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).

2. On the Purchase Order page, select the Receivers tab at the top (Figure 2).
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. From the dropdown menu, select Create Cost Receiver (Figure 3).

4. 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).

5. 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).
6. 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.

   ![Confirmation Screen](image)

   *Figure 6*

7. 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](image)

   *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).

2. On the Purchase Order page, select the Receivers tab at the top (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).
4. 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](image1.png)

5. 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](image2.png)

6. 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](image3.png)
7. 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).

*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.
How to Edit or Delete a Submitted Receiver

When a receiver is created, a mistake can be made by entering the wrong quantity or the wrong dollar amount. A receiver can even be created against the wrong PO. You may reopen and delete receivers.

When reopening a receiver, you will be required to enter a comment on the receiver as to why you are reopening it. After entering a comment to indicate why you are reopening it, the receiver will be in draft mode again. With the receiver being in draft mode, you are allowed to make edits or delete the receiver completely.

*Note: Some receivers are not eligible to be reopened. A message will display if you are not allowed to reopen a receiver for any of the following reasons:

- An invoice has been associated with the receiver
- It has been exported to an external system

How to Edit a Submitted Receiver

1. Open the receiver. This can be done a number of ways including clicking on the receiver number after the receiver is created, by searching for receivers, or by accessing the receiver from an associated document (purchase requisition, purchase order, invoice).
2. Select the Summary tab.
3. Click the Reopen Receiver button at the top right.
4. A confirmation message will display asking if you want to reopen the receiver. Click OK.
5. An Add Comment pop-up will display.
   a. Select if you want users associated with the document to receive an email notification about the reopened receiver. You can also add email recipients to receive a notification.
   b. Enter a reason for reopening the receiver, up to 1,000 characters.
   c. Click the Reopen Receiver button.
6. The page will refresh with the receiver in draft status. The Summary tab may be edited. You can select to Add PO or make any Line Details updates.
7. Click Save Updates and Complete when you are finished making changes.

How to Delete a Submitted Receiver

1. Reopen the receiver as described above.
2. Click the Delete button.
3. A confirmation message will display asking if you want to delete the receiver. Click OK.
4. The receiver is deleted and you will be returned to the View Draft Receivers page.