Create a Blanket Purchase Order

A Blanket Purchase Order (BPO) is an order for goods/services at a predetermined price for a specified period of time (usually one fiscal year). An example includes copy machine maintenance. BPO's are not used to purchase fixed assets, sensitive equipment or items costing between $1,000 and $5,000. Also, BPO's are not needed for office supplies from Office Max or bottled water. Please review the University Payment Matrix for more information.

Procedures:

1. Navigation: Main Menu > Purchasing > Requisitions > **Add / Update Requisitions**
2. Add a new value (if your first time creating a PR). Otherwise click Find Existing Value.
3. Requisitions > Click on Requisitions Defaults link
    a. Accept "**Default**"
    b. **Buyer –** enter buyer name
    c. **Vendor** – look up using short description and enter
    d. **Unit of Measurement** – enter **LOT**
    e. **Category –** enter category code (will enter a default account)
    f. **Ship to** - always accept default (RECEIVING)
    g. **Distribute by** – enter **Amount**
    h. **GL Unit** – enter GL Unit (e.g. MB000)
    i. **Fund** – enter fund (e.g. MB500)
    j. **Dept** – enter Department ID
    k. Click **OK.** (This will return you to the Requisition page)

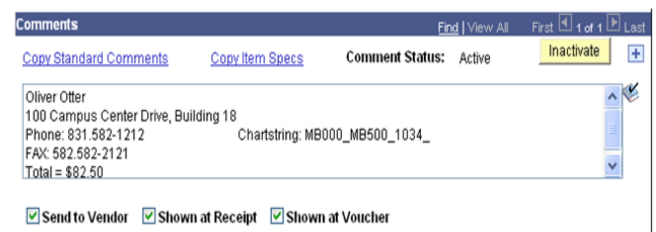
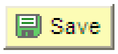


Figure 1: Line Comments

2. Add Comments
    a. Enter name, phone and building for person creating the request (you) along with the chartfield string.
    b. Check send to Vendor, shown at receipt, shown at voucher (all three).
4. Lines Details Section
    c. **Description** – enter detailed description of the order, terms and the amount of the service agreement here
    d. **Requisition Quantity** – enter **"1"**
    e. **Price** – enter TOTAL $ amount of Purchase Requisition for entire term of the agreement.
    f. Add more lines for additional items here **'+'.**
    g. Click **OK.**
    h. Click Save (Requisition ID is assigned).
5. Line Comments
    i. Use this area to enter comments specific to the individual Line Item.
6. For Split Distributions
   You may choose to enter all chart field information here and not the Requisitions Header):
    j. Schedule Tab > Click on Distribution link
    k. Click **OK**.
7. Verify info on header, line and $ totals are correct.
8. If budget check is not greyed out, click to approve budget (you MUST click on budget check to confirm that account and budget is valid for department).

9. Click 

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10. Write down Requisition ID# or highlight and copy ID# to use for running print process.

Print

1. Main Menu > Purchasing > Requisitions > Reports > **Print Requisition**.
2. Create Run Control ID – Purch_Req (or use existing one).
3. Enter Business Unit, Requisition ID, click on **Select all** – to check all statuses.
4. Click on Save, click Run.
5. Click Ok.
6. Click Report Manager link, then open the Administration Tab
7. Click **Refresh** until: Success, Posted, appears.
8. Click the Details link.
9. Click on the File Name(.pdf). The file will open.
10. Click the printer icon to print the Requisition
11. Sign out. Get signed and forward to Purchasing.

Receipting and Submitting Invoices to AP for payment:

1. Verify that the invoice amount matches the PO (PO Inquiry below).
2. Verify: amount, unit price, Amt/Quantity, tax. If different, resolve with vendor.
3. Note the following **on the Invoice**: received by name, date, P.O. #, account number, amount, final bill (Y/N)
4. Note the PO Line number next to the applicable invoice amount.
5. Obtain signature from approving manager and return to Accounts Payable.

Data Warehouse

To follow up on the status of a completed Purchase Requisition, you may use various tabs in you Manage My Budget Dashboard including:

1. **Department –** review MTD and/or YTD Actuals for payments to purchases. Drill on YTD Encumbrances to see all encumbrances and associated payments against encumbrances.
2. **Project** - review MTD and/or YTD Actuals for payments to purchases. Drill on YTD Encumbrances to see all encumbrances and associated payments against encumbrances.
3. **Open PO –** View remaining encumbrance balances for all open purchase orders. Drill on PO ID# to see transaction details for specific PO's.
4. **Open Req** – View list or requisitions that have not been converted to a purchase order. Update Requisition in CFS as required.

CFS Inquiry Pages

To follow up on the status of a completed Purchase Requisition, you may use one or more of the following inquiry pages (see separate job aids for details):

1. **Requisition Document Status** – Main Menu > Purchasing Requisitions > Document Status
2. **Requisition Inquiry** - Main Menu > Purchasing > Requisitions > Requisitions
3. **PO Inquiry -** Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders
4. **PO CSU Remaining Balance Inquiry-** Main Menu > Purchasing > Purchase Orders > Review PO Information > CUS Remaining Balance Inquiry

Remember!

- Manage your Open PO's.
- Review encumbrances monthly using the Data Warehouse.
- Un-encumber cancelled or completed Purchase Orders.