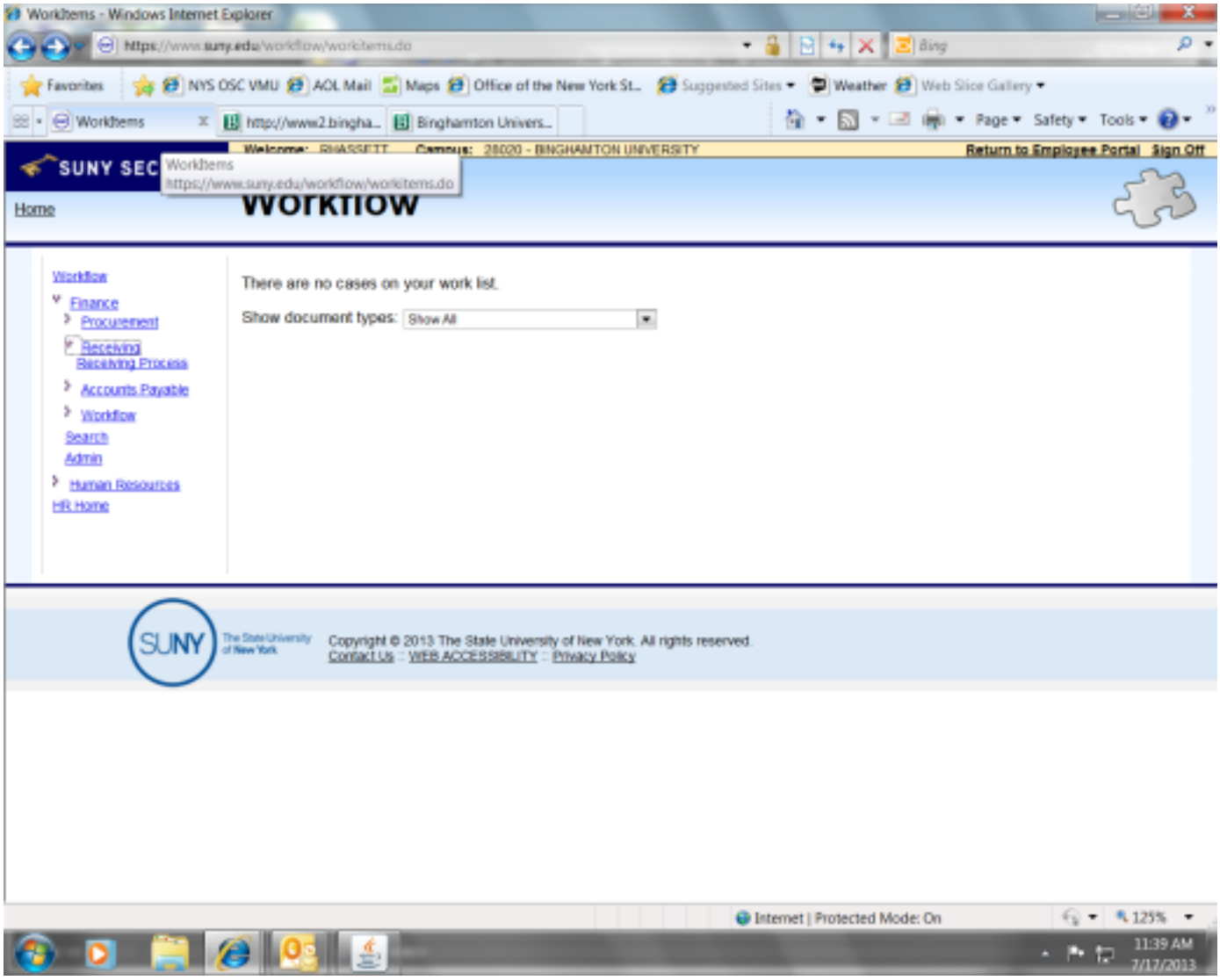
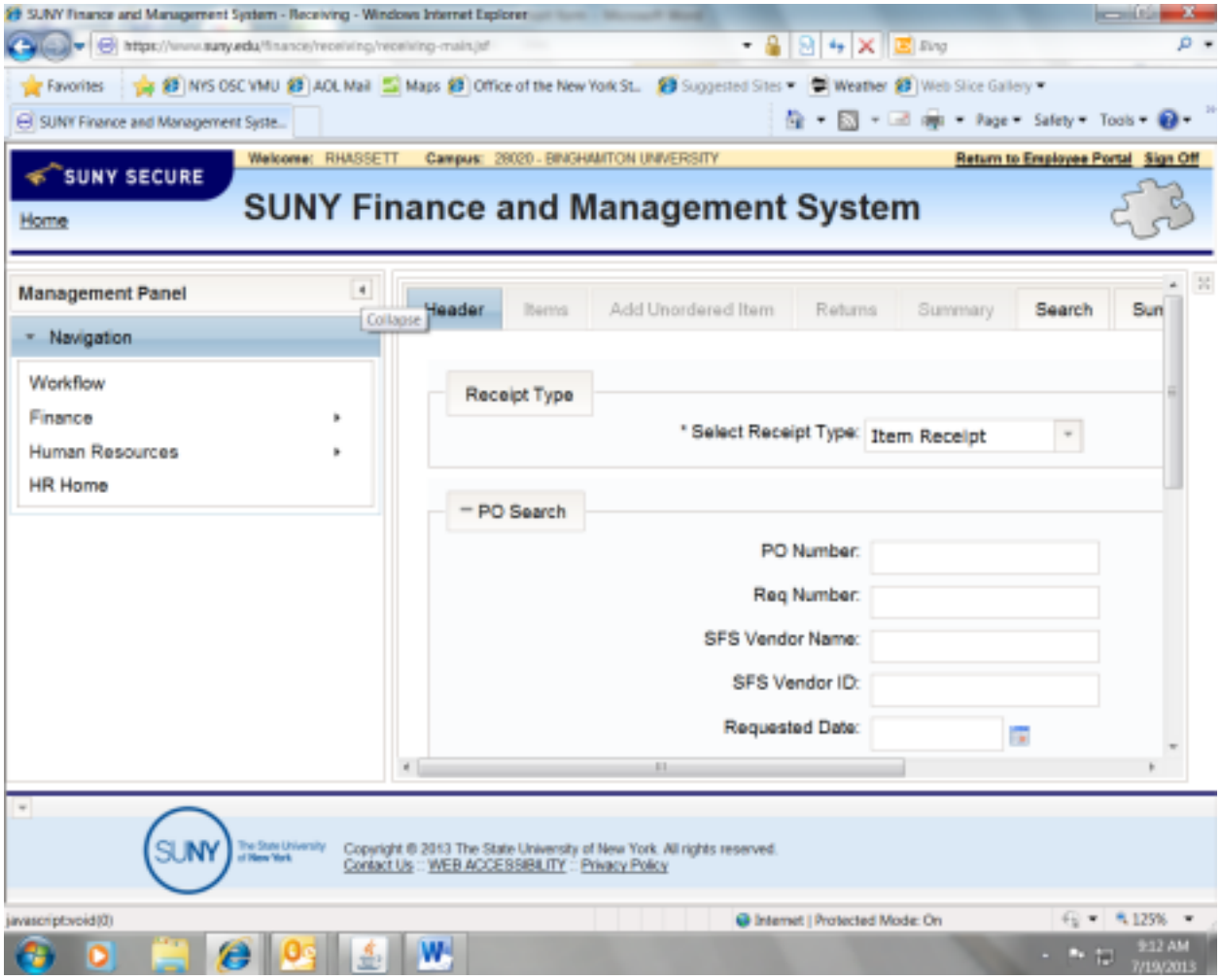
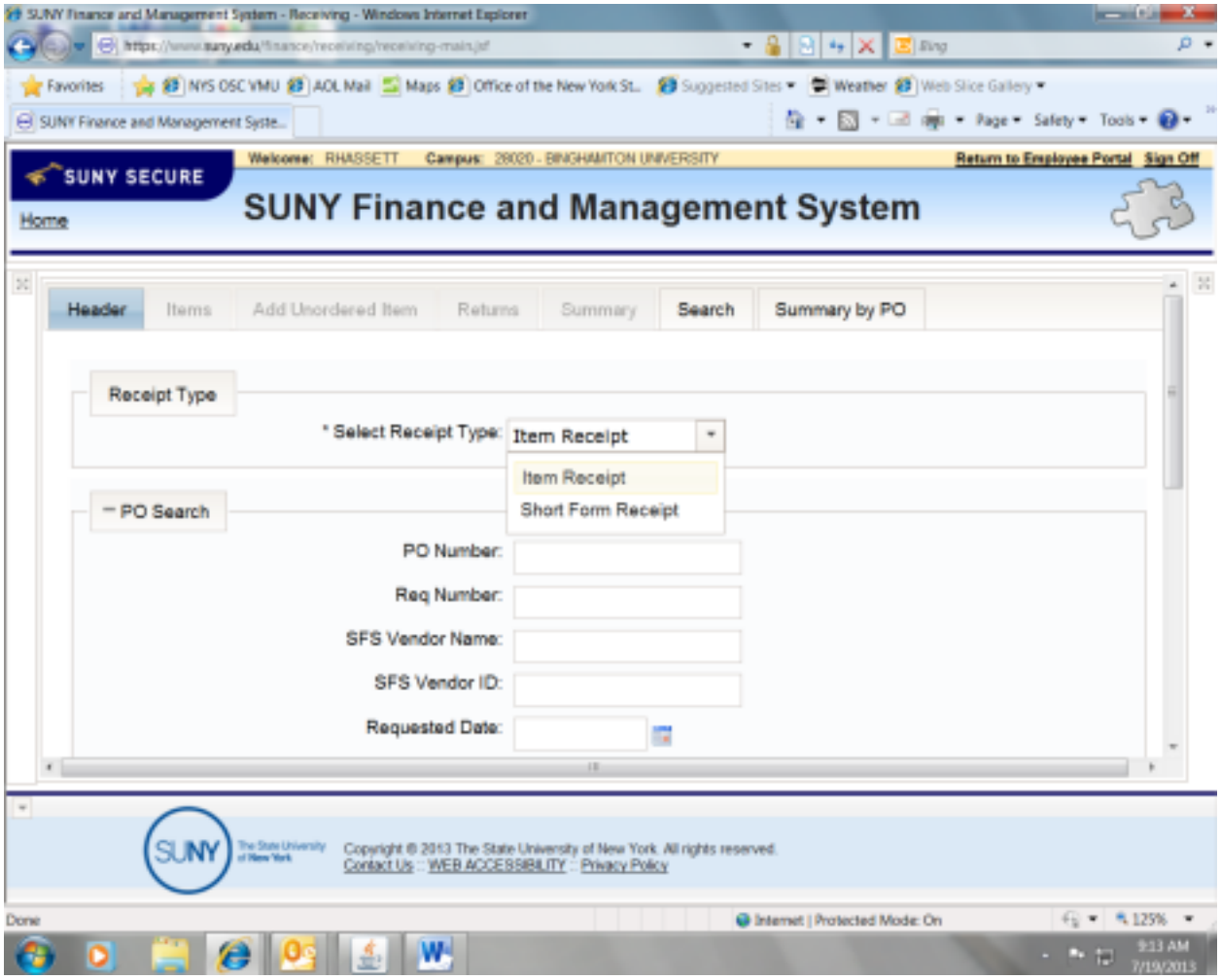
Creating a Short Form Receipt



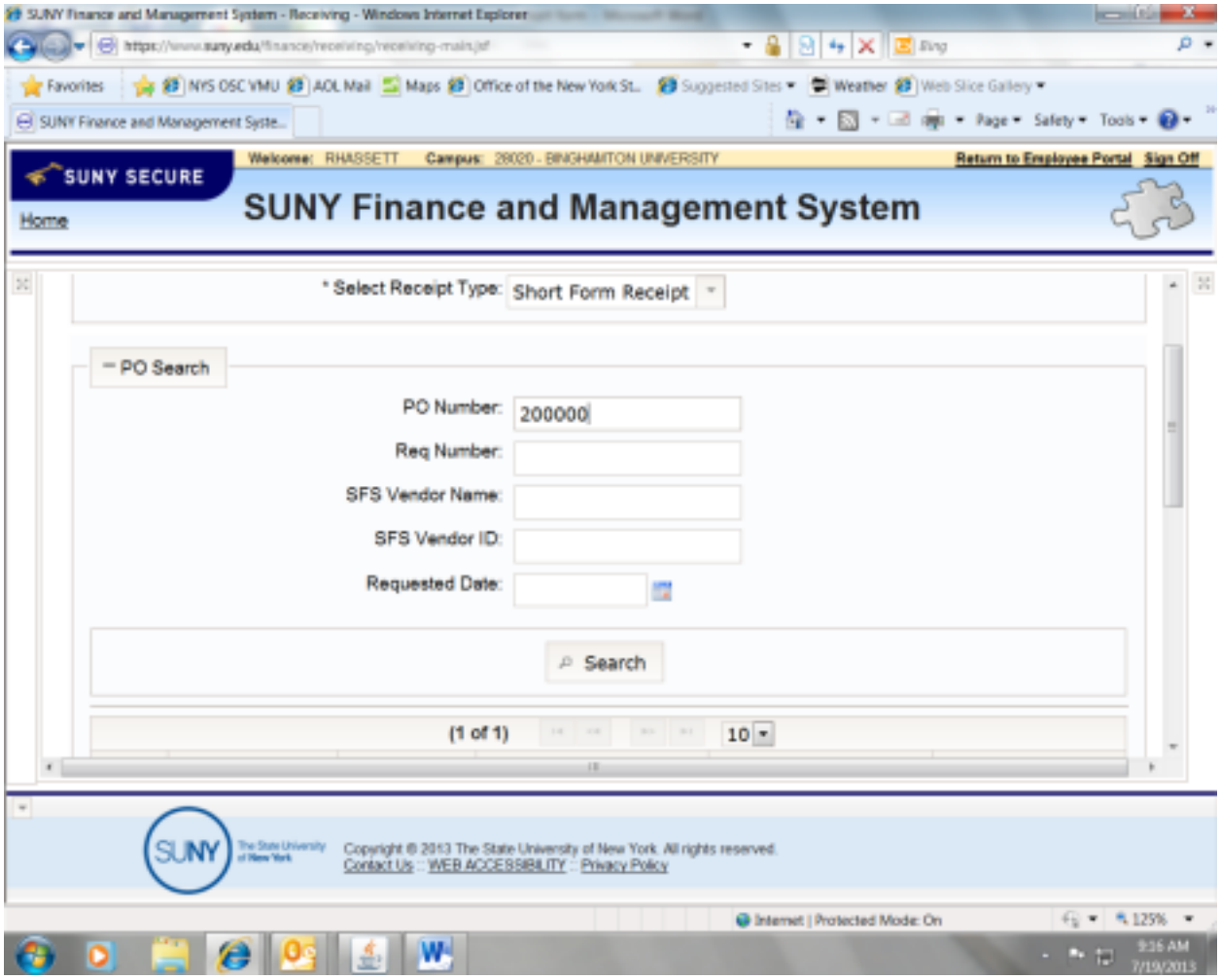
Sign in to the BU Business System, get to your workflow, click on Finance, Receiving and finally Receiving process.



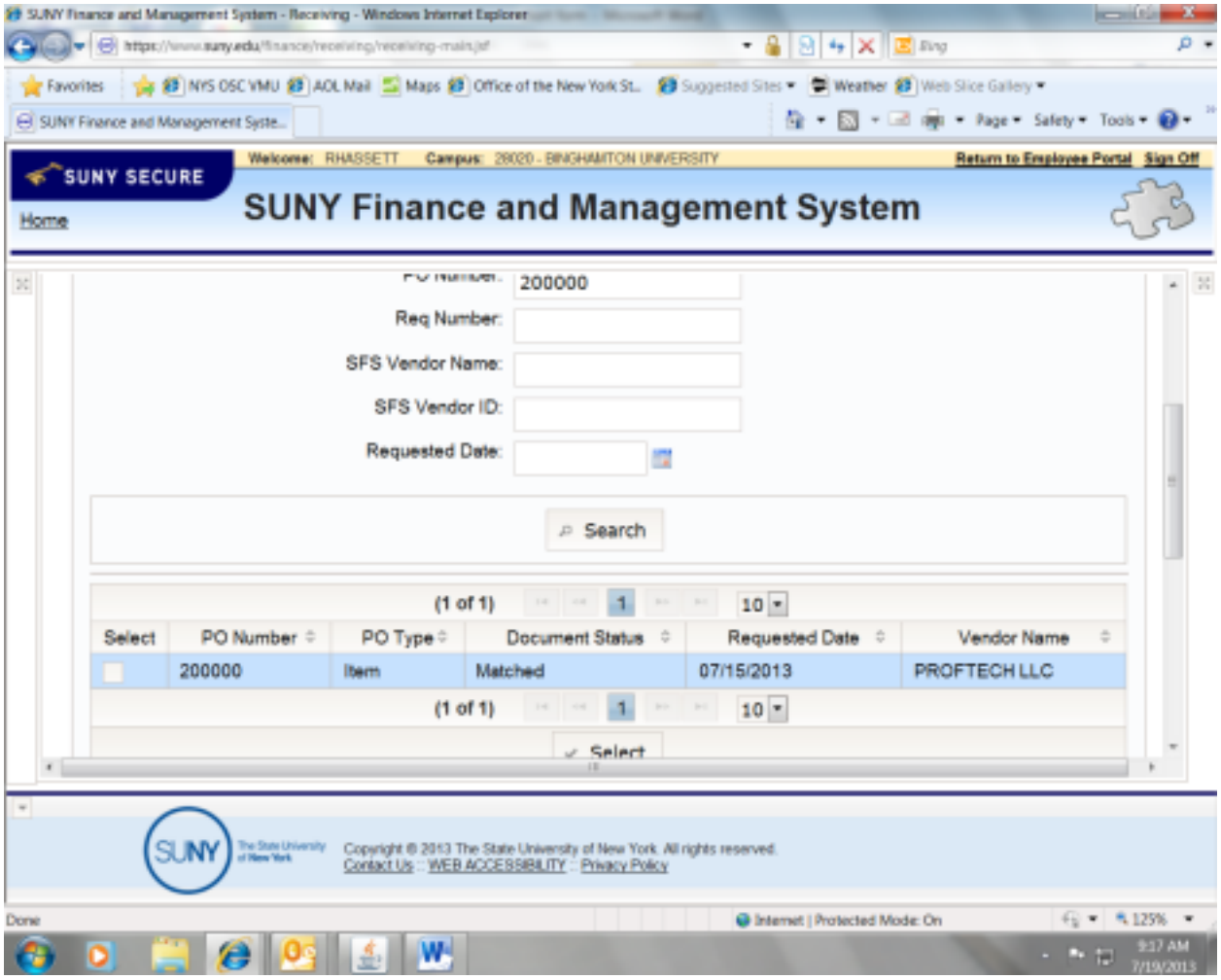
Click the left arrow next to the Management Panel to collapse the screen so you get a better view of the receipt.



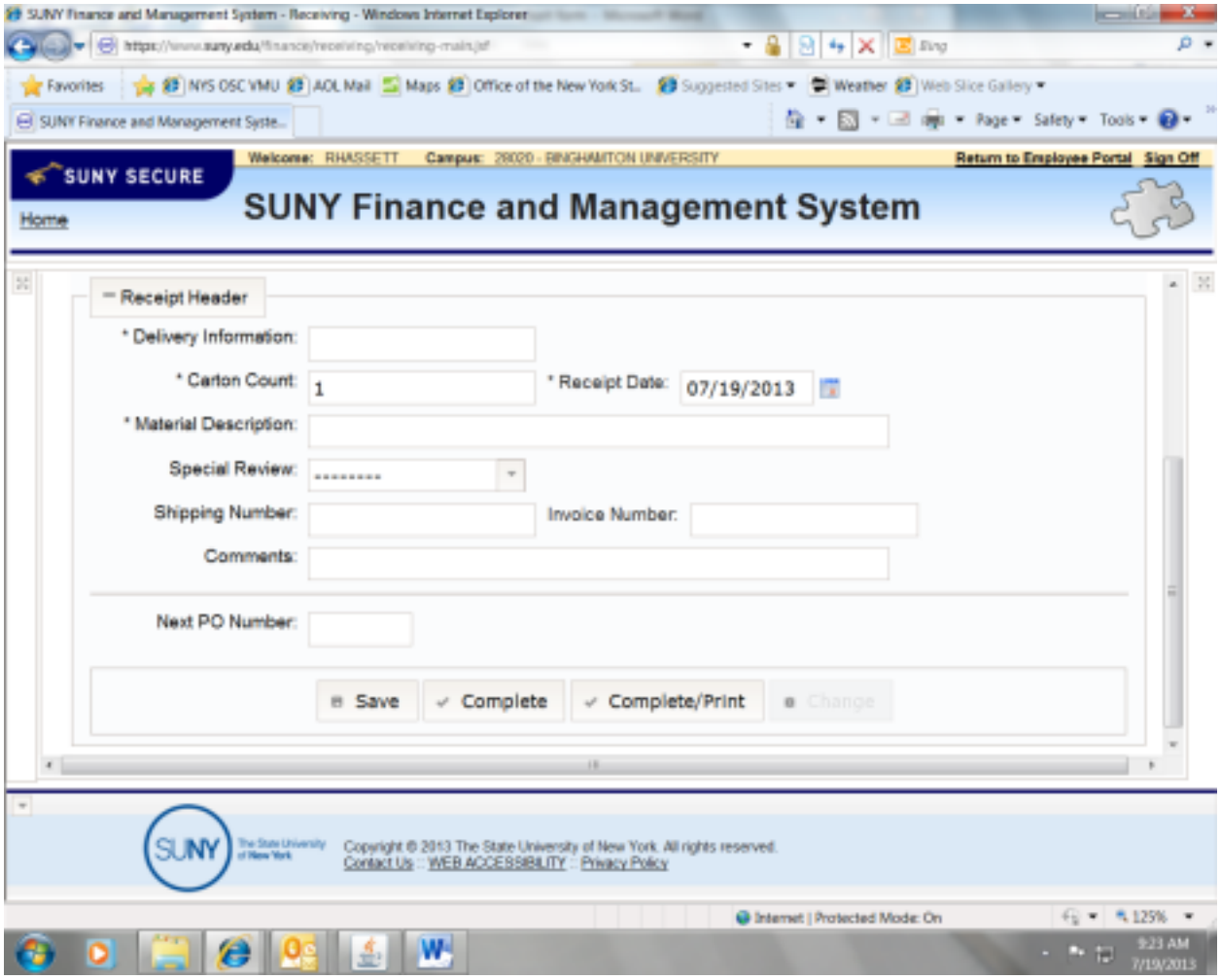
Select Receipt Type—click on the drop down and choose short form receipt. Processing will appear on the screen. The screen will go gray and take you to the PO Search.



Enter your PO number, click search. Processing will appear on the screen. The screen will go gray again while grabbing your PO information.



Your PO will appear under the search. Click in the white Select box, then click the Select box under the PO. Again, Processing will populate, the screen will go gray while selecting your PO.



Time to create your receipt! Fill in the following information:

Delivery Information: Employee Name-who received the item(s).

Carton Count: this field values for you.

Receipt Date: Defaults to the date you are creating the receipt. Please put the date that you received the item.

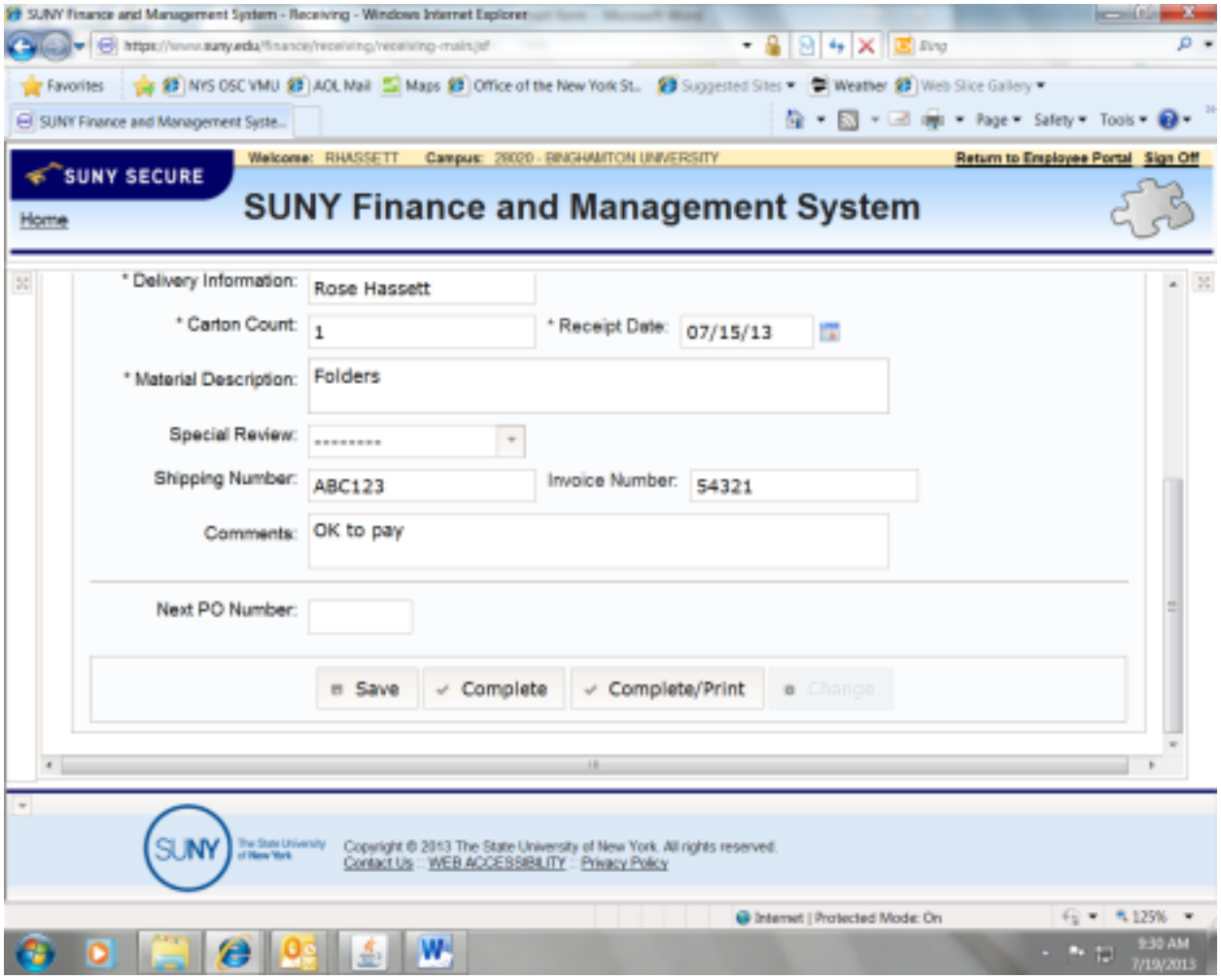
Material Description: this field can only hold 30 characters so be very concise with field…what is

it? **Special Review**: do not value this field

Shipping Number: from packing slip, if available

Invoice Number: if applicable

Comment: OK to pay or OK to pay for a specific item if more than one delivery of items for that PO.



Click Save.

Click Complete (if you do not have the invoice) or

Click Complete/Print (if you have the invoice and are sending it to the Business Office). Take the receipt, PO and invoice, staple all together and send to the Business Office for processing.

To get back to your workflow, click on the box that looks like an “X” at the top left of the panel

Please remember, we are unable to process any payments against any PO that does not have a short form receipt.