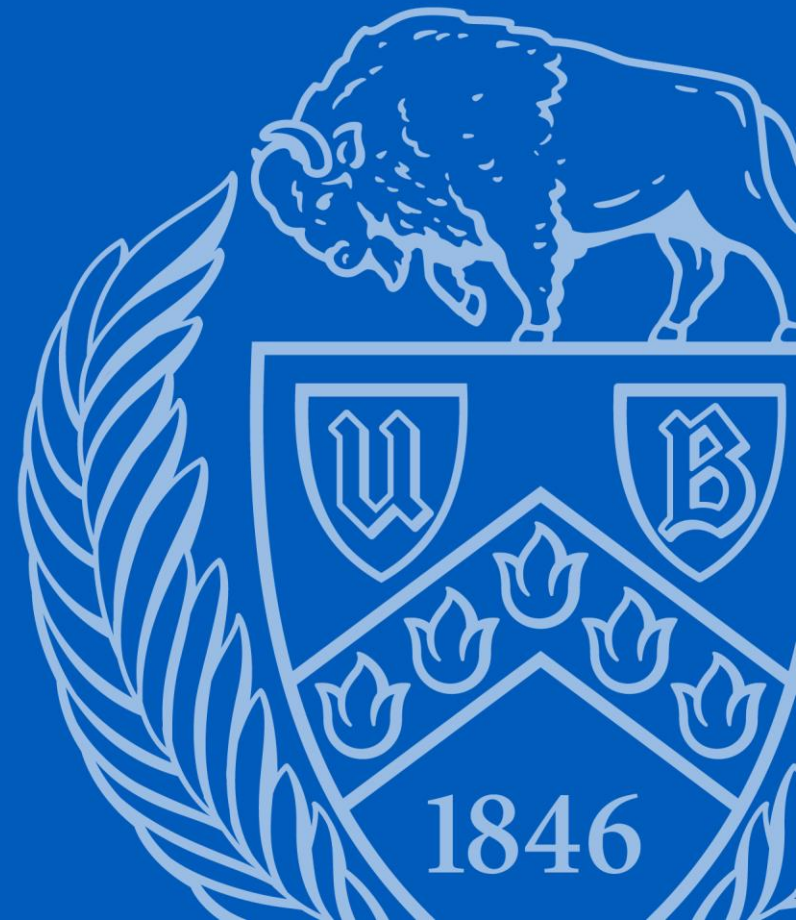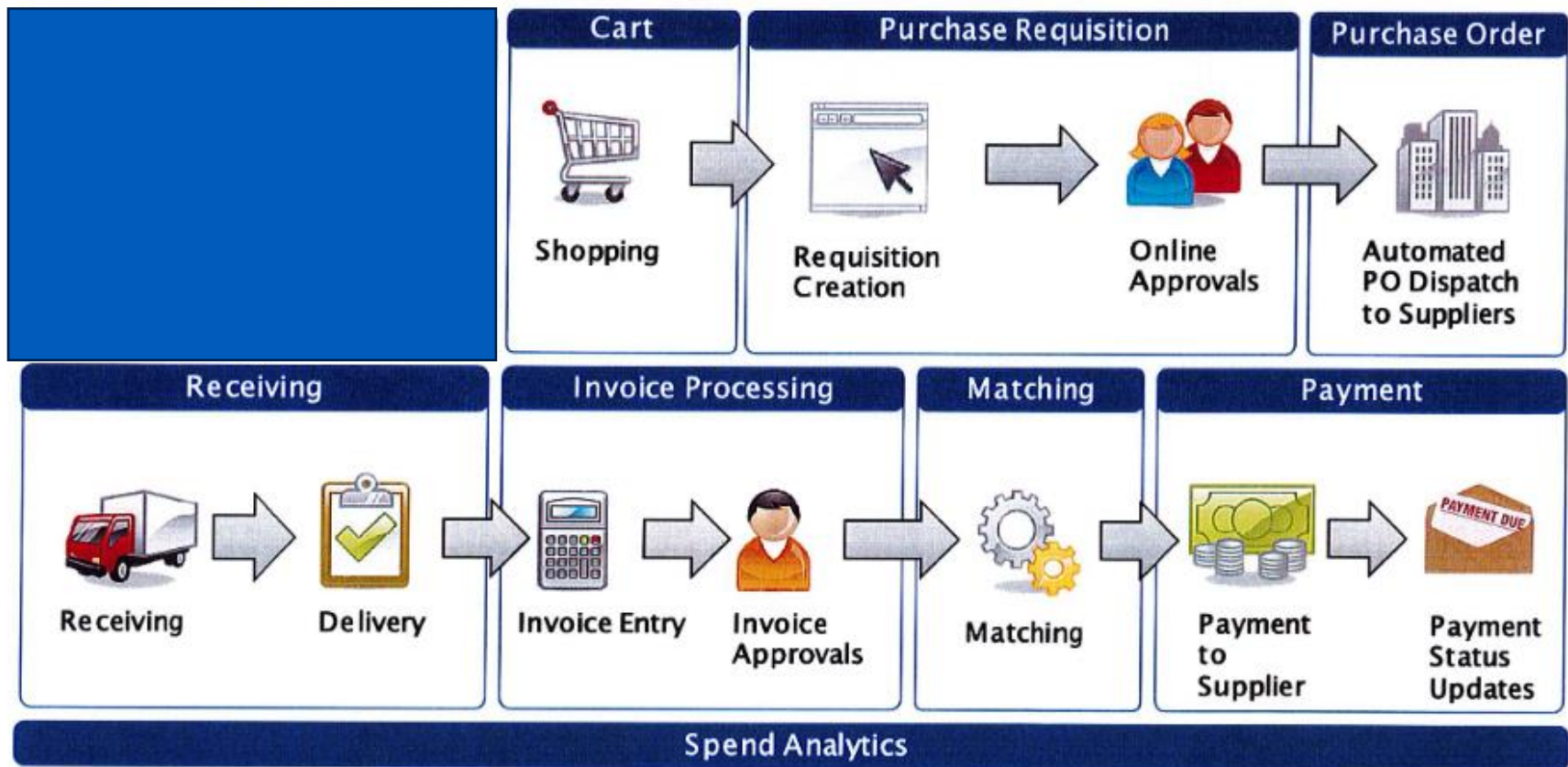# SHOPBLUE 101 & BEYOND

Tips, tricks, best practices, system enhancements & optimizations

Business Day 10/26/2023
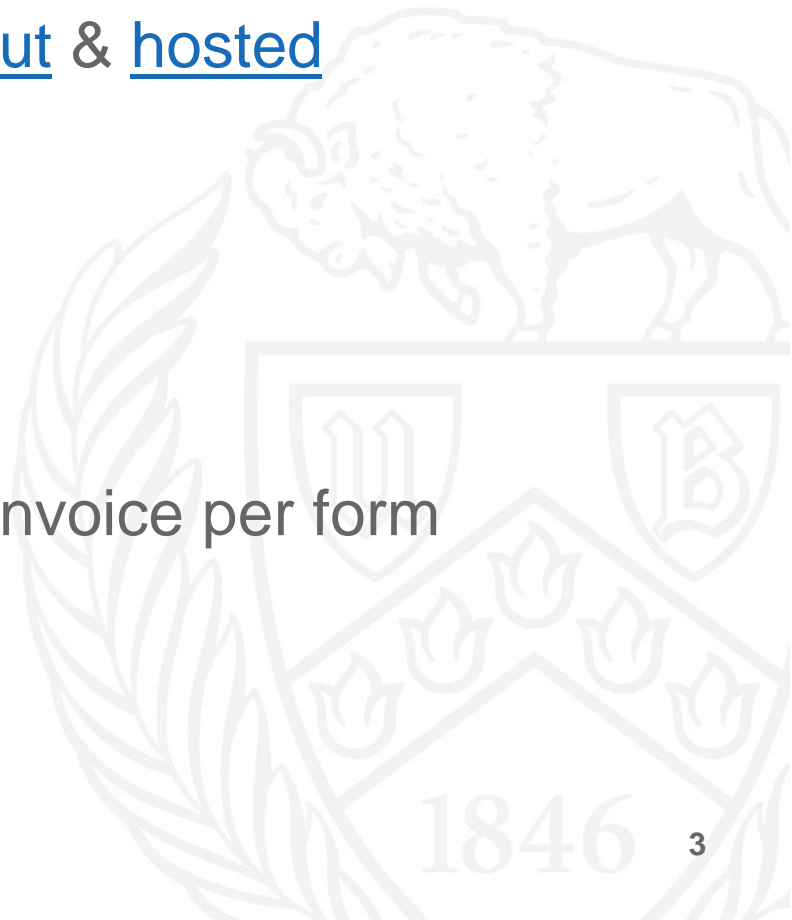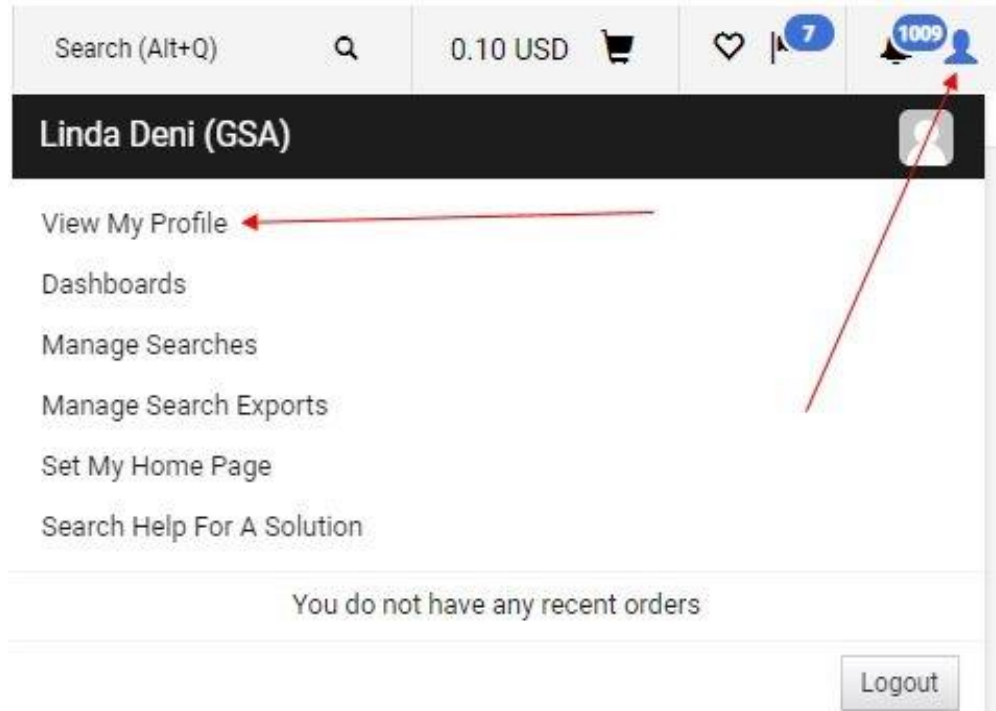
SHOPBLUE Current state

SHOPBLUE Basics

- Ways to Shop:
  - Showcase of suppliers punchout & hosted catalog orders
  - non-catalog orders
  - Forms
    - Standing order Form
    - Lab Animal Form
    - Payment Request Form – 1 invoice per form
   - EH&S Form
    - TradeMark Materials Form

Best Practices – Set up Your User Profile

- Set Up System Notifications & Receiver Notifications
- Set Up Your most used Accounting Code as Favorites
    - How to Update State Accounting code favorites for new fiscal year*
- Set Up Your Ship To Addresses & Bill to Addresses
- Set Up a new home page - Cost Approver Dashboard

Where Is My Order?

Helpful Tools

Going on vacation or out of the office for an extended time period   Assign a Substitute Approver

Placing the same order over & over again use the copy to a new cart function, see #13 i.e. Copier Maintenance, phone & water agreements orders

Preparing orders for another user who's responsible for creating the receiver

Change the cart name of your requisition to easily identify your order or add your identifier in the order description

Need ShopBlue data for what you've ordered? Set up recurring reports using the document search tool and watch the "How to Use Document Search Video

Successful Time Saver

Lisa Scholl w/Library Acquisitions asked if the ShopBlue system would be able to help her manage orders charging accounts from multiple departments with multiple account cost approvers.

"If we can get this to work, it will save me a ton of time."

Collaboration, testing & SUCCESS!

"Being able to submit a req with 6 different account numbers has been a blessing. Prior to this year, I was submitting the invoices for payment, then creating 6 different IDI's and sending them to the appropriate people. Then chasing them down for signatures, then submitting the IDI's and tracking them in our accounts. It was time consuming, frustrating and a lot of work.

The time savings alone has been worth it. I also don't have to keep track of who has signatory on the accounts. It really has made my job easier."

Next fiscal year Lisa can use the "Copy to a new cart" function to start these orders, saving even time!

7

System Improvements & Enhancements

- ## UBO Dashboards

Requisitions

Report Definitions:

Requisitions Completed in the Prior Month by Department - This report will show requisitions entered by departments in the prior full month where you have been granted document access.

Requisitions by Preparer - This report will show requisitions entered for the departments by preparer in the prior full month where you have been granted document access.

Requisitions Completed FYTD All Depts- This report will show requisitions completed within Fiscal Year to date for all departments where you have been granted document access.

Requisitions Completed FYTD

Total Requisitions: 7550   Approx. Total Amount: 72,015,459.18 USD

Showing Top 1 Requisition Status results

Reqs Completed in Prior Month by Preparer

Total Requisitions: 2298   Approx. Total Amount: 20,933,070.25 USD

Showing Top 10 Prepared By results

Pulver, Seth
Avery, Tonya
Adolf, Maureen
Wojcik, Jennifer
Johnson, Michelle
Olverd, Teresa
King, Steven

Reqs Completed in Prior Month By Dept.

Total Requisitions: 2298   Approx. Total Amount: 20,933,070.25 USD

Showing Top 10 Department results

Pharmaceutical Sciences (0511) (0815020100)
Campus Operations (0814) (0501070000)
Medicine (0470) (0812310300)
Department of Oral Biology (0437)
Microbiology and Immunology (0471) (0812110200)
Department of Chemical and Biological Engineering (0304)
Department of Chemistry (2972)

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SHOPBLUE Future State

Sourcing & Contract Modules

SUPPORT

SHOPBLUE

Directly participate in **all** sourcing & contract life cycle activities

Communications

Customized Tool

Training

Templates

Workflow

Monitoring

Sourcing Module

•Sourcing module will help our campus facilitate a consistent & standardized bidding/sourcing process

• End user Sourcing event request form to streamline your sourcing needs, centralization of all communications, documents and the entire sourcing process

•Creation of sourcing templates for purchasing staff for consistency & goals of quicker turn around times

Contract Module

•End user contract request form to streamline your contracting needs, centralization of all communications, documents and the entire contracting process

•Contract Repository for easy access, better compliance & contract management

• Increasing cost savings with efficiencies of contracting process & contract monitoring,
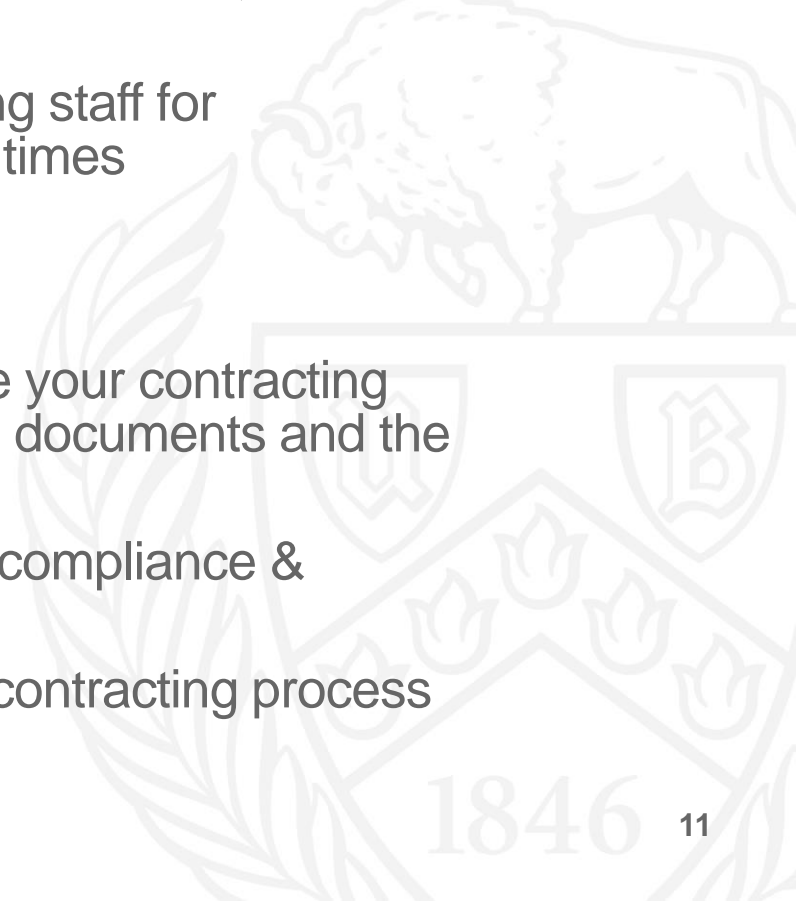
ACCOUNTS PAYABLE

Research

State

UB Foundation

Accounts Payable
Invoices

Do not attach invoices to requisitions, purchase orders, or receivers.

If a requisition is a Payment Request, the invoice must be attached to requisition and no receiver is required.

If you receive an invoice from a vendor, email the invoice to the below offices and include the purchase order number:

State and Research purchase orders: apinvoice@business.buffalo.edu

UBF purchase orders: ubf-ap@buffalo.edu

Independent Contractor invoices associated with Purchase Orders processed by Procurement: icinvoice.ap@buffalo.edu

Include the purchase order number or any notes **directly on the invoice**.
Send separate labeled pdfs for each invoice

Accounts Payable
Receivers

After your order has been received, a receiver must be created in ShopBlue to indicate the items have been received and to authorize payment.

A receiver is required for all ShopBlue transactions when a product or service is received, regardless of the transaction amount, except for Payment Requests.

Without a receiver, the supplier will not receive their payment.

Enter receivers as soon as possible.

Refer to Create a Receiver , ShopBlue receiver questions guide, Create a Return

Accounts Payable
Receivers continued

Pain points for not creating a receiver in a timely manner or ignoring requests to submit a receiver:

VENDOR may cut off the entire campus because of outstanding invoices not being paid	VENDOR may be entitled to late fees per NYS	Extreme amount of time spent on reaching out to individuals to complete receivers

- If the receiving person will be out for an extended time, it is important to assign someone else as the Purchase Order owner, contact ShopBlue Support at ubs-shopbluesupport@buffalo.edu for assistance

Accounts Payable

Receivers continued - notifications

Notifications: Does everyone have notifications turned on?

Refer to Set Up Receiver Notifications

1. A notification is sent on the day after a manual voucher is created or 3 days after an electronic voucher is created by the system.
2. Three days after the initial notification, the user will receive a daily follow up if a receiver is not created which will continue for 12 days until a receiver is created.
3. After system notifications stop, an Accounts Payable representative from the Resolutions team will reach out to request the receiver.
4. If a receiver is not entered, the final step is to escalate the request for a receiver to the University Business Officer
5. Read notifications and respond.
6. Ensure notification emails are not going to a junk folder.

Accounts Payable
ShopBlue Receiver Questions Guide & Tips

Download the ShopBlue Receiver Questions Guide also included in your bag

- **Quantity Receiver** - The quantity will default to the total quantity of the line items or services listed on the purchase order. Edit to reflect actual total received.

- Enter a receiver as soon as the item is received **except for a cost receiver. Cost receivers should be created after Accounts Payable enters the voucher.** Voucher and receiver amounts MUST match for the voucher to flow through for processing.

- Receivers are required for payment to complete. Enter the date the item was received. This is critical in June and July for state orders to determine correct fiscal year.

- When creating a receiver for a standing order, enter the invoice number for the receiver name

17

Accounts Payable
## Comments, Comments, Comments

- Refer to <u>Replying to Comments</u>

- Use the comment feature within ShopBlue to document status and issues instead of emails outside of the system.

- To view comments associated with a purchase order, click on comments tab, filter show comments dropdown to **All** to view all comments.

- Issues with the purchase order or to request a change order, comment and be sure to direct the comment to the buyer listed on the purchase order.

- If Accounts Payable reaches out to you to request a receiver and payment should not be processed, respond to the individual who sent the comment with the reason why payment should not be processed.

Accounts Payable
Payment Information Questions

- If available, payment information is listed on the voucher under Payment Status Information and within the history of the voucher.

- How to review payment status and balance on a purchase order, refer to Reviewing Payments and Purchase Order Balance

- Need to contact State/Research Accounts Payable with a question, email apinquiry@buffalo.edu

- Need to contact UB Foundation Accounts Payable with a question, email ubf-ap@buffalo.edu
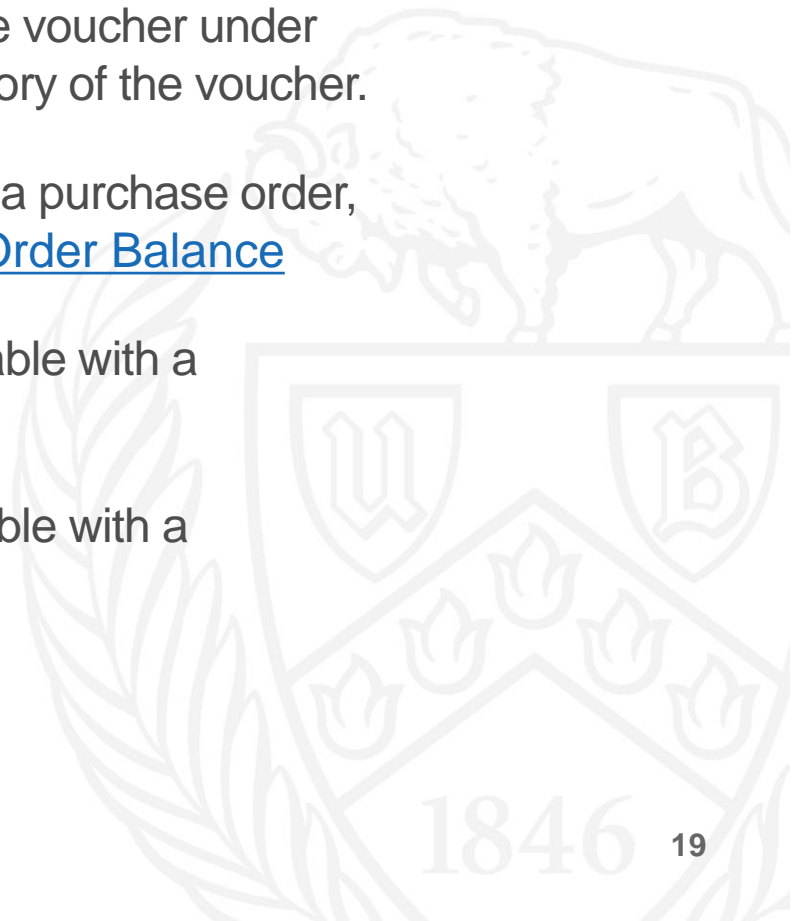
Accounts Payable
Optimizations and Enhancements

- Digital Capture

- Supplier Portal

- Enabling additional suppliers for UB on the Showcase

- Ongoing SUNY wide Improvement Projects

- Additional modules such as contracts

- Consultant

University at Buffalo The State University of New York

SHOPBLUE Training & Support

Review ShopBlue Resources posted at:

www.Buffalo.edu/shopblue
Get Help Using ShopBlue

Contact ShopBlue System Support"
email: ubs-shopblue-support@buffalo.edu
Phone: 645-4500, press 3 for ShopBlue

Ask Virtual Vic!

Hi there! 👋 I'm Virtual Vic.

I'm here to help! Ask me a question about Procurement.

How can I help you?

QUESTIONS?