

# Unimarket Blanket Order User Guide

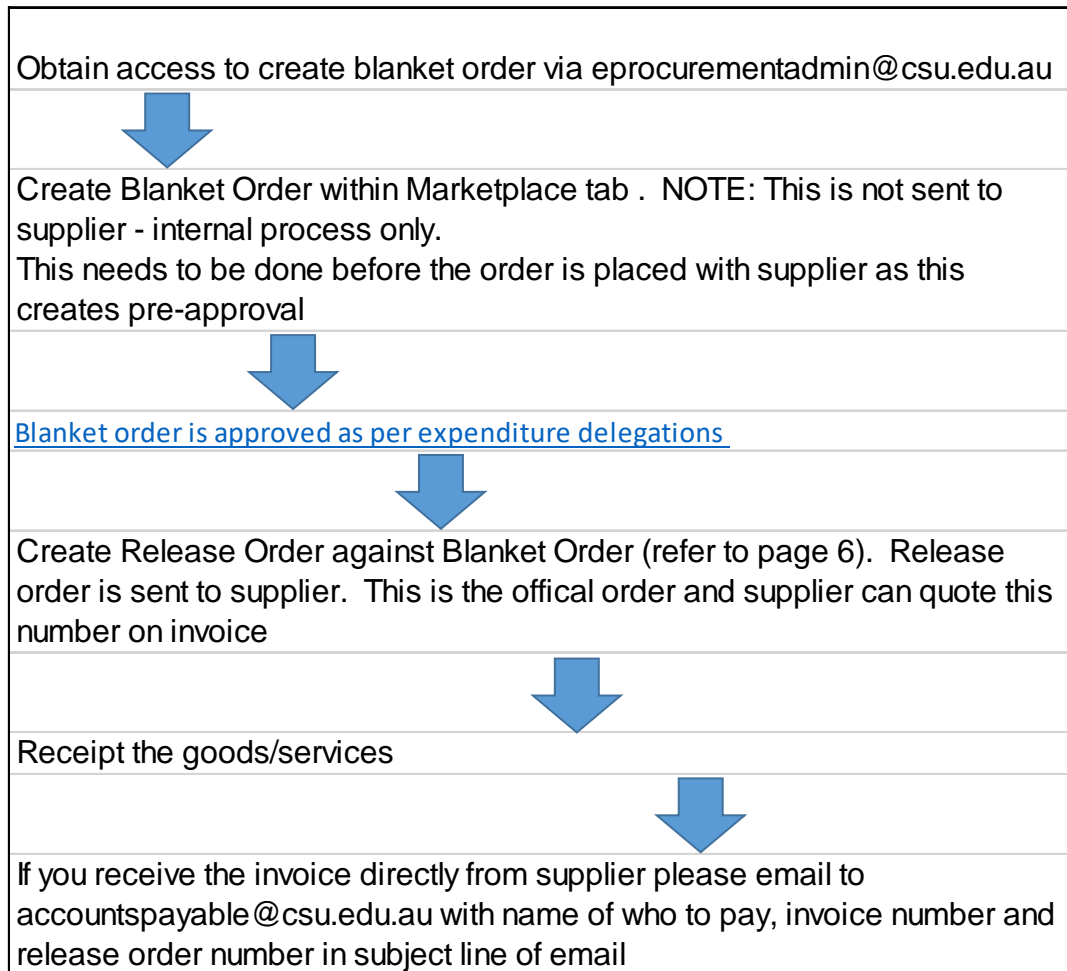
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## Blanket Order User Guide

- Unimarket has a Blanket Order function which provides the ability to create an order for the provision of unspecified products and services from one supplier, over a specified time-frame for one set of account codes.
- The Blanket Order provides pre-approval for products and services on a purchase-on-demand basis. Blanket Orders follow the standard expenditure approval process.
- A Blanket Order should only be used if the volume and the mix of goods or services is unknown. For example there is a known spend with a bakery each year, but the mix of goods received in each order is unknown.
- A Unimarket Buyer must have additional access to create Blanket Orders. This can be obtained from [eprocurementadmin@csu.edu.au](mailto:eprocurementadmin@csu.edu.au).
- Once a Blanket Order is in place, the standard item selection/creation and requisition process needs to be followed (see Buyer Guide). This creates a Release Order that the supplier provides the goods or services against. The receiving is completed against this Release Order and the invoice is also paid against the Release Order.
- The funds approved in the Blanket Order will be reduced by the value of each Release Order created.
- To make payment against a Blanket Order/create a Release Order, the user must be given access to the Blanket Order by the buyer.
- NOTE: The Account Codes cannot be split in a Blanket Order. The account code will be the same for each Release Order. If you require the ability to cost every Release Order differently a Blanket Order SHOULD NOT BE USED
- In the event that this procedure is not followed, a user can create a **Retrofit** order to process an invoice that has already been received. An explanation of why normal procedure was not followed may be required. When using a Blanket Order for the approval of a Retrofit order, the order is known as a Retrofit Release Order.

## Blanket Order Process Flow Chart



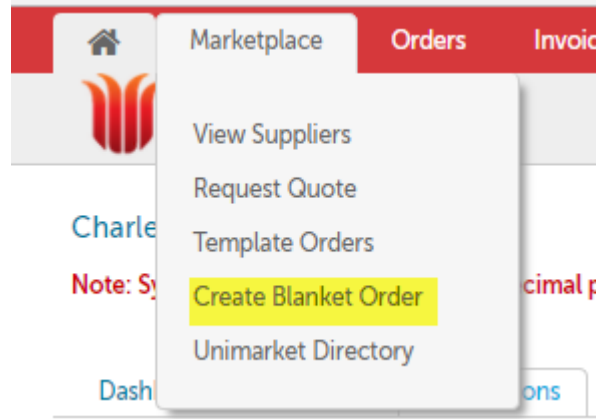
Expenditure Delegations can be found here: <http://finance.csu.edu.au/policies#expenditure-delegations>

[eprocurementadmin@csu.edu.au](mailto:eprocurementadmin@csu.edu.au)

[accountspayable@csu.edu.au](mailto:accountspayable@csu.edu.au)

## Creating a Blanket Order

- Select 'Marketplace' and choose Create Blanket Order from the drop down list. If you do not see 'Create Blanket Order' please contact [eProcurementadmin@csu.edu.au](mailto:eProcurementadmin@csu.edu.au) to check your allocated roles in Unimarket.



### Create Blanket Order

#### Details

Name *	<input type="text"/>
Description	<div style="border: 1px solid #ccc; height: 80px;"></div>

- The 'Name' field is free form. The name should identify details of the Blanket Order. Note: there may be multiple Blanket Orders on one supplier, so the name to identify the Blanket Order should be unique but also able to be searched easily.
- The 'Description' field is an area to put more details of the Blanket Order. This information can help distinguish between Blanket Orders with similar names.

Supplier *	<input type="text"/>	Amount *	<input type="text"/>
Valid From *	14/02/2018 7:12:00 AM	Valid To *	<input type="text"/> 7:11:59 PM
Default Account Code *	5 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 0000 <input type="button" value="X"/> <input type="button" value="Refresh"/> <input type="button" value="Split"/>		
<input type="checkbox"/> Allow Release Order Coding <input type="button" value="Info"/>			

- Select the 'Supplier' for the Blanket Order.
- The 'Amount' is how much the Blanket Order will be approved for, **INCLUDING GST**. This is the only time in Unimarket you enter a GST inclusive amount (this is to allow the Banner to account for the whole spend). If you do not include the GST amount, Banner will not allow payment of the final 10% of your Blanket Order and a new order will need to be created.
- Valid 'To' and 'From' fields will determine when the Blanket Order is visible to users to access for purchasing. The 'To' date should not exceed 31<sup>st</sup> of December of the current year.
- The Account code cannot be split – one account code is required per Blanket Order. The account code will be the same for each release order, if you require the ability to cost every release order differently a Blanket Order should not be used.

- Allow Release Order Coding SHOULD NOT be checked. This is not a function that will work for CSU.

Tax Sensitive

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Ship To \*

Attn \*

Charles Sturt University [482]  
Building 482 - Office Accommodation  
Nathan Cobb Drive West  
Wagga Wagga  
2678  
Australia

Bill To \*

Attn:Accounts Payable  
Charles Sturt University [1111]  
accountspayable@csu.edu.au  
Locked Bag 677  
Wagga Wagga  
2678  
Australia

- No entry is required in the tax area as this can be changed on the release order.
- Do not select sensitive as other team members will not be able to search for this order.
- 'Ship To' should be the requestor's location and 'Bill To' will not need to be changed.

Available To \*

Attachments [+ Add Attachment »](#)

- 'Available To' is for the name of everyone who needs to be able to create Release Orders against this Blanket Order. This area can be edited after the Blanket Order is created. You can add as many names as you require.
- Add any relevant attachments that support either the choice of supplier and/or the value of the order, i.e. quotes, supplier agreements etc. You can attach multiple PDF files.

#### Notifications

Send to Supplier

Hide Amount from Supplier

Alert Amount \$

Alert Date   :

#### Justification

Justification \*

Justification Attachments [+ Add Attachment »](#)

#### Approvals

Organisation Unit \*

- 'Send to Supplier' SHOULD NOT be selected. The Blanket Order is being used as an internal record for the approval of funds and is not to be sent to the supplier.
- 'Hide Amount from Supplier' SHOULD remain selected, in the event the order is incorrectly sent to the supplier we do not need the supplier to know the total of the Blanket Order
- 'Justification' and 'Justification Attachments' is where you can record why this Blanket Order is being created. Include any minutes, e-mails etc. that support the approval. Multiple PDFs can be attached if required.
- 'Organisation Unit' is the work area the Blanket Order is being created for. If you are in an Operations or Admin team and creating the Blanket Order for a different work area, you can change the 'Organisation Unit' here.
- Once you have checked the details you have entered and everything is correct, select 'Create'

## Using a Blanket Order

- Normal process is to be followed as per 'Buyer Guide' to identify the items to be purchased and add them to your cart.
- When you 'Checkout' the items to create the requisition you will see something similar to below

### Checkout

▼ Locations Charles Sturt University / Charles Sturt University

Ship To \* 289 - National Life Sciences Hub x ▼

Attn \* Adrian Whiting  
Charles Sturt University [289]  
Building 289 - National Life Sciences Hub  
Nathan Cobb Drive West  
Wagga Wagga  
2678  
Australia

Bill To \* 1111 - Accounts Payable x ▼

Attn:Accounts Payable  
Charles Sturt University [1111]  
accountspayable@csu.edu.au  
Locked Bag 677  
Wagga Wagga  
2678  
Australia

▼ Order Type Standard


Sensitive

Retrofit Order

Order Submission \* Send Electronically ▼

Life Technologies Australia + Add Notes

**Warning:** This supplier has order integration enabled, and so may not see these Notes or Order Attachments.

Product	Qty.	Subtotal	Tax
 <b>Test Item 2</b> Unit Price: \$12.00 / Each Delivery Date <input type="text" value="7"/> / <input type="text" value="12"/> : <input type="text" value="00"/> PM Account <input type="text" value="5"/> <input type="text" value="A102"/> <input type="text" value="6333"/> <input type="text" value="358"/> <input type="text" value="0000"/> <input type="button" value="x"/> <input type="button" value="c"/> <input type="button" value="d"/> <input type="button" value="Split"/>	<input type="text" value="1"/>	\$12.00	\$1.20 <input type="button" value="x"/> Remove <input type="button" value="i"/> Edit
Subtotal		\$12.00	\$1.20
Shipping * <input type="button" value="i"/>		\$ <input type="text" value="0"/>	\$0.00 ▼
Tax		\$1.20	
Total		\$13.20	

Delivery Notes

Order Attachments  + Add Attachment ▶

Blanket Order

Order Receiving \*  ▼


- Complete the top panel as per a normal requisition, i.e. Ship To location. If you already have an invoice, this will be a Retrofit Release Order and this will need to be ticked
- At the bottom of this panel is 'Blanket Order'. Select the arrow to see the Blanket Orders that are available for this supplier.

Blanket Order

Requisition

**PU014076 - Life Tech Integration Testing**

- If you cannot see a Blanket Order that you believe should be available, it could be out of date, out of funds, closed for some other reason or you may not have been given access to the Blanket Order. Contact [eProcurementadmin@csu.edu.au](mailto:eProcurementadmin@csu.edu.au) (34444) and they can tell you the status of the Blanket Order and/or advise you of who created the Blanket Order, so that you can ask for your name to be added to the available users.

Product	Qty.	Subtotal	Tax
 <b>Test</b> Unit Price: \$12.00 / Each Delivery Date <input type="text" value="7"/> / <input type="text" value="12"/> : <input type="text" value="00"/> <input type="text" value="PM"/> <input type="button" value="⌵"/> Account 5-A102-6333-358-0000	<input type="text" value="1"/>	\$12.00	\$1.20 <input type="button" value="⌵"/> <input type="button" value="Remove"/> <input type="button" value="Edit"/>
Subtotal		\$12.00	\$1.20
Shipping* <input type="button" value="⌵"/>		\$ <input type="text" value="0"/>	\$0.00 <input type="button" value="⌵"/>
Tax		\$1.20	
Total		\$13.20	
Delivery Notes <input type="text"/>		Order Attachments <input type="button" value="⌵"/> <input type="button" value="+ Add Attachment »"/>	

- Once you select the Blanket Order, the panel will change. You can still add the 'Delivery Date', adjust 'Tax' or add 'Shipping' as required. You can still also add attachments. The accounting information will be what was on the Blanket Order.

- Select 'Checkout' once you have entered and reviewed the details of your requisition.
- You will immediately see the Release Order has been created.



## Order PU014077

Charles Sturt University QA > Life Technologies Australia

### Release Order

Order Number <b>PU014077</b>	Blanket Order <b>PU014076</b>
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- If you have created a 'Retrofit' release order, the Release Order number has to be noted on the supplier invoice and the invoice emailed to [accountspayable@csu.edu.au](mailto:accountspayable@csu.edu.au) with the name of who we are to pay, the invoice number and/or the Release Order number in the subject line of the email.
- The items on the Release Order will need to be received – see the Receiving User Guide.

### Need Support?

- If you experience any issues, please contact the Unimarket Administrator on
  - Internal Phone: 34444
  - External Phone: (02) 69334444
  - Email: [eProcurementAdmin@csu.edu.au](mailto:eProcurementAdmin@csu.edu.au)
- Information can also be found at <http://finance.csu.edu.au/purchasing-procurement>