BUY.IU Receipt Processing Best Practices

- Identify Staff Who Receive Automated BUY.IU Receipt Notifications
  - “Prepared by” field on Requisition document defines who will receive the notification when a receipt is required.
  - Please ensure these staff understand receipts and are trained to add a receipt.

- Designate a receipt monitor
  - Best in class units have a person who is designated to monitor the receipting process.
  - Designate someone to run a weekly non-recurring PO report.
  - Designate someone to run a weekly recurring PO report of payments over $5,000.
  - Monitor should reach out to requestors to make sure they know they have an invoice that requires receiving and that they know the process a receipt.
  - Both reports are available via a Purchasing dashboard.
  - Review the Order Management Dashboard video or visit the Locate Invoices Needing a Receipt page to learn more about monitoring receipts.

- Turn on BUY.IU Email Receipting Notifications
  - Some users have turned off all BUY.IU notifications to manage email volume.
  - Require those with receipt matching responsibilities to turn on this notification.
  - Learn how to verify your notification settings are turned on by visiting the BUY.IU Receiving Notifications page.

- Require Receipt Training
  - There continues to be a large population of BUY.IU users that struggle with receipting goods and services.
  - Requiring training for receipting should reduce the number of invoices going unmatched, improve controls, and ensure timely payments to vendors.
  - Currently, there is excellent information on processing the various types of receipts in the Receipt Resource Center on the Training Team’s website.
  - In fall of 2023, there will be an online training tutorial for receipt processing.

- Review Exception Report for FO’s
  - Periodically RC FO’s will be notified of units or individuals who are struggling to receipt invoices.
  - RC FO’s should review the process in that area to confirm the correct individuals are involved with the process and ensure they receive training or retraining to fix the issue.