

ShopBlue Important Terms

- **Receipt:** An indication that goods or services have been received, returned, or cancelled.
- **Buyer Invoice:** The customer's version of the invoice. An invoice contains information about the goods or services delivered from the supplier. An invoice typically contains shipping and handling in addition to tax information.
- **PO Invoice:** An invoice associated with one or more eProcurement purchase orders.
- **Non-PO Invoice:** An invoice that is NOT associated with an eProcurement purchase order. A non-PO Invoice may contain a PO number if the invoice was distrusted to the supplier external to ShopBlue.
- **Invoice Type:** Defines the type of document being displayed
- **Invoice Status:** There are different categories with which an invoice can be marked, including payable, paid, in process, dispute, and cancelled.

Roles used in Training

- **Requestor:** These users can shop for items and submit carts
- **Approver:** These users can review (approve, return or reject) purchase requisitions assigned to them.

Documents

- **Shared Cart:** The shared cart features allows organizations to combine shopping and purchasing into shared carts for group orders. All group members are able to simultaneously shop and monitor cart contents, avoiding duplication and removing the burden of processing multiple individual orders. Shared carts can also be used to achieve discounts with suppliers that provide bulk order discounting.
- **Purchase Requisition (PR):** Once a cart is submitted, it becomes a Purchase Requisition (PR). Funding for the Purchase is oftentimes validated (valid account entry and available account funding). Once a Purchase Requisition is fully approved and complete it becomes a Purchase Order.
- **Purchase Order (PO):** A Purchase order is an order to purchase goods or services. A purchase order can be considered a binding contract. It contains the name and/or description of the goods you are buying, as well as the quantity, price, payment and delivery terms. Many suppliers, distributors and vendors will insist on a purchase order before they sell to you.
- **Receipt:** A document indicating that goods or services included on the associated purchase order have been received, returned, or cancelled.

Shopping Methods

- **Hosted Catalogs:** These are an electronic form of a supplier's printed catalog. Suppliers provide information about the items that they sell on a spreadsheet. This information is loaded into the application to be viewed by requestors as they shop. Normally, organization specific pricing is applied to a host catalog.

Hosted Catalog data from ALL suppliers is put into a single ShopBlue database. When a user shops for lumber, not only do they see the items from Home Depot, but other stores selling similar items. Hosted Catalog shopping allows quick comparison shopping across suppliers.

- **Punch-out Catalogs:** From the application, you can click on a hyperlink to go to a supplier's site to shop. This experience is very similar to shopping directly from the suppliers website as a consumer expect:
 1. You will only see those items that you can order
 2. You will only see your organizations negotiated pricing
 3. After shopping, you add those items directly to your cart the same as with a hosted catalog.

*If an item originates from a punch-out site, it is considered a punch-out item.

- **Level 2 Punch-out:** This is an additional function provided by some Punch-out Suppliers. A "proxy" catalog is loaded, which allows an end user to search for products available on a punch-out. No prices are included in the proxy catalog. An end user will punch-out via an "order from supplier" link to view the prices and purchase the item(s). Types of Level 2 punch-outs are:
- **Non-Catalog Items:** A non-catalog item indicates the item is not available via hosted catalog or punch-out catalog. A user is required to accurately describe the item, completing fields of information on a form such as supplier, item description, catalog number, UOM, price, quantity, and other criteria that provide an approver with enough data to make a decision on the requisition.
- **Forms & Form Requests:** Forms/form request are shopping methods that allows users to order goods and services that do not fit into the catalog model. Forms/form requests can be used for varying purposes and are available to shoppers for completion. The necessary information requested on a form/form request supports the specific purpose. Forms are used exclusively to order goods and services. Form requests can be used for purchasing requests but can also be used for requests that do not directly involve the purchase of a good or service.

Form Actions

- **Update:** this action will save any changes made to the form. *Note: this option is only available when changes are being applied to an existing form.*
- **Complete Form and Go to Cart:** this action will save the form and add it to your active cart. Users will then be automatically routed to their active cart.
- **Add to Cart and Reset Form:** this action allows users to add the form to their active cart. The form will then be cleared, allowing the user to enter new information onto a new form.
- **Save to Cart and Add Another:** this action will save the form to your active cart. Users will then have the option to add an additional form with the same information as a second line item.
- **Add to Draft Cart:** this action will allow users to add the form to one of their existing draft carts rather than to their active cart.
- **Add to Favorites:** this action will save the form in the desired favorites folder selected by the user. The user can then conveniently access the completed form if it will be used multiple times.
- **Add to New Cart:** this action will add the form as a line item to a new cart.

Approver Document Actions

- **Approve/Complete & Show Next:** this action approves current requisition and moves it to the next step in the workflow. Users will then automatically be advanced to the next requisition in the queue.
- **Approve/Complete Step:** this action will approve the current requisition and moves it to the next step in the workflow.
- **Return to Shared Folder:** this action returns the requisition to the shared folder. The requisition will be un-assigned and no longer assigned to the user.
- **Place on Hold:** this action places the requisition on hold. The user will be required to enter a hold reason.
- **Return to Requisitioner:** this action will return the requisition to the original requisitioner.
- **Forward to...:** this action assigns the requisition to another Approver to have them approve on your behalf. Entering a comment to the new approver will be required.
- **Copy to New Cart:** this action copies the current requisition to a new draft cart.
- **Add Comment:** this action allows the user to add a comment and attachments to the document. The user will have the option to send an email to the involved users notifying them of the action.
- **Add Notes to History:** this action will allow the user to attach a note to the document.
- **Reject Requisition:** this action will CANCEL (reject) the requisition.