

# ShopBlue Receiver Questions

## Why Is a Receiver Required?

A receiver provides an acknowledgement of receipt of the goods or services. A receiver is required for every transaction, except for Payment Requests and Amazon orders. Once these are submitted, ShopBlue will release payment. The requisitioner or end user with receiving permissions within the department must create the receiver.

Within the receiver:

- The system will default to the current date. **PLEASE CHANGE** to the exact date the goods/services were received.
- Enter any notes or tracking information as applicable.
- Attach a packing slip as applicable.
- Do not attach the invoice to the receiver. The payment will not be complete without an email. For state and research funds email the invoice to [apinvoice@business.buffalo.edu](mailto:apinvoice@business.buffalo.edu). For UB Foundation email the invoice to [ubf-ap@buffalo.edu](mailto:ubf-ap@buffalo.edu)

## Who Should Create The Receiver?

- The requisitioner or the end user within the department with permissions to receive in ShopBlue should create the receiver.
- ShopBlue generates email notifications requesting receivers after an invoice has been vouchered. End users do not have to wait for the notification to enter a receiver for punchout or non-catalog orders. A receiver should be entered for standing orders after a voucher is created so amounts should match.
- If the requisitioner or purchase order owner changes and additional receivers against the purchase order will be required, email [ubs-shopblue@buffalo.edu](mailto:ubs-shopblue@buffalo.edu) for help.

## How do I create a Quantity Receiver?

- Using the search bar, look up the purchase order, select the *Receivers* tab, select the plus (+) sign
- From the dropdown menu, select *Create Quantity Receiver*.
- **Change Receiver Date** to the date the item or service was received. If you do not know the actual date the goods/ services were received, change the receiver date to the invoice date to ensure you are abiding by the net 30 payment terms.
- The quantity will default to the total quantity of the line items or services listed on the purchase order. EDIT TO REFLECT TOTAL ACTUALLY RECEIVED
- If you have received your entire order, click *complete* and you are finished.
- If you have **not** received any of the items or services on a specific line, select *Remove Line*. This will remove that line from the receiver.
- The removed lines will disappear from the screen to be received at a later date.
- After that, enter the quantity of items for the lines you have received and select *complete*.
- Create additional quantity receivers as needed when the rest of your items are received for that line.

## How do I create a Cost Receiver?

- Typically, for a cost receiver, this is better to do after a voucher is entered. Voucher and Receiver amounts **MUST** match for the voucher to flow through for processing.
- Using the search bar, look up the purchase order, go to vouchers tab to get voucher number, write down the number (you will need this later) Select the *Receivers* tab, select the plus (+) sign
- From the dropdown menu, select *Create Cost Receiver*.
- **Change Receiver Date** to the date when the item or service was received. If you do not know the actual date the goods/ services were received, change the receiver date to the invoice date to ensure you are abiding by the net 30 payment terms.
- List the invoice # and /or voucher # in the notes section.
- Update the Cost by entering the dollar amount you are receiving (or the amount being invoiced). (Scroll down)
- Each voucher requires a separate receiver. Received amount and vouchered amount must match for voucher to be paid.
- Then select *Complete*. Repeat steps as needed for each voucher.

## How do I create a return for over ordered items?

- Go to the *Create Quantity Receiver* page.
- Next, in *Status* select *Returned from the drop down menu*
- Enter the quantity of the items you will be returning.
- To finish, click *Save Updates* then click *Complete*.
- Any canceled or returned items need to be communicated to the buyer and AP for further action through comments.

## 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

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## What to do when I get an email to submit a receiver before I received any items?

- These notifications are automatically generated once we receive an invoice/voucher for the item(s).
- Once you get the item(s), you can create a receiver, no more notifications will be issued, and the invoice can be paid.
- Please note that many companies invoice as the item(s) ships even though the goods have not yet been physically received.

## How do I create a receiver when I plan on returning or exchanging an item?

- If you are getting a replacement item, you will need to work with your buyer to cancel the current Purchase Order.
- Then a new Purchase Order will need to be issued for the new item.
- Any cancelled or returned items need to be communicated through comments to the buyer and AP for further action.

## How do I create a receiver for damaged goods?

- To create a return, go to the *Create Quantity Receiver* page, click the dropdown box in *Line Status* and select *Returned*.
- To finish, choose the quantity that you will be returning then click *Save Updates* and *Finish*.
- Any cancelled or returned items must be communicated to the buyer and AP through comments for further action.

## What if an item never arrived and I contacted the supplier to get a refund?

### How do I notate this on receiver?

- If you have not yet received the item in the system, you can create a receiver as you normally would. However, in the dropdown for that line, there is an option for "Cancelled".
- If you have already created a receiver for the item, just add a comment to your buyer in the Purchase Order that the item was returned, credit memo issued.

## How do I know when to create another receiver?

- For every voucher/invoice entered, a notification is sent.
- If new items are invoiced/vouchered, then a new notification is generated.
- You can verify if the receiver has already been completed by checking that the net invoiced amount equals the net received amount.
- If equal: no receiver needs to be created.
- If unequal: yes, a receiver needs to be made.

## What if my purchase order and the invoice is for two items, but I only physically received one?

- If you're expecting to receive the second item, please create a receiver for the one item you have physically received.
- Then create another receiver when the second item comes in.
- If you are not expecting to receive the second item, please comment to the buyer to cancel that item.

## How do I cancel a receiver?

- You will need to create a new receiver for a negative amount to "cancel out" the previous receiver.
- Select the plus(+) as if you were submitting another receiver.
- Put a negative amount for either the quantity/cost line for the incorrect item.
- For Example - If you accidentally received 2 items but you have only physically received 1, you can create a new receiver for -1 in the quantity line to "cancel out" the mistake.
- The same works for cost receivers and using the negative dollar amount.
- This will "cancel out" the item you received from the previous receiver.
- Any cancelled or returned items needs to be communicated to the buyer and AP in the comments for further action.

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