STANDING (BLANKET) ORDERS

I. CREATING STANDING ORDERS

1. In the ‘Shop’ tab select ‘Non-Catalog Request’.
2. From the dropdown menu under ‘Item type’ select ‘Goods or services billed by amount’.
3. Provide all the necessary information.
   - Description – goods or service information (if requisition is for goods based on a quote please provide the quote number)
   - Amount – total dollar amount based either on a quote or the recurring payments you expect to be making over the duration of the contract or until the order is fulfilled.
   - Supplier name
   - Supplier site
4. Click ‘add to cart’.
5. Proceed to checkout.
   Note: You can add multiple lines to the requisition which you can then assign different account coding to.
6. In the Checkout screen enter the Requisition Description and confirm that the Charge Account information is correct. **Important**: Please note that after the order is approved you will not be able to change the coding information and all the invoices paid under this PO will be charged to the account provided when creating the requisition.

7. Uncheck the ‘Use Central Administration Bill To Address’ and enter your information in the fields provided above. This will ensure that the vendor will send the invoices to you directly, so you can confirm their accuracy before submitting them for payment.

8. In the ‘Checkout: Review Approver List’ enter any information you this your Approver and/or Supplier might find helpful.

9. If you have a quote from the vendor, attach it by clicking the ‘Add Attachments’ button.
10. Proceed to submit your requisition to the approval hierarchy.
11. After your requisition is approved it will generate a unique purchase order number, beginning with 70000(...) which you can then ask the vendor to reference on the individual invoices.

II. PAYING INVOICES AGAINST STANDING ORDERS

1. Go to the ‘Receiving’ tab.
2. Choose the PO you’d like to receive against and click on the requisition number (do not ‘Express Receive’). If the PO is not showing up in your ‘Requisitions to receive’ list on the main Receiving screen, enter the PO number in the search box.

3. After clicking on the requisition number, click on the ‘Receive’ button.

4. Check off the ‘Select box’ and enter the amount you wish to receive. Click ‘Next’

5. In the ‘Receipt comments’ box enter the invoice number and the date of the invoice. Click ‘Next’.

6. On the next screen click ‘Submit’.
Next time when you bring your PO up in the Receiving screen you will notice that the dollar amount of the original requisition has been reduced by the amount of the invoice you received. You can continue receiving invoices against this PO until the amount left drops to $0.