

Frequently Asked ShopBlue Questions

What if there is a change in the requisition in ShopBlue?

- You can enter a comment on the requisition.
- Ex) If the price of the requisition needs an increase or decrease.

Why can't I access a punchout? / The punchout is not working?

- Most likely this is a browser/pop-up issue.
- Please change the setting in your browser.
- Try a different browser like Google Chrome.

How do I add an attachment to already existing requisition/ purchase order?

- By using the comments feature you can add attachment documents.
- First click the *Comments/ Business Purpose* tab, then click the plus (+) sign to add a comment.
- If applicable, add an email recipient. The user will be notified of your comment via email.
- Attach your document(s).
- Click the check mark to add the comment and/or document.

How do I change my address?

- You will need to go into your profile, under your default addresses update the Attn: line.
- If you don't see your exact building, search and select the desired campus or location. On the next screen you will be able to add building and room number.
- Ex) Crofts Hall is located on North Campus, there is a default *ship to* for buildings on *North Campus*. Using the default *ship to North Campus*, you can then enter your building and room number.

Why was my requisition returned to me?

- If you click on the *History* tab, Under *Field Name* and *Notes* the expand the message below.
- This will give you the reason the requisition was returned.

How to select a Supplier?

- In the supplier field, start typing in the name of the supplier.
- A drop down will appear for you to choose and select the desired supplier.
- For a larger screen, you can click on the magnifying glass to search the supplier.
- If a supplier is not yet registered in ShopBlue. In the supplier field, begin typing "New supplier".

What if I'm leaving my position and someone else will be stepping in as Purchase Order Owner?

- See documentation for running the *Pending Orders* and *Purchase Orders Completed* tip sheet to complete a document search.
- Generally, most pending Requisitions and Purchase Orders will require tracking and further action, along with completed Purchase Orders having certain statuses.
- Any questions regarding if additional action is required on an order or whether an order owner needs to be changed should be discussed with your buyer.
- Once you have determined the Purchase Orders. Fill out the Purchase Order Owner Reassignment web form.
- Once the form is approved by your department head/ UBO(s) they will send the completed form to [Business Services Support Hub](#)
- If there are current requisitions pending. Please have someone in your department or the person taking over your position copy all of your pending requisitions to their own cart.

Contact Business Services Customer Support ShopBlue System Help:

- **Need help or have questions?** Visit our [Business Services Support Hub](#) to submit and track requests and access helpful resources.
 - Call 716-645-4500

The Perfect Shopping Experience at UB: Use the ShopBlue System to Purchase Your Supplies and Services

1. Go Shopping : Choose Which Method of Shopping is Best for You

Punch out– The main screen showcases icons, the icon will take you to the stores website and you can go shopping.

Once you select check out on the website you will be directed back into ShopBlue where you will see the items in your cart to check out.

Non-catalog– If you do not see the vendor you need on the main screen you can click non catalog item, enter the supplier's name then select from drop down. Enter the description, catalog number, quantity, and price.

All goods & services must have a Purchase order created ahead of time



2. Check to See if You Need a Special Request Form

Certain orders need a form filled out such as: Lab Animal Request, Trademark Materials, EH&S -Environmental Health and Safety request (for radioactive, hazardous, or controlled substances), Standing Order, Payment Request or Service Request.

A **Payment Request form** is used when the goods/services have already been received and we have an invoice that needs to be paid, but a purchase order was never created. Please review the Confirming Received guidelines for allowable commodities. <https://www.buffalo.edu/administrative-services/managing-procurement/guidelines-and-policies/confirming-received-guidelines.html>

A **Service Request form** is used to initiate a Service Request, examples of which are repairs, maintenance agreements, printing, software agreements and anything involving labor. After submitting, the form will be routed to Procurement for processing.

A **Standing order form** is used to establish an account with a supplier to obtain specific goods and services during a set period of time at an agreed upon price (ex. having a supplier deliver 2 gas cylinders a week of for a year period). Standing orders are encumbered when the PO is created.

After shopping, submit a purchase request.

3. The Purchase Requisition Goes Through Series of Approvals

State: SUNY funds check, State account owner approval, SUNY funds final check.

UBF: Order review, UBF account owner approval, UBF supplier, AP review, UBF funds check, AP account review.

RF: RF funds check, RF grant owner approval, grants management review, the order then goes to the buyer in purchasing , RF funds final check.



4. Purchase Order is created and distributed to supplier



5. A receipt / receiver needs to be created

You have to create and submit a receiver in ShopBlue.

- Cost receiver would need to be created if you have received service. Quantity receiver would need to be created if you have received goods.
- This will Indicate that the items have been received.
- Used to verify the goods and services were delivered and authorizes payment to be released.
- If you received an invoice from supplier send the invoice to apinvoice@business.buffalo.edu for State/ RF or ubf-ap@buffalo.edu for UBF.
- Payment Request do not need to do this step.



6. A voucher is completed

A voucher is completed in Accounts Payable to pay the supplier.

