SHOPBLUE 101

Business Day 10/24/2024
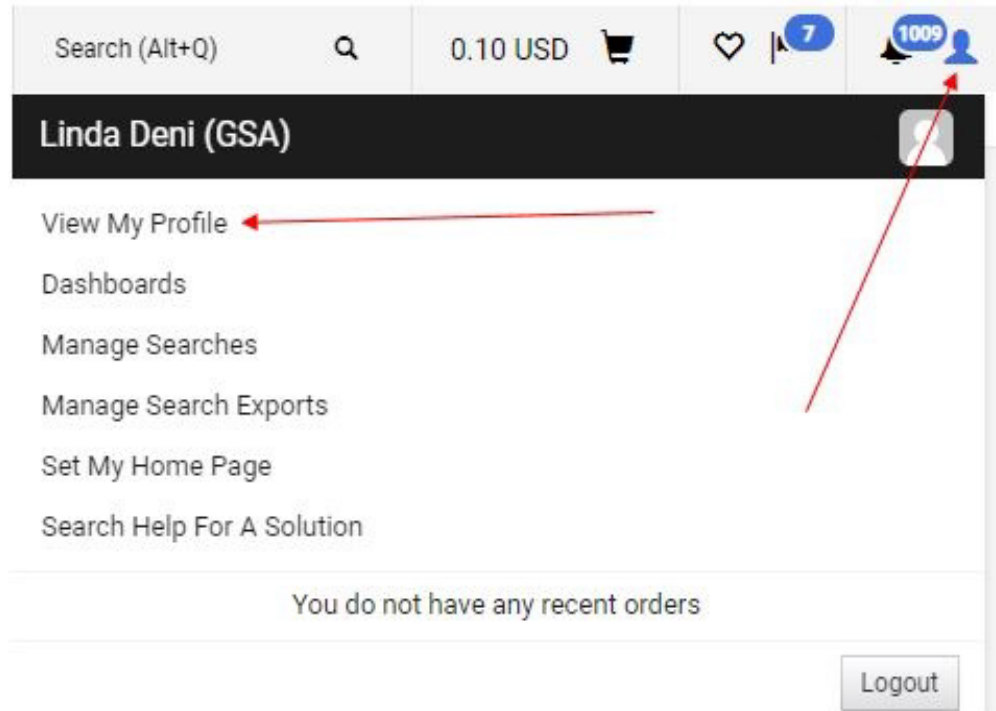
SHOPBLUE   **Basic Ways to Shop**

- Supplier Showcase punchout & hosted catalog orders
- non-catalog orders
- Forms
  - Standing order Form
  - Payment Request Form – 1 invoice per form
  - EH&S Form
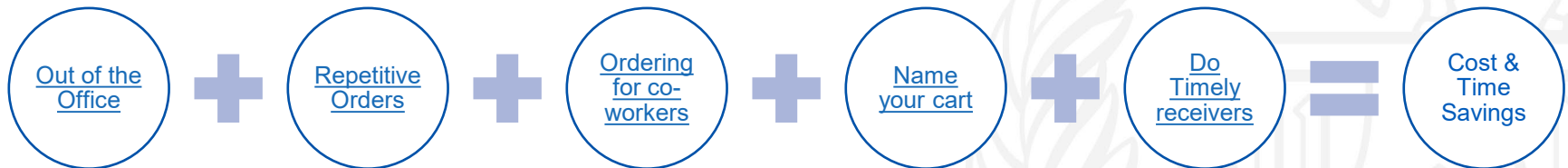 - Lab Animal Form
  - TradeMark Materials Form

Best Practices – Set up Your User Profile

- Set Up System Notifications & <u>Receiver Notifications</u>
- <u>Set Up Your most used Accounting Code as Favorites</u>
- <u>Set Up Your Ship To Addresses</u> & <u>Bill to Addresses</u>
- <u>Set Up a new home page</u> - Cost Approver Dashboard

Helpful Tools to Save Time & $

Out of the Office **+** Repetitive Orders **+** Ordering for co-workers **+** Name your cart **+** Do Timely receivers **=** Cost & Time Savings

Where is my Order?

Organization Message Helpful Information

Organization Message   ...

ANNOUNCEMENTS:

Please be aware of potential delivery delays for supplies and materials due to the ongoing dockworkers' strike disrupting East Coast, Gulf Coast ports and the Port of Montreal. Purchasing & Contract Services is actively monitoring the situation, and we are in close contact with our suppliers to mitigate any disruptions.
In light of this challenge, compounded with supply chain challenges caused by Hurricane Helene, we encourage all stakeholders to place any orders as early as possible to help ensure timely delivery of essential supplies and materials.
We appreciate your understanding and cooperation during this challenging time. If you have any urgent needs or specific concerns regarding orders, please don't hesitate to reach out to your purchasing contact.

Supplier Updates
- **Dell Technologies:** Please be advised that Dell Technologies implemented a no-right-of-return policy. UB departments must inspect and reconcile their orders upon delivery and request any type of return within 30 calendar days of day of receipt of equipment by UB. Returns to Dell are only permitted for defective products or Dell errors. All other returns will incur a 15% restocking fee, deducted from refunds or credit memos applied to that order.
- **Fisher Scientific:** Fisher Scientific is now sending electronic order confirmations and advanced shipping notices to ShopBlue to help users better track their order status

Business Purpose
Easy to use dropdown

Can't find the supplier you need in the supplier search?

WHAT WE ARE WORKING ON

Order Confirmations Tab

Shipments Tab

Purchase Order • Fisher Scientific Company LLC • 1423083 Revision 2

Status	Summary	Revisions 3	Confirmations 2	Shipments 2

Records found: 2

	Shipment No	Notice Date	Shipment Date	Delivery Date	Carrier
^	A42907903001	10/17/2024	10/16/2024	10/16/2024	
	Contact		SUNY UNIVERSITY AT BUFFAL BLDG:PHARMACY BUILDING/RM SOUTH CAMPUS BUFFALO NY 14214 United States		
^	A42907903002	10/17/2024	10/17/2024	10/17/2024	
	Contact		SUNY UNIVERSITY AT BUFFAL BLDG:PHARMACY BUILDING/RM SOUTH CAMPUS BUFFALO NY 14214 United States		

Sourcing & Contract Modules

SHOPBLUE

Communications

Customized Tool

Training

Templates

Workflow

Monitoring

Contract Module Example

Requisition · 192747296

| Summary | Comments/Business Purpose 1 | Attachments 2 | History |

Inter Technologies Corporation · 13 Items · 6,935.40 USD

⌄ SUPPLIER DETAILS [SBE] [NY] [US] [RF] S003LOC01 : INTER TECHNOLOGIES CORPORATION, 1605 N Home St, Mishawaka, Indiana 46545 United States

| Contract | UB-C001353 | PO Number | 000006AC |
| Quote number | 2402544Q | PO Clauses | |

Introducing New ShopBlue Forms

- **EH&S Form** – Single order & standing order

- **Lab Animal Form** – Single order & standing order

- **Software Form** – Purchasing software

- **Events Form** – Purchasing off-campus event
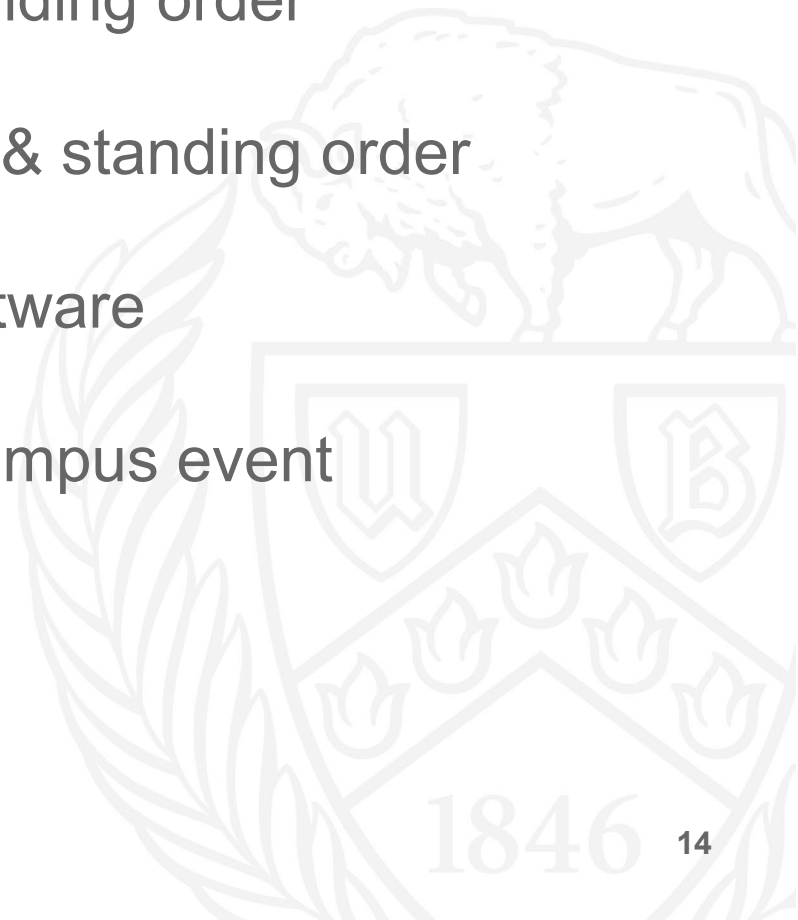
Events Form

Launching: TBD (November)

GOALS

| Shorten Processing Time | Get our contracts out of emails | A Central Place for all Event Contracts to be added |

ACCOUNTS PAYABLE

Research

State

UB Foundation

Accounts Payable
Invoices

Reminder: 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 Research 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

17

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.

Once the goods are received, enter the receiver as soon as possible.

Enter Actual date items received. Note: Receiver date defaults to current date.

Refer to Create a Receiver and other resources at: www.buffalo.edu/shopblue

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 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 to comments by entering receiver or status.
6. Direct comments back to an individual.
7. Ensure notification emails are not going to a junk folder.

ShopBlue Receiver Questions Guide & Tips
Under Navigation Key and Guides at www.buffalo.edu/shopblue

- **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 actual date the item was received. The system defaults the receiver date to the current date.   For state funded orders, this is critical in June and July to determine correct fiscal year.

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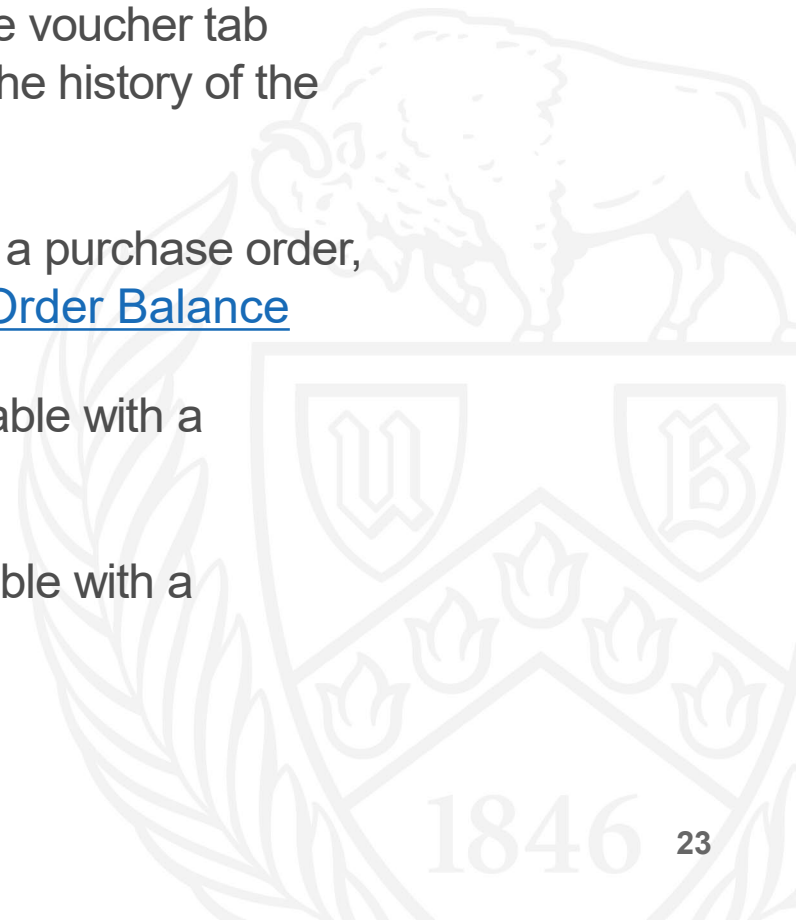
Accounts Payable
Comments, Comments, Comments

- 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.

- To request a change order, 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 tab 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
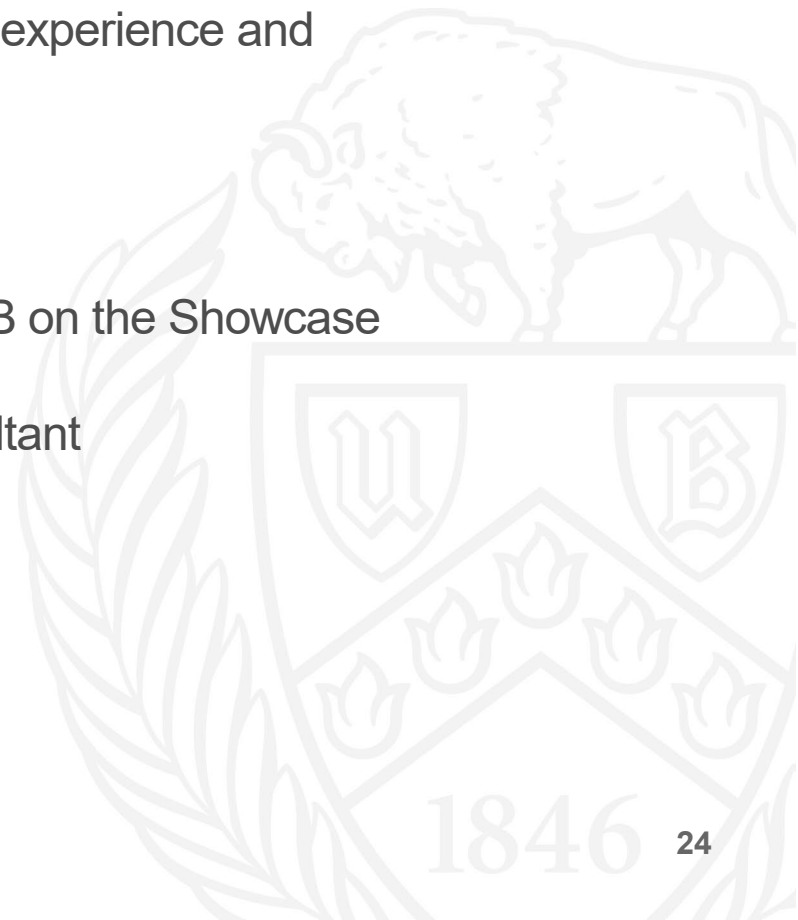
Accounts Payable
Optimizations and Enhancements

We are continually evaluating and refining our processes to better meet your needs. We strive to deliver the best possible experience and service.

- Digital Capture

- Continually Enabling additional suppliers for UB on the Showcase

- Ongoing collaboration with SUNY and a Consultant

SHOPBLUE **Training & Support**

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

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?

How Did we do? Please take the Session Survey on your smart device using the QR Code on your schedule.