> <div style="padding: 2px 10px;">Clear</div> </div> </div>																																					
	<p>The <b>Purchase Order Inquiry Purchase Order</b> page displays.</p> <div data-bbox="224 604 1425 1213" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Purchase Order Inquiry Purchase Order</p> <p>Business Unit 50100 PO Status Dispatched PO ID 0001306716</p> <hr/> <p><b>Header</b></p> <p>PO Date 08/15/2025 Backorder Status Not Backordered Supplier Name <u>CARGILL, INC.</u> Receipt Status Not Recvd Supplier ID 0000015454 <a href="#">Supplier Details</a> <input type="checkbox"/> Hold From Further Processing Buyer <span style="background-color: #ccc; padding: 0 5px;"> </span> PO Reference SALT RESTOCK 25-4 <b>Amount Summary</b></p> <p style="margin-left: 20px;">Header Details Activity Summary Merchandise 515.75 All RTV Header Comments Freight/Tax/Misc. 0.00 Matching Document Status Total 515.75 USD <a href="#">Actions</a></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="8">Lines</th> <th colspan="2" style="text-align: right;">Personalize   Find   View All</th> <th style="text-align: right;">First</th> <th style="text-align: center;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> <tr> <th>Line</th> <th>Item ID</th> <th>Item Description</th> <th>Category</th> <th>PO Qty</th> <th>UOM</th> <th>Merchandise Amount</th> <th>Status</th> <th colspan="4"></th> </tr> </thead> <tbody> <tr> <td>1</td> <td> 7754577327</td> <td>SALT, SODIUM CHLORIDE, FOR ROA</td> <td>7754577</td> <td>5.0000</td> <td>LTN</td> <td>515.75 USD</td> <td>Approved</td> <td colspan="4"></td> </tr> </tbody> </table> <p><a href="#">View Approvals</a></p> <p><a href="#">Return to Search</a> <a href="#">Notify</a> <span style="float: right;"><a href="#">Related Links</a></span></p> </div>	Lines								Personalize   Find   View All		First	1 of 1	Last	Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status					1	7754577327	SALT, SODIUM CHLORIDE, FOR ROA	7754577	5.0000	LTN	515.75 USD	Approved				
Lines								Personalize   Find   View All		First	1 of 1	Last																										
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1	7754577327	SALT, SODIUM CHLORIDE, FOR ROA	7754577	5.0000	LTN	515.75 USD	Approved																															
4.	Review the information as needed.																																					
	<p>The <b>WebIMS?</b> checkbox is selected for all Restock Purchase Orders. However, it can only be seen on the <b>Add/Update POs</b> page.</p>																																					



# Cardinal Procurement Job Aid

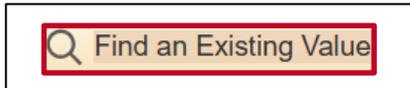
## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

### Buyer View

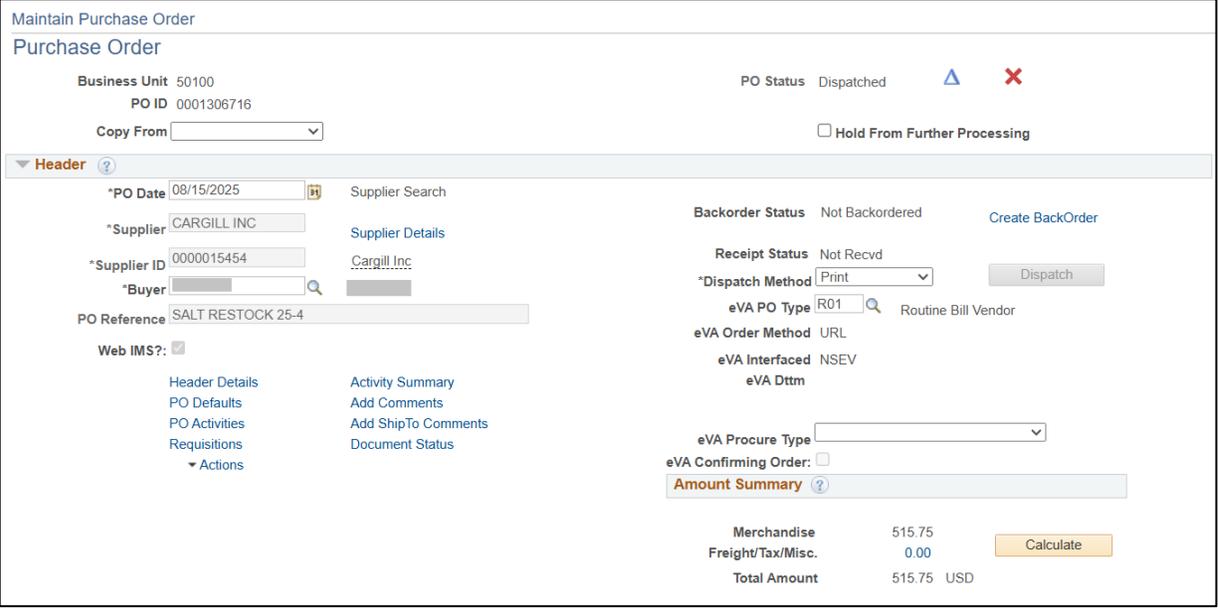
Step	Action
1.	Navigate to the <b>Purchase Order Add a New Value</b> page using the following path: <b>Main Menu &gt; Purchasing &gt; Purchase Orders &gt; Add/Update POs</b>

The **Purchase Order Add a New Value** page displays.

- Click the **Find an Existing Value** button.



The **Purchase Order Find an Existing Value Search** page displays.

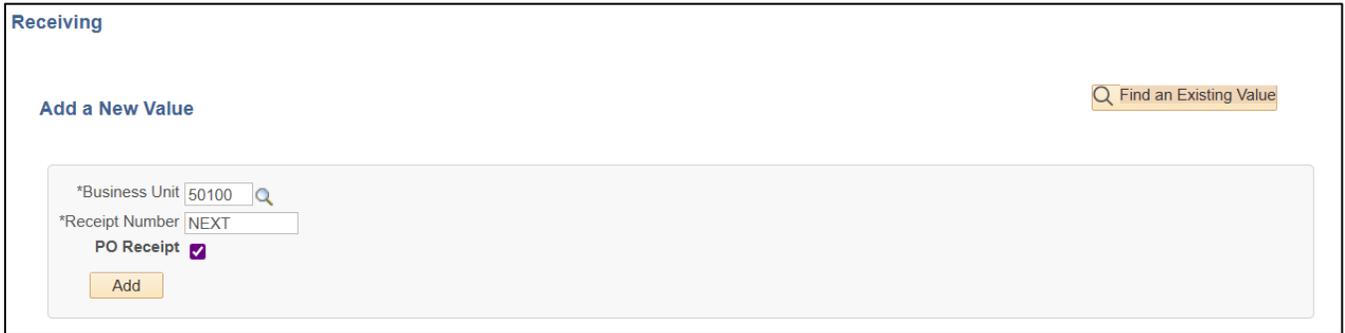
Step	Action
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3.	Enter the applicable Purchase Order Number in the <b>PO ID</b> field. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>*Business Unit = <span style="border: 1px solid #ccc; padding: 2px;">v</span></p> <p>PO ID <span style="border: 1px solid #ccc; padding: 2px;">begins with v</span></p> </div> <div style="text-align: right;"> <p style="border: 1px solid #ccc; padding: 2px; width: 150px;">50100</p> <p style="border: 2px solid red; padding: 2px; width: 150px;">0001306716</p> </div> <div style="text-align: right; margin-right: 10px;">  </div> </div> </div>
4.	Click the <b>Search</b> button. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0; text-align: center;"> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #f0f0f0;">Search</div> <div style="padding: 5px 15px; background-color: #f0f0f0;">Clear</div> </div> </div>
The <b>Maintain Purchase Order Purchase Order</b> page displays. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div>	
5.	Review the information as needed.
	The <b>WebIMS?</b> checkbox is selected for all Restock Purchase Orders. A Buyer can see this checkbox but cannot edit it. <div style="border: 2px solid red; padding: 5px; margin: 10px 0; text-align: center;"> <b>Web IMS?:</b> <input checked="" type="checkbox"/> </div>

### Creating a Restock Receipt

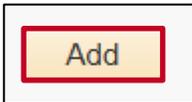
Creating a Restock Receipt for the goods when they are received is similar to creating a regular Receipt. The difference between a Restock Receipt and regular Receipt is that Cardinal creates a WebIMS Receipt Doc ID for each Line of the Restock Receipt and updates the Receipt information to WebIMS. For more information on creating and processing Receipts, see the Web-Based Training course titled **PR349 Managing Receiving**.

Step	Action
1.	Navigate to the <b>Receiving Add a New Value</b> page using the following path: <b>Main Menu &gt; Purchasing &gt; Receipts &gt; Add/Update Receipts</b>

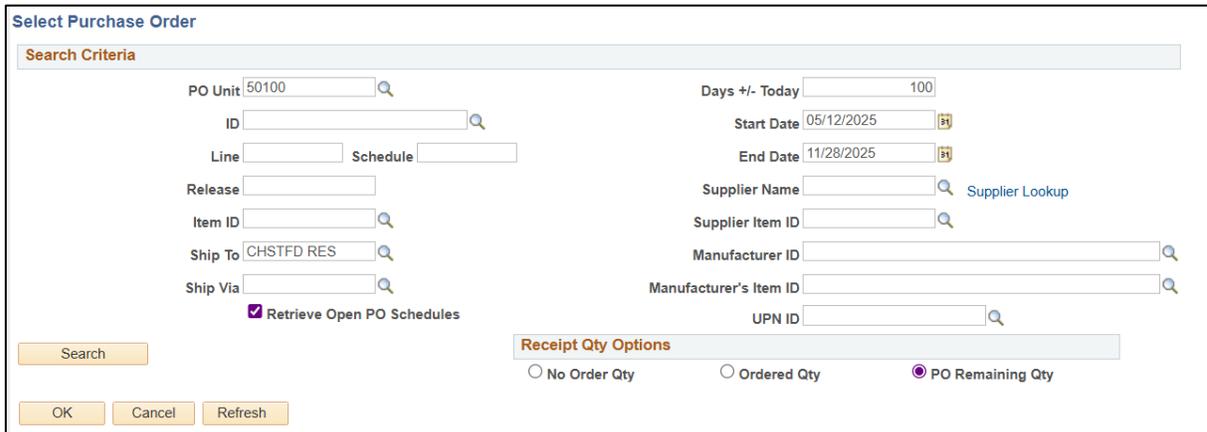
The **Receiving Add a New Value** page displays.



2.	Click the <b>Add</b> button.
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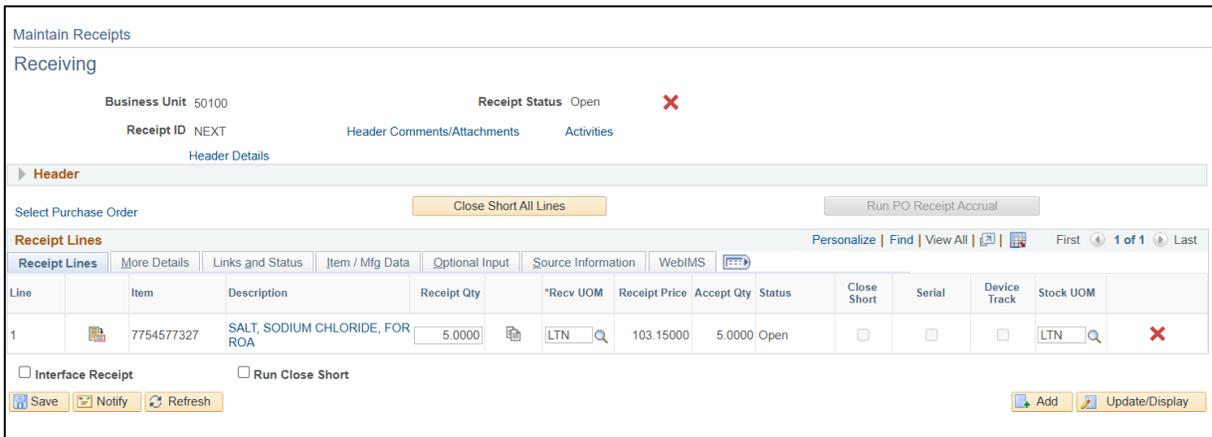
The **Select Purchase Order** page displays.



Step	Action																																	
3.	Enter the applicable Purchase Order Number in the <b>ID</b> field. <div data-bbox="256 436 1140 856" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>PO Unit <input type="text" value="50100"/> </p> <p>ID <input style="border: 2px solid red;" type="text" value="0001306716"/> </p> <p>Line <input type="text"/> Schedule <input type="text"/></p> <p>Release <input type="text"/></p> <p>Item ID <input type="text"/> </p> <p>Ship To <input type="text" value="BEACH AHQ"/> </p> </div>																																	
	The <b>Ship To</b> field automatically populates with the user's default Ship To location. This field may need to be cleared or updated before searching.																																	
4.	Click the <b>Search</b> button. <div data-bbox="256 1056 599 1142" style="border: 1px solid black; padding: 10px; margin-top: 10px; text-align: center;"> <input style="border: 2px solid red;" type="button" value="Search"/> </div>																																	
The page refreshes and the <b>Retrieved Rows</b> section displays at the bottom of the page.																																		
<div data-bbox="159 1230 1495 1470" style="border: 1px solid black; padding: 10px;"> <p><b>Retrieved Rows</b> <span style="float: right;">Personalize   Find   View All     First <span style="margin: 0 5px;">1 of 1</span> Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Selected Rows</th> <th style="width: 10%;">Shipping Related</th> <th style="width: 15%;">More Details</th> <th colspan="8"></th> </tr> <tr> <th>Sel</th> <th>PO Unit</th> <th>PO ID</th> <th>Line</th> <th>Sched</th> <th>Release</th> <th>Due Date</th> <th>PO Qty</th> <th>Prior Receipt</th> <th>Item</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>50100</td> <td>0001306716</td> <td>1</td> <td>1</td> <td></td> <td>08/21/2025</td> <td>5.0000</td> <td></td> <td>7754577327</td> <td>SALT, SODIUM CHLORIDE, FOR ROA</td> </tr> </tbody> </table> <p><input checked="" type="checkbox"/> Select All <span style="margin-left: 100px;"><input type="checkbox"/> Clear All</span></p> </div>		Selected Rows	Shipping Related	More Details									Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description	<input type="checkbox"/>	50100	0001306716	1	1		08/21/2025	5.0000		7754577327	SALT, SODIUM CHLORIDE, FOR ROA
Selected Rows	Shipping Related	More Details																																
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<input type="checkbox"/>	50100	0001306716	1	1		08/21/2025	5.0000		7754577327	SALT, SODIUM CHLORIDE, FOR ROA																								
5.	Select the <b>Sel</b> (Select) checkbox option for the Purchase Order Line to receive. <div data-bbox="256 1554 740 1722" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Sel</th> <th style="width: 20%;">PO Unit</th> <th style="width: 25%;">PO ID</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" style="border: 2px solid red;" type="checkbox" value=""/></td> <td>50100</td> <td>0001306716</td> </tr> </tbody> </table> </div>	Sel	PO Unit	PO ID	<input checked="" style="border: 2px solid red;" type="checkbox" value=""/>	50100	0001306716																											
Sel	PO Unit	PO ID																																
<input checked="" style="border: 2px solid red;" type="checkbox" value=""/>	50100	0001306716																																

Step	Action
6.	Click the <b>OK</b> button. 

The **Maintain Receipts Receiving** page displays.



Maintain Receipts Receiving

Business Unit 50100 Receipt Status Open ✘

Receipt ID NEXT Header Comments/Attachments Activities

Header Details

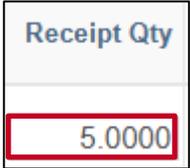
Select Purchase Order Close Short All Lines Run PO Receipt Accrual

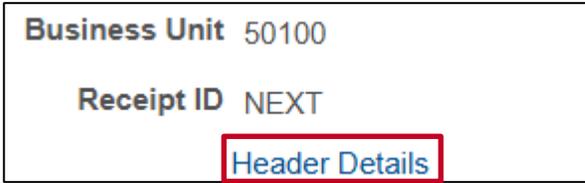
Receipt Lines Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM
1	7754577327	SALT, SODIUM CHLORIDE, FOR ROA	5.0000	LTN	103.15000	5.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LTN <span style="color: red;">✘</span>

Interface Receipt  Run Close Short

Save Notify Refresh Add Update/Display

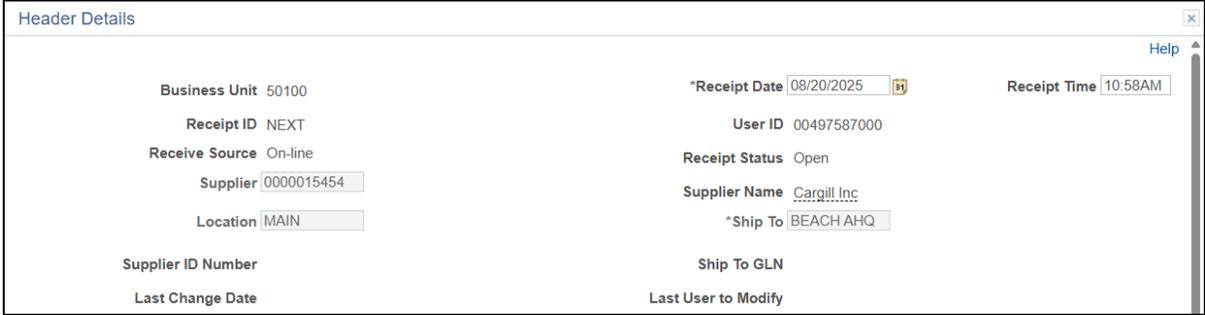
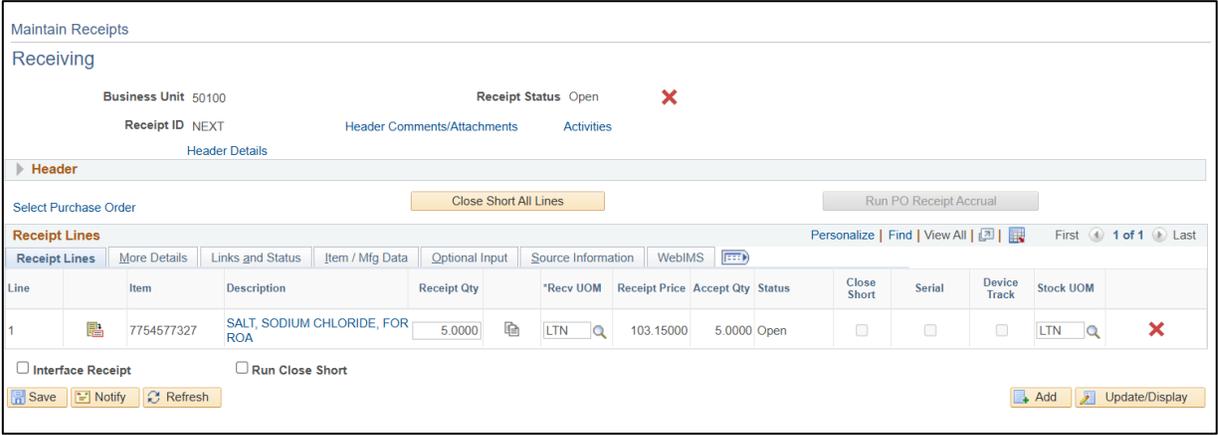
7.	Enter the quantity received in the <b>Receipt QTY</b> field. 
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8.	Click the <b>Header Details</b> link. 
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# Cardinal Procurement Job Aid

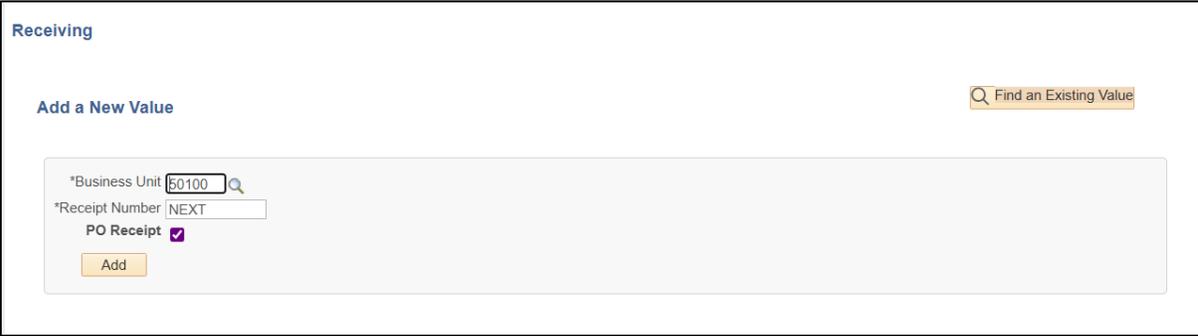
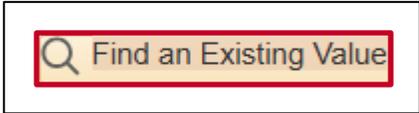
## PR347 Managing Inventory Restock Requisitions and Receipts (VDOT Only)

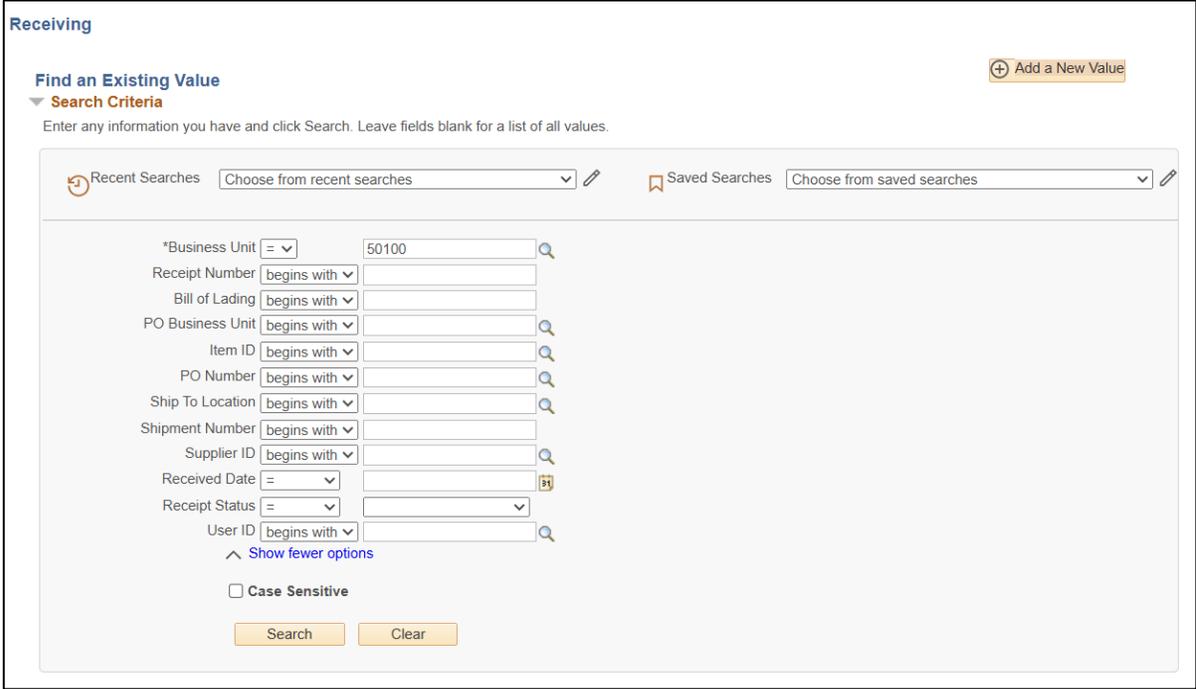
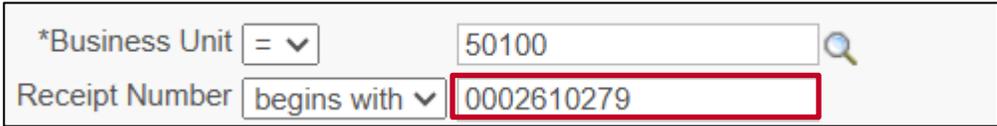
Step	Action
	<p>The <b>Header Details</b> page displays.</p> 
9.	<p>Click the <b>Receipt Date Calendar</b> icon and select the actual date the goods were received.</p> 
10.	<p>Click the <b>OK</b> button.</p> 
	<p>The <b>Maintain Receipts Receiving</b> page redisplay.</p> 
11.	<p>Click the <b>Save</b> button.</p> 

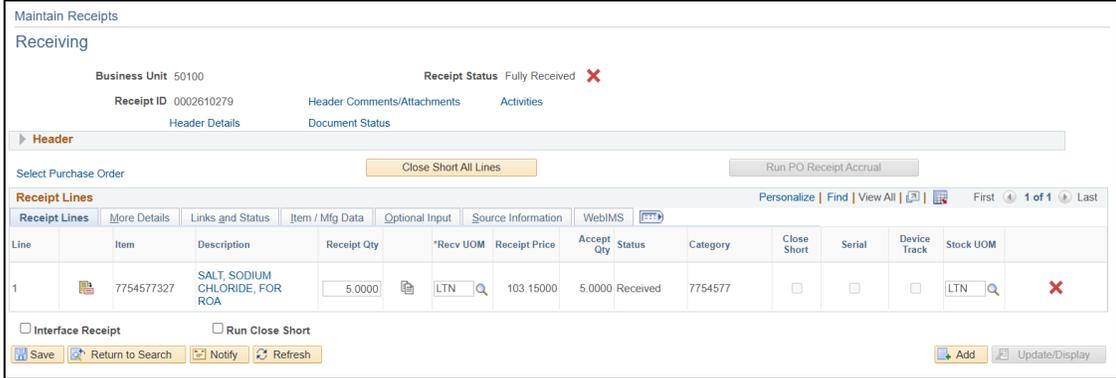
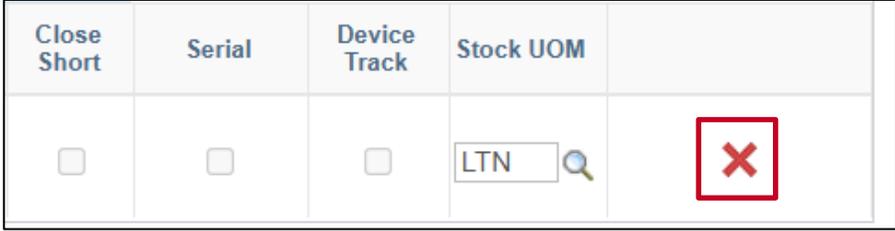
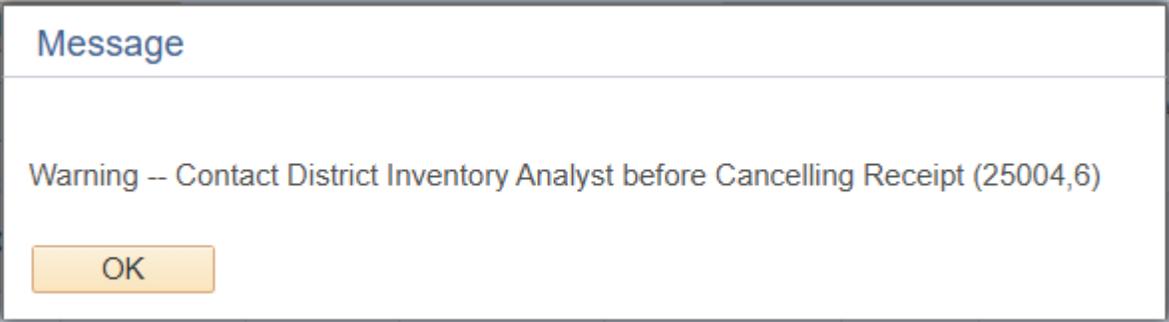
Step	Action																
	<p>Cardinal completes a three-step process:</p> <ol style="list-style-type: none"> <li>Generates a Receipt ID Number, visible in the Receipt Header.           <div data-bbox="354 472 857 625" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Business Unit</b> 50100</p> <p><b>Receipt ID</b> <span style="border: 2px solid red; padding: 2px;">0002610279</span></p> </div> </li> <li>Generates a WebIMS Receipt Doc ID for each Receipt Line, visible on the <b>WebIMS</b> tab.           <div data-bbox="354 697 1474 861" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4" style="text-align: right;">Personalize   Find   View All     First <span style="margin: 0 5px;">1 of 1</span> Last</th> </tr> <tr> <th style="width: 25%;">Item / Mfg Data</th> <th style="width: 25%;">Optional Input</th> <th style="width: 25%;">Source Information</th> <th style="width: 25%;"><b>WebIMS</b> </th> </tr> <tr> <th>Description</th> <th>WebIMS PO</th> <th colspan="2">WebIMS Receipt Doc ID</th> </tr> </thead> <tbody> <tr> <td>SALT, SODIUM CHLORIDE, FOR ROA</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td colspan="2" style="text-align: center;"><span style="border: 2px solid red; padding: 2px;">R000106354</span></td> </tr> </tbody> </table> </div> </li> <li>Sends the Receipt information to WebIMS.</li> </ol>	Personalize   Find   View All     First <span style="margin: 0 5px;">1 of 1</span> Last				Item / Mfg Data	Optional Input	Source Information	<b>WebIMS</b> 	Description	WebIMS PO	WebIMS Receipt Doc ID		SALT, SODIUM CHLORIDE, FOR ROA	<input checked="" type="checkbox"/>	<span style="border: 2px solid red; padding: 2px;">R000106354</span>	
Personalize   Find   View All     First <span style="margin: 0 5px;">1 of 1</span> Last																	
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SALT, SODIUM CHLORIDE, FOR ROA	<input checked="" type="checkbox"/>	<span style="border: 2px solid red; padding: 2px;">R000106354</span>															

### Canceling a Restock Receipt

A Restock Receipt can be canceled at the Line level as long as it has not been vouchered (i.e., sent for payment). Once the goods have been received and a Voucher has been created, the Line cannot be canceled. Once canceled, the information is sent to WebIMS. Do not cancel the entire Receipt by clicking the **Cancel** icon at the Header level. Each applicable Line must be canceled at the Line level.

Step	Action
1.	Navigate to the <b>Receiving Add a New Value</b> page using the following path: <b>Main Menu &gt; Purchasing &gt; Receipts &gt; Add/Update Receipts</b>
<p>The <b>Receiving Add a New Value</b> page displays.</p> <div data-bbox="227 783 1425 1119" style="border: 1px solid black; padding: 10px;">  </div>	
2.	Click the <b>Find an Existing Value</b> button. <div data-bbox="256 1207 675 1320" style="border: 1px solid black; padding: 5px; margin-top: 10px;">  </div>

Step	Action
	<p>The <b>Receiving Find an Existing Value Search</b> page displays.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
	<p>For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled <b>Overview of the Cardinal FIN Search Pages</b>. This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b>.</p>
3.	<p>Enter the applicable Receipt Number in the <b>Receipt Number</b> field.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
4.	<p>Click the <b>Search</b> button.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>

Step	Action
	<p>The <b>Maintain Receipts Receiving</b> page displays.</p> 
5.	<p>Click the <b>Cancel</b> icon associated with the Line to be canceled.</p> 
	<p>Do not cancel the entire Receipt by clicking the <b>Cancel</b> icon at the Header level.</p>
	<p>A <b>Message</b> displays in a pop-up window advising the user to contact the District Inventory Analyst before canceling the Receipt. It is important to contact this individual to ensure that none of the canceled stock delivery has been issued from WebIMS.</p> 
6.	<p>Click the <b>OK</b> button.</p> 

Step	Action								
	<p>A <b>Message</b> displays in a pop-up window advising the user that canceling an Item cannot be reversed.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> <p><b>Message</b></p> <p>Canceling Item cannot be reversed. Do you wish to continue? (10300,46)</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div>								
7.	<p>Click the <b>Yes</b> button.</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <input style="border: 2px solid red;" type="button" value="Yes"/> <input type="button" value="No"/> </div>								
	<p>The <b>Maintain Receipts Receiving</b> page redisplay and the <b>Status</b> field for the canceled Line is updated to "Canceled".</p> <table border="1" style="margin: 10px auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 25%;">Receipt Price</th> <th style="width: 25%;">Accept Qty</th> <th style="width: 25%;">Status</th> <th style="width: 25%;">Category</th> </tr> </thead> <tbody> <tr> <td>103.15000</td> <td></td> <td style="border: 2px solid red;">Canceled</td> <td>7754577</td> </tr> </tbody> </table>	Receipt Price	Accept Qty	Status	Category	103.15000		Canceled	7754577
Receipt Price	Accept Qty	Status	Category						
103.15000		Canceled	7754577						
8.	<p>Click the <b>Save</b> button.</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <input style="border: 2px solid red;" type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> </div>								
	<p>The page refreshes and if all Lines on the Receipt have been canceled, the <b>Receipt Status</b> field is updated to "Canceled".</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> <p><b>Receipt Status</b> <span style="border: 2px solid red; padding: 2px;">Canceled</span> <span style="color: red; font-size: 2em; margin-left: 10px;">✕</span></p> </div>								
	<p>Once canceled, the information is sent to and updated in WebIMS.</p>								