

REFERENCE GUIDE: BLANKET ORDERS

PURPOSE

Blanket Orders are purchase orders issued for a one time encumbrance which allows for repeated releases/orders against one purchase order number. Multiple invoices are issued throughout the term of the Blanket.

CRITERIA

Blanket orders are to be used only when the following criteria are met:

- Term
 - Unrestricted FOAPALS – within one fiscal year
 - Restricted FOAPALS – within the grant term (may span more than one fiscal year)
- Estimated encumbrance for the entire term
- Supplier
 - Approved supplier
 - Products are not available from a *buyND* catalog
- Justification - Procurement Services approval is required for all Blanket Orders

In most cases Blankets may not be used for items that require Risk Management and Safety approval

REQUIREMENTS

PO REQUIREMENTS:

- Low dollar (< \$500) per transaction (individual phone or on-line orders against the Blanket purchase order number) unless pre-approved at the time of the Blanket creation
- Telephone or mandatory on-line ordering; time sensitive (perishable) or detailed supplier interaction required at the time of ordering
- Product is unknown, quantity is unknown and the estimated encumbrance for the term is known

USES:

Ordering unspecified quantities of unknown products from one supplier. Perishable goods, oligos, electronic subscriptions, electronic testing material, plant services.

COMPLETING THE NON-CATALOG FORM

Use the following fields to add information about the order:

- **Supplier:** Select a non-catalog supplier
- **Catalog No.:** Enter **B-FY09** (This signifies Blanket order in Fiscal Year 2009)
- **Description** example: Repair of freezers in Galvin. Blanket order... Not to exceed (enter \$ amount). State the effective term, e.g. "effective July 1, 200x through June 30, 200x".
- **Quantity:** Enter quantity of 1
- **Estimated Price:** Estimated yearly expenditure
- **Unit of Measure:** LO (lot)

Non-catalog form:



The screenshot shows a web-based form titled "Non-Catalog Form". At the top, it says "Herrman & Goetz Inc. change...". Below this, there's a section for "Hide distribution methods" and a note: "The system will distribute purchase orders using the method(s) indicated below:". The main part of the form is a table with the following columns: "Product Description", "Catalog No.", "Quantity", "Price Estimate", and "Unit of Measure". The "Product Description" field is filled with the text: "Repair of freezers in Galvin. Blanket order... Not to exceed (enter \$ amount). State the effective term, e.g. 'effective July 1, 200x through June 30, 200x'". The "Catalog No." field contains "B-FY09", "Quantity" is "1", "Price Estimate" is "\$5,000.00", and "Unit of Measure" is "LO - Lot". Below the table, there's a section for "99 characters remaining" with an "expand | clear" link. At the bottom, there are three checkboxes: "Controlled substance", "Hazardous material", and "Radioactive", all of which are unchecked. At the very bottom, there are three buttons: "Save and Close", "Save and Add Another Item", and "Close".

COMPLETING THE CART

Save and Close

Edit the Shopping Cart

Header Information fields for information about the entire requisition:

- **GENERAL: Select Priority: Normal**
- **INTERNAL INFORMATION:** Use the fields for additional internal information.
- **SUPPLIER INFORMATION:**
 - Enter details of the blanket order in the **Note to all Suppliers**. (up to 1,000 characters allowed). See example below.
 - Add attachments for the vendor if needed.
- **Codes and FOAPAL** tab:
 - Verify/change **Codes and FOAPAL** information.
- **PR Approvals** tab
 - View the approval workflow for the requisition.
- **Submit Requisition:**
 - A **Requisition No.** will be generated and the workflow process will begin.

The requisition will enter workflow approval and will be reviewed by a Procurement Specialist. When the requisition is approved a Purchase Order will be issued and sent to the supplier. Releases (orders) may be made using this purchase order number.

Cart/Requisition:

The screenshot shows the 'Requisition' form with tabs for Summary, Internal Info, Shipping, Billing, Codes and FOAPAL, and Supplier Info. The 'General' tab is active, showing fields for Cart Name (Galvin Blanket Order), Priority (Normal), Prepared by (Diane Kennedy), and Original Submitter (Diane Kennedy). The 'Internal Info' tab shows Force Dept Approval (No), Note to Procurement (no value), Pricing Source (no value), Internal Note (no note), Internal attachments, and Next approver (Vaibhav Aganial). The 'Supplier Info' tab shows Req Type (Standard PO), Shipping Instruction (no value), Contract/Quote No. (no value), Contact (no value), Note to all Suppliers (This blanket order will cover expenses associated with Quote #), Accounting Date (no value), Attachments for all suppliers, and Additional Notes or Clauses? (no clause). Red circles highlight the 'Cart Name' field and the 'Note to all Suppliers' field.

ORDERING PRODUCTS AGAINST THE BLANKET ORDER

Requestor provides the assigned purchase order number when ordering from the supplier against the Blanket.

RECEIVING AGAINST THE BLANKET ORDER

Receipts Posted against Blanket orders will be posted as **Cost Receipts**. Cost Receipts should only be used for Blanket type purchase orders that have a quantity of one and an estimated yearly (term) price.

Search for and view the Blanket Purchase Order you want to create a cost receipt against.

- Click on the PO number to open it.
- Click Create Cost Receipt from the Available Actions drop down

Create Cost Receipt: from Available Actions

Summary - PO 7890229

PO/Reference No. 7890229
Supplier Office Depot

Available Actions: Create Cost Receipt

The original default cost (dollar) amount to be received will be the original estimated price.

New Cost Receipt with original PO encumbrance:

Save For Selected Lines: Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty / Cost Ordered	Previous Receipts	Cost	Action	Select
20029503	1	Pendaflex(R) Recycled Printed Notes Folders With 1 Fastener, 1/3 Cut, 8 1/2 x 11, Assorted Colors, Pack Of 30	677776	127.73		127.73	Cost Received	<input type="checkbox"/>
20029503	2	Avery(R) Quick-Load Nonstick Sheet Protectors, Heavyweight, Diamond Clear, Box Of 30	939937	54.72		54.72	Cost Received	<input type="checkbox"/>

Save

Enter the dollar amount to be received based on the ordered/invoiced price.

- Click **Save** and **Complete**.

Enter invoice amount invoice:

Save For Selected Lines: Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty / Cost Ordered	Previous Receipts	Cost	Action	Select
20029503	1	Pendaflex(R) Recycled Printed Notes Folders With 1 Fastener, 1/3 Cut, 8 1/2 x 11, Assorted Colors, Pack Of 30	677776	127.73		127.73	Cost Received	<input type="checkbox"/>
20029503	2	Avery(R) Quick-Load Nonstick Sheet Protectors, Heavyweight, Diamond Clear, Box Of 30	939937	54.72		54.72	Cost Received	<input type="checkbox"/>

Save

For subsequent receipts, any remaining encumbrance will be the default when the user begins to enter a new cost receipt. (Original estimated price – any cost receipts entered to date). Enter the dollar amount of the next receipt, click **Save** and **Complete**.