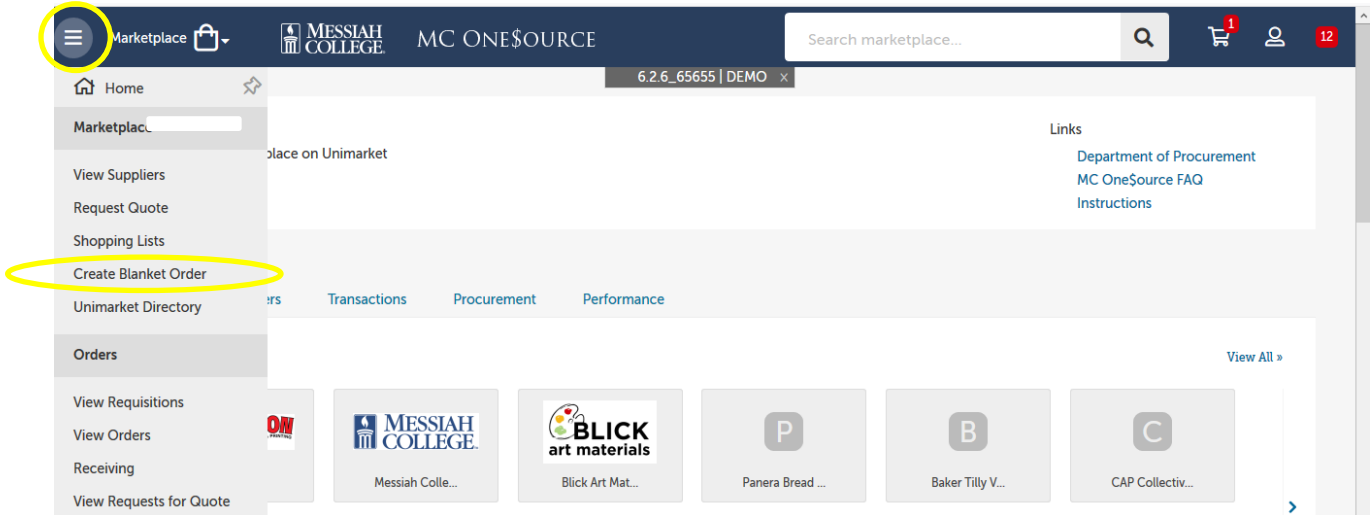


- From any tab, click the hamburger menu bar and click **Create Blanket Order**



- **Name:** Type a descriptive blanket order name with FY and the current year first.
- **Description:** Type a detailed description of the services and products to be purchased. Include the contract or agreement expiration date.
- **Supplier:** Click drop down arrow and select the vendor
- **Amount:** Type in the blanket order dollar amount. Please estimate usage during the entire blanket order period. (Amounts can be increased or decreased as long as the blanket has not expired.)
- **Valid To:** Date can be typed in or chosen from the calendar. (Date can be extended as long as the blanket has not expired.)

Create Blanket Order

Details

Name * FY19 Leased Campus Copiers

Description * Digital colored copier Serial # 10171992. We pay a lease agreement on a monthly paper usage payment.

Supplier * 206 Design

Amount * \$

Valid From * 12/3/2018 12:00 AM

Valid To * Pick a date

- **Default Account Code:** Enter the **Account** coding. In the first box, type the **org code**. Options will appear, click to choose the correct option or continue typing. Search by org name is also available by typing the first word of the org.
- In the second box, type the **account code**. As you begin typing, options will appear, click to choose the correct option or continue typing. Search by account name is also available by typing the first word of the account.
- If applicable, type the **activity code** in the third box. As you begin typing, options will appear, click to choose the correct option or continue typing. Search by activity code is also available by typing the first word of the activity code.

****Please Note: If allocating to more than one org/account number, please contact Purchasing Department for instructions.**

- The **Bill To** address defaults to Accounts Payable and should not be changed. **Ship To:** Verify address is correct.
- **Available To:** In most cases this will just have the creator's name. If selecting others, please keep in mind they will have access to place orders against this blanket order and approve invoices. Click in box and type the appropriate employee name.

- **Attachments:** Attach contracts, agreements, emails or quotes from the supplier to the requisition. (Attachments must be saved as PDF first.) Click **Browse**, find the file to be uploaded and double click on it. These attachments will be seen by the supplier unless you uncheck the Share with Supplier box.

Notifications:

- **Send to Supplier:** Check this box to email the PO to the supplier after the blanket order is approved. If not checked, the PO will not be emailed to the supplier and only the users listed as Available to will be emailed.
- **Hide Amount:** The Supplier does not need to know the blanket order amount. **Do not** uncheck this box.
- **Alert Amount:** When the funds available on the blanket order drop below the alert amount entered, a warning email is generated and sent to your email. (Optional)
- **Alert Date:** On the date entered, an email is generated to remind the user to create another blanket order. (Optional)
- In the **Justification** box, provide the business purpose for the purchase. This is required information, please be specific. Who, what, where and when
- If there are any internal attachments (email requests, other supplier quotes, etc.), save files as pdf's, click on the **browse** link in the **Justification Attachments** box, browse to find each file and double click on the file. These attachments are internal only and will not be seen by the supplier.
- Approvals – Organization Unit – should be blank
- After reviewing and verifying that all information is correct, click on **Create**.

The screenshot shows a web form for creating a blanket requisition. The form is divided into several sections:

- Notifications:** Contains checkboxes for "Send to Supplier" and "Hide Amount from Supplier", both of which are checked. Below these are input fields for "Alert Amount" (set to \$1000) and "Alert Date" (with a "Pick a date" button).
- Justification:** Includes a light blue informational banner stating "The justification and attachments are for review by the approver. They will not be sent to the supplier." Below this is a text field for "Justification" containing "Monthly copier lease payments for College Press." and a "Justification Attachment" section with a "Drop files to attach, or browse" button and a "Size limit 50M" note.
- Approvals:** Features a dropdown menu for "Organization Unit".
- Buttons:** At the bottom left, there are "Create" and "Cancel" buttons.

Yellow circles in the original image highlight the "Send to Supplier" and "Hide Amount from Supplier" checkboxes, the "Alert Amount" and "Alert Date" fields, the "Justification" text field, the "Justification Attachment" section, the "Organization Unit" dropdown, and the "Create" button.

The blanket requisition will now be forwarded through the appropriate approval queue. Remember that following approval, the blanket purchase order is not sent to the supplier unless **Send to Supplier** box in the Notifications section is checked. Also, any invoices applied to this blanket purchase order will not need to be approved again by the approval queue.