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](image1.png)

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

   ![Figure 2](image2.png)
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.

![Figure 6](image)

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).

![Figure 7](image)
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](image)

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

![Figure 9](image)

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](image)
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)

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)

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)
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.