Creating a Blanket Order

If you have a supplier that you raise a lot of ad-hoc requisitions, or pay on a monthly basis throughout a year, it may be quicker and easier to raise one requisition for a blanket amount to cover a whole year and then just receive the ex-GST invoice amount as it comes in. This way the supplier only needs to quote one PO number on all your invoices, and you can control the amount and timing of their payment using the receiving function.

IMPORTANT!

If you are going to create a blanket order, it is absolutely essential that you receive the portion due for payment in a timely fashion, otherwise payment will not go out to the supplier and the whole process will fail.

For step-by-step instructions on how to receive against a blanket order, see Receiving against a blanket order [PO-024].

Blanket requisitions still must go through the same approval process as normal requisitions, so keep this in mind when creating blanket orders for suppliers that you spend a lot of money with over a year as one requisition for a really big amount may need to go to the Dean / Director for approval.

A blanket requisition doesn’t have to cover a whole year – it can be for any finite period of your choice.

To create a blanket order in iProcurement

Responsibility: ECU Purchasing User

1. (N) iProcurement Homepage.

   This will display the iProcurement homepage.

   ![iProcurement Homepage](image)

2. (H) Non-Catalog Request on the Shop tab.
3. Enter the **Supplier Name** (make use of the % wildcard).

**Example:** ABACUS CALCULATORS WA PTY LIMITED.

4. If the search criteria you entered in the Supplier Name field matched only one supplier in the system then the Site field should already be completed for you (and the Contact Name and Phone fields also, if there are values stored in them). If so, go to step 5, otherwise scroll through the Search and Select list of values and click the Quick Select icon for the Supplier and Site you want.

! IMPORTANT!

When you use the Quick Select icon the system will close the popup window and populate the original screen with the value you selected.

5. Change the **Item Type** from “Goods billed by quantity” to “Goods or services billed by amount” by clicking on the down arrow indicated at the end of the Item Type field.
! IMPORTANT !

The Quantity, Unit of Measure and Unit Price fields are not required and are removed. They are all replaced with a single field called Amount.

We use the “Goods or services billed by amount” Item Type so that we receive a dollar value when an invoice comes in, as this is much easier than trying to work out the percentage portion.

6. Enter the Item Description to describe the goods / service you are requesting. Make sure to indicate that this order is covering a period of time.

Example: Monthly photocopier billing JAN-07 to DEC-07.

7. Select the purchasing Category by typing in a value surrounded by the % wildcard.

Example categories:
- Printing and Photocopying, Copier Service Costs (a/c 4402), or
- Printing and Photocopying, Variable Copy Costs Service Agreements (a/c 4403)

8. Enter the GST exclusive blanket Amount you want to request be committed to the Supplier for the purpose outlined in the Item Description field.

! IMPORTANT !

Remember, this should be the ex-GST amount as all requisitions are raised without GST. GST only comes into play when the invoice is raised.

9. The Currency defaults to AUD but you can use the down arrow at the end of the field to change it to any other valid currency.

10. (B) Add to Cart. When you add items to Cart they should then appear in your Shopping Cart on the top right of screen.
11. If you want to add more lines to this requisition, change the details to reflect the new item. Fields that should be considered for change are:

- Item Description
- Category
- Amount

! IMPORTANT!

Remember to change the Item Description for additional lines, because if you don’t the system will group lines with the exact same description.

EXAMPLE: You order 15 widgets at $4.50 on line 1, and 27 widgets at $3.25 on line 2. When the requisition is converted to a purchase order the system will order 42 widgets at $3.25 (it will sum the quantity and take the best price).

NOTE: Remember to add each individual item to cart before moving on to the next one.
12. (B) **View Cart and Checkout** when you have added all the lines that you want for this requisition.

12a   This is your last chance to delete a line, or change the Description or Quantity Ordered (in this case the dollar value that you want to commit).

13. (B) **Checkout** to progress to the ‘Checkout: Requisition Information’ screen.

14. The Requisition Description defaults the value from the first requisition line into Item Description. Change it to be more meaningful.
Suggestion: Monthly photocopier billings (blanket 2007).

If you need to change the default expense account, or split the expense across multiple charge accounts, please see Changing / Splitting Charge Accounts [PO-041].

If you need to change the deliver-to location, please see Changing the Delivery Address [PO-044].

15. **(B) Next** to progress to the 'Checkout: Review Approver List' screen.

16. Confirm that the Approver Name is correct. If it isn’t see Changing the First Approver [PO-043].

17. If you need to add another approver, see Adding Another Approver [PO-042].

**IMPORTANT!**

Hanlon, Elaine is the top of the purchasing approval hierarchy. If she is listed as your approver, then there is a problem – no-one between you and the top of the hierarchy tree can approve for the dollar amount and the flexfield(s) you have quoted on your requisition. If this is the case, save your requisition by clicking the Save button and call FBSC Systems on ext 2772 to find out why. See Retrieving a Shopping Cart [PO-034] when you are ready to complete your requisition.
18. If you need to add an attachment to the approver, please see Adding an Attachment to the Approver [PO-045].

19. (B) **Next** to progress to the ‘Checkout: Review and Submit Requisition’ screen.

20. Check over the details of the requisition to make sure you are 100% happy with them. To see charge account details, click the **Show** link.

21. (B) **Back** to make other checkout changes if you are not completely satisfied with the requisition,

22. (B) **Submit** if you are completely happy with the requisition.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>Take note of the Requisition Number in case you need to query it with the Approver, or the FBSC Systems team.</td>
</tr>
</tbody>
</table>