

## Create a Receiver

\*\*\*Please note: A receiver is required for every ShopBlue transaction except for Payment Requests\*\*\*

### Types of Receivers

#### Cost Receivers

- Used for Standing Orders and Service Request Forms.
- The receiver should be done based on the dollar amount that has been received or invoiced.
- The system will not allow a quantity receiver for orders that require a cost receiver.

#### Quantity Receivers

- Used for majority of all other orders based on the quantity of items or services received.
- The system will not allow a cost receiver for orders that require a quantity receiver.

### How to Create a Cost Receiver

1. When item(s) or service(s) have been received for a standing order or a service request form, first locate the purchase order (PO) number. Type the PO number into the search bar at the top right of the Shopping homepage and press enter. Select the purchase order in the dropdown menu (Figure 1).

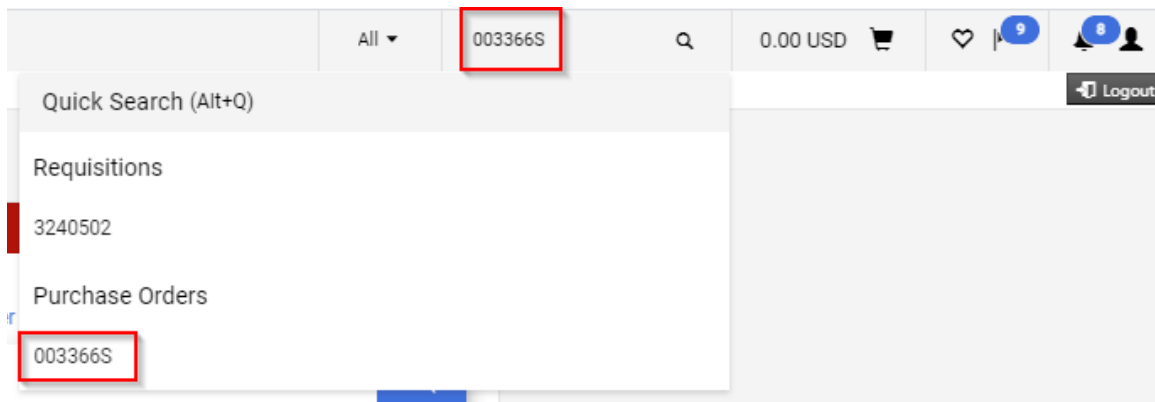


Figure 1

2. On the *Purchase Order* page, select the *Receivers* tab at the top (Figure 2).

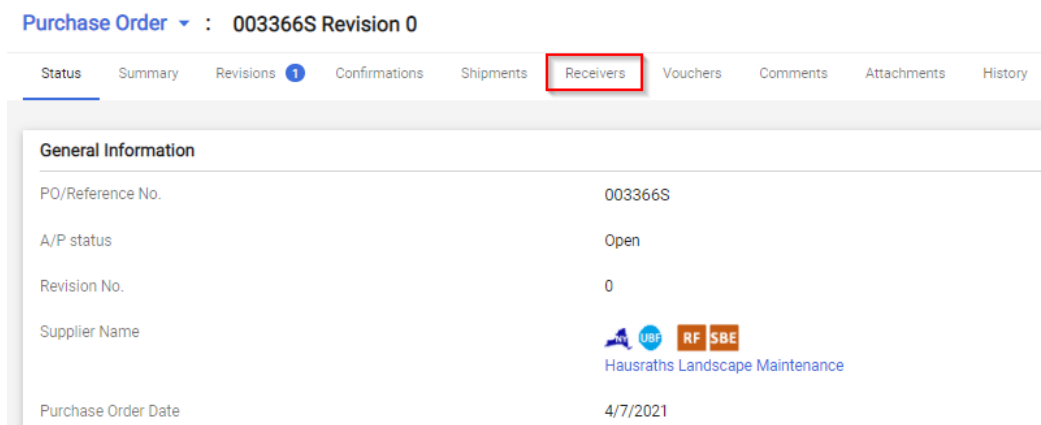


Figure 2

- On the *Receivers* tab, you will see all of the receivers that have previously been created for the PO. To create a new receiver, select the plus (+) sign. From the dropdown menu, select *Create Cost Receiver* (Figure 3).

Purchase Order : 003366S Revision 0

Status Summary Revisions 1 Confirmations Shipments **Receivers** Vouchers Comments Attachments History

Records found: 0

There are no receivers for this PO.

Completed

Total (700.00 USD)

Create Quantity Receiver

Create Cost Receiver

700.00

700.00

Figure 3

- You are now creating a Cost Receiver. The *Receiver Date* will default to the date you are creating the receiver; be sure to change it to the date the item or service was actually received. If there is a corresponding voucher, please add the voucher number to the *Notes* section (this is not required if no voucher has been created yet) (Figure 4).

Summary Comments (0) History

Exact Match: PO No. 003366S

Header Information

Receiver Name 2021-04-07 BUF-DALTONHO 01

Receiver No To Be Assigned

Receiver Date 04/27/2021 mm/dd/yyyy

Packing Slip No.

Supplier Name Hausraths Landscape Maintenance

Received by Dalton Holler (University at Buffalo)

Location

RECEIPT ADDRESS

Attn: Dalton Holler  
University at Buffalo  
Bldg: Crofts  
Room: 224  
North Campus  
Buffalo, NY 14260  
United States

Carrier

Deliver To Address

Carton Box Count

Attachments

Notes (1,000 Chars. Max)

DELIVERY

Other

Attach/Link

Voucher: 375893

Figure 4

- Please note that the full amount of the total of the PO is defaulted as the cost. In the cost field, update the dollar amount to the amount you are receiving (or the amount being invoiced). Then select *Complete* (Figure 5).

Receiver Lines

Line Details

Show Receiver Details

For Selected Lines: Remove Selected Items Go


PO No.	PO Line No.	Product Name	Catalog No.	Qty/Cost Ordered	Previous Receivers	Cost	Line Status	Actions
003366S	1	Item - Snowplowing and Ice Removal from sidewalks \$100/month		700.00		100.00	Cost Received	Remove Line Receive/Cancel

Delete Add PO Save Updates Complete

Figure 5

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- After selecting *Complete*, you will receive a confirmation screen (Figure 6). The receiver you just completed now has a number associated with it and you can click to view it.

Receiver No. 002209  has been created for the following PO No(s):


- PO/Reference No. 003366S 

Figure 6

- Repeat these steps as needed to create additional cost receivers for the PO.

**Note:** In the purchase order, click the *Receivers* tab at the top to access a summary of the receivers created, the dollar amount you have received (net received), and the balance on the PO (Open Cost) (Figure 7).

Purchase Order ▾ : 003366S Revision 0

Status

Summary

Revisions1

Confirmations

Shipments

Receivers1

Vouchers

Comments

Attachments

History

Records found: 1

+

No.	Receiver Date	Receiver Type	Received by
002209	4/27/2021	Cost	Holler, Dalton

Line Details

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	Item - Snowplowing and Ice Removal from sidewalks \$100/month		700.00 USD	1 USD	700.00 USD

Qty / Cost (In)	Qty / Cost (Out)	Status
600.00 USD		Open Cost
100.00 USD		Net Received

Figure 7

## How to Create a Quantity Receiver

1. When item(s) or service(s) have been received, locate the Purchase Order number. Type the PO number into the search bar at the top right of the Shopping homepage and press enter. Select the purchase order in the dropdown menu (Figure 8).

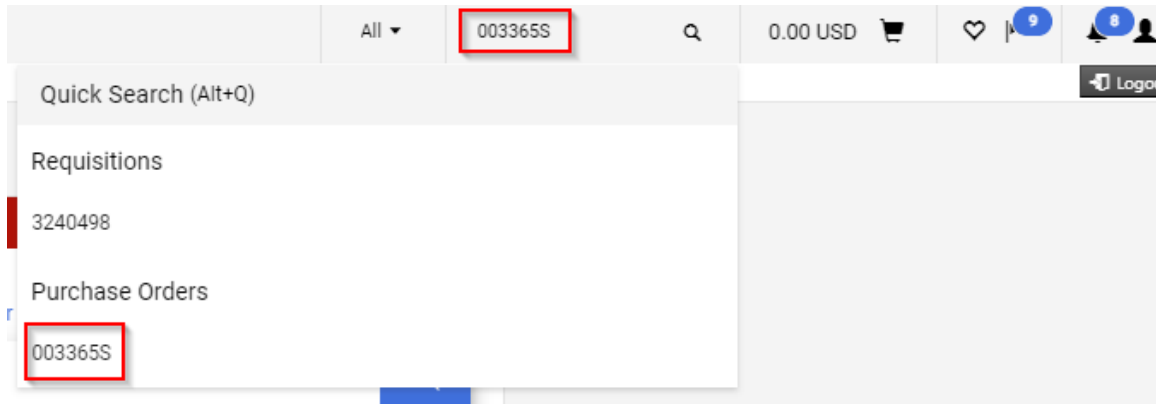


Figure 8

2. On the *Purchase Order* page, select the *Receivers* tab at the top (Figure 9).

Purchase Order ▾ : 003365S Revision 0

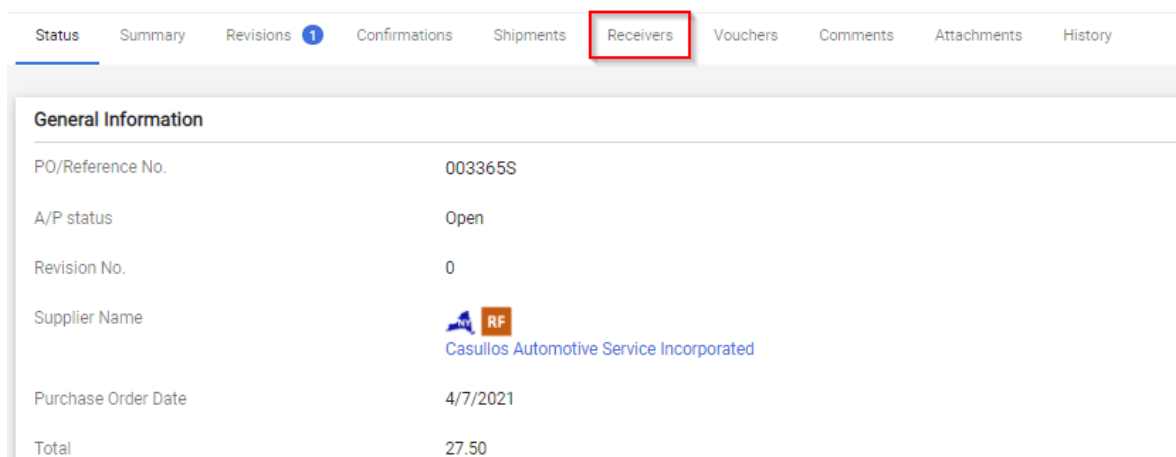


Figure 9

3. On the *Receivers* tab, you will see all of the receivers that have previously been created for the PO. To create a new receiver, select the plus (+) sign (Figure 10).

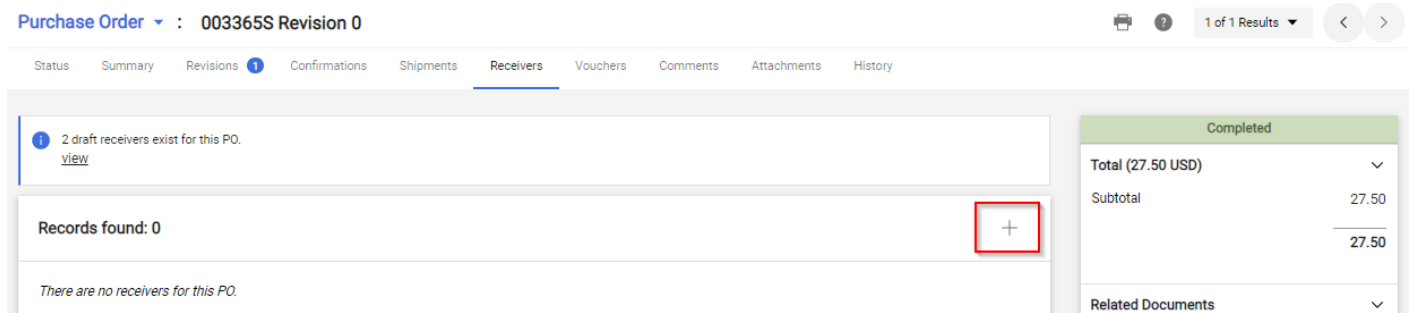


Figure 10

- You are now creating a quantity receiver. The *Receiver Date* will default to the date you are creating the receiver; be sure to change it to the date the item or service was actually received. If there is a corresponding voucher, please add the voucher number to the *Notes* section (this is not required if no voucher has been created yet) (Figure 11).

Figure 11

- Please note the quantity will default to the total quantity of the item(s) or service(s) listed on the PO. If you have received your entire order, click *Complete* and you are finished (Figure 12).

Figure 12

- If you have not received all of the item(s) or service(s) on your PO, select *Remove Line* for the line item(s) or service(s) you have not received. 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 for the lines you have received and select *Complete* (Figure 13).

Figure 13

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- When you have received the rest of your items, follow the steps above to create an additional receiver. The items you have already received will have a "0" in the quantity field with a corresponding receiver number in the *Previous Receivers* field. Enter the quantity of the items you have now received and select *Complete* (Figure 14).

The screenshot displays the 'Receiver Lines' interface. It features a table with columns: PO No., PO Line No., Product Name, Catalog No., Qty/UOM ordered, Previous Receivers, Quantity, Add to Inventory, Line Status, and Actions. Two line items are visible. The first item, PO Line No. 1, has a quantity of 0 and a previous receiver of 002210. The second item, PO Line No. 2, has a quantity of 1. The 'Complete' button at the bottom right is highlighted with a red box.

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receivers	Quantity	Add to Inventory	Line Status	Actions
003365S	1	Vehicle Part #1	15687	1 EA	002210	0		Received	Remove Line Receive & Return
003365S	2	Vehicle Part #2	541225	1 EA		1		Received	Remove Line Receive & Return

Buttons at the bottom: Delete, Add PO, Save Updates, Complete

Figure 14

**\*Note:** Once a receiver has been submitted, it is matched to the Purchase Order and Invoice. If the match is successful, payment will be initiated. If unsuccessful, Accounts Payable will reconcile any discrepancies.