

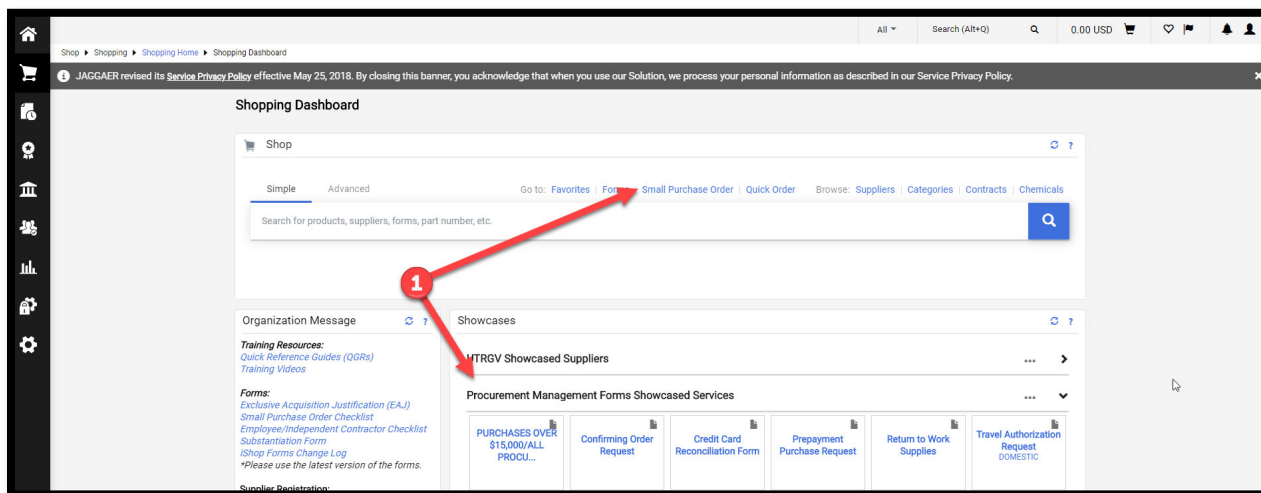
iShopUTRGV Quick Reference Guide

How to - Create a Blanket Purchase Order

Payment against Purchase Orders is dependent on the quantity. If the quantity '1' is used, payment can only be issued one time. If a PO is being generated to process multiple payments, it must be processed as a Blanket Order with the quantity as '1' and the unit price as the full amount of the order. *Questions can be emailed to: ishop@utrgv.edu

Confirm the full amount of the request.

**Note: If the full amount is less than \$15,000, process through the Small Purchase Order. If the full amount is more than \$15,000 or is a restricted item, it must be processed through the applicable form.*



Complete the required information of the request.

- Select Supplier. If supplier is not set up, please follow the vendor set up process.
- Verify distribution. This is the method in which your PO will be distributed to the vendor.
- Add a description. Be sure to include the term "Blanket Order"
- Quantity should always be 1
- Unit price should be the full amount

Description *	Catalog No.	Size	Quantity *	Price	Packaging *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

Additional Details

Taxable	<input type="checkbox"/>	Capital Expense	<input type="checkbox"/>	Product Flags
Commodity Code	<input type="text"/>	Manufacturer Name	<input type="text"/>	<input type="checkbox"/> Controlled substance
Manufacturer Part No	<input type="text"/>	UNSPSC	<input type="text"/>	<input type="checkbox"/> Recycled
				<input type="checkbox"/> Hazardous material
				<input type="checkbox"/> Radioactive
				<input type="checkbox"/> ECCN
				<input type="checkbox"/> ITAR

Once information has been completed, click on "Save"

The screenshot shows the 'Add Non-Catalog Item' form. Red arrows point to the 'Supplier' dropdown menu, the search box containing 'MOUSER ELECTRONICS INC', the 'Distribution Methods' section, the 'Item' table with columns for Description, Catalog No., Size, Quantity, Price, and Packaging, and the 'Save' button at the bottom right.

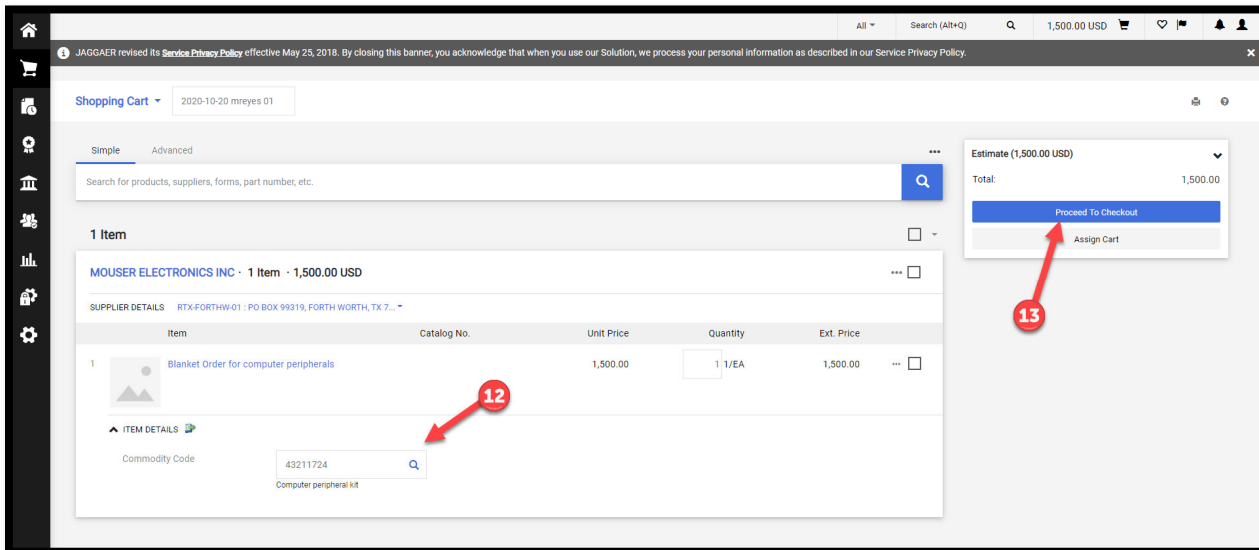
Window will close. Click on the dollar amount on the upper righthand corner, followed by "View My Cart"

The screenshot shows the Shopping Dashboard with a 'My Cart (2020-10-20 mreyes 01)' popup window. Red arrows point to the '1,500.00 USD' amount in the top right corner and the 'View My Cart' button in the popup window.

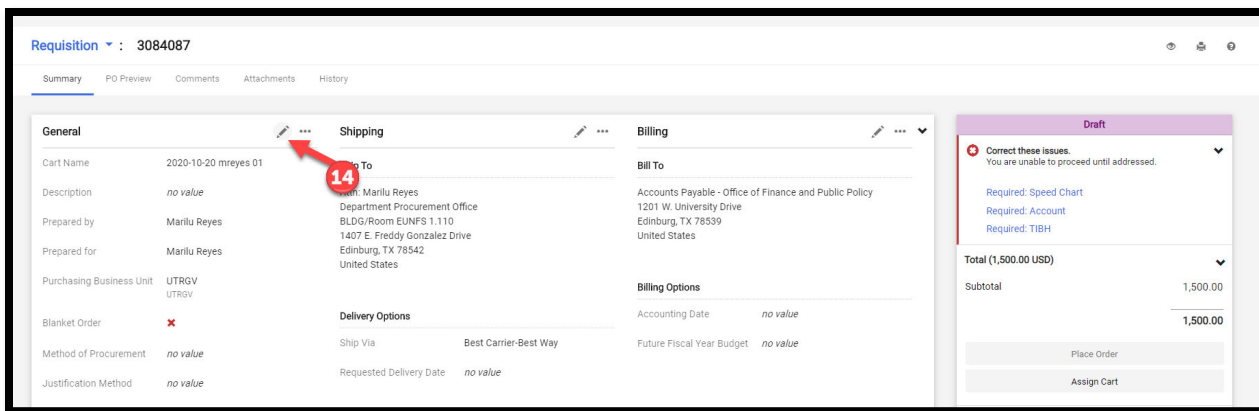
Cart will display. If there are any errors, please correct.

The screenshot shows the Shopping Cart page. A warning message is displayed: 'Be aware of these issues. You may review and proceed. Empty Commodity Code (Line 1)'. Red arrows point to the warning message and the search box for the commodity code, which is currently empty.

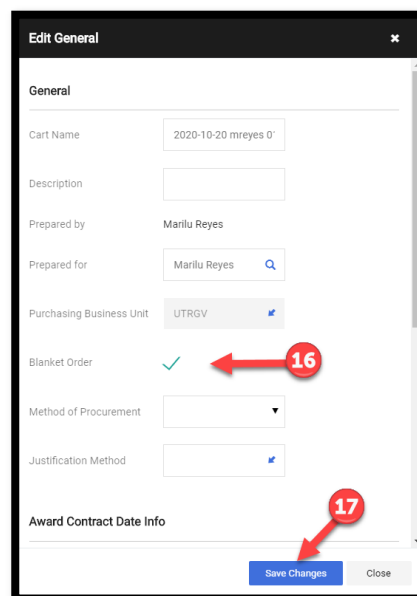
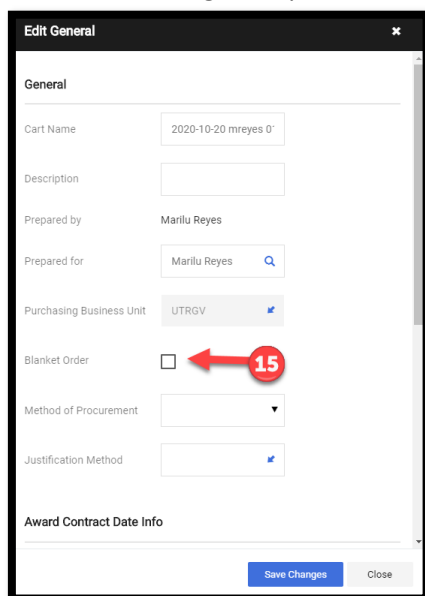
Once errors have been corrected, click on "Proceed to Checkout"



Draft Requisition will display. Click the pencil under the "General" Section



By default, the Blanket Order flag is not selected. Click on the box to select the Blanket Order option. Once selected, you will see a green checkmark confirming this option has been turned on. Click on "Save."



Screen will refresh and you will see the draft requisition. Ensure the Blanket Order flag is still enabled. If so, you can now click on “Assign Cart” and search for your departmental buyer so that they may complete the accounting information and submit to the workflow.

The screenshot displays a requisition draft for ID 3084087. The interface is divided into several sections: General, Shipping, Billing, and a Draft summary panel on the right. In the General section, the 'Blanket Order' checkbox is checked, highlighted by a red arrow with the number 18. The Draft summary panel on the right shows a total of 1,500.00 USD and includes an 'Assign Cart' button, which is highlighted by a red arrow with the number 19. The Draft panel also lists required items: Speed Chart, Account, and TIBH. Below the Draft panel, the 'What's next for my order?' section shows the next step as 'Approval Validation' and lists approvers: Lopez, Ms. Josefina; Rangel, Ms. Maggie D; Reyes, Ms. Marilu; and Rodriguez, Mrs. Donna E.

*Note: if you are aware of the accounting information, you may complete this prior to assigning. Reference “How to - Add/Change Account Codes at the Header/Line” Guide at www.utrgv.edu/procurement/training