Step-by-Step Instructions for Creating a Blanket Order Purchase Requisition (PR)

1. A blanket order PR can be created with a particular Supplier to encumber funds and ensure adequate budgetary resources are available to make purchases throughout the fiscal year. Blanket orders allow for multiple releases over a period of time and encumbrance occurs when the initial PR is fully approved. The process for creating a blanket order is similar to the process for creating a purchase requisition using a freeform line item.

   Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2. Click **Add Non-Catalog Item**.

   a) Populate the **Name** (e.g., Grainger Blanket Order), **Commodity**, **Ordered Quantity**, **Unit of Measure**, and **Delivery Date** fields.

   ▲ Populate the Commodity field with a code that best represents the item(s) on the purchase requisition. Please do not pick a code that ends with 00.

   ▲ If the blanket order will be used for Pcard payments Unit of Measure must be “AMT”

   b) Populate the **Supplier** and **Order Supplier** fields with the applicable Supplier:

      1) Click the **Selector** (↑) icon and type in the name of the Supplier in the Supplier field. If they do not appear initially, click **Select All** and search for the Supplier using Keywords and select the **Checkbox** (☐) icon next to the applicable Supplier.

      2) Select an **Order Supplier**. Note that you will be able to apply the blanket order to any subsequent purchase order with a given Supplier regardless of which Order Supplier record is used on the blanket PO.

   c) Populate the **Unit Price** field such that the resulting **Total Amount** is equal to the total amount of the blanket order.
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4. Click **Save & Close**.

5. Click **Checkout**.

6. In the **Type** field, select **Blanket/Encumbrance Order** from the drop-down menu.

7. Complete the remainder of the checkout process for your purchase requisition, including selecting an Organization, Ship To, and Bill to Address, entering chartfield information and adding any necessary comments and/or attachments to the purchase requisition.

8. Click **Submit Requisition**.

▲ Your purchase requisition (PR) will follow the approval process associated with your specific PR. Once it is fully approved and a blanket purchase order is created, Requesters or Requisitioners in your agency will be able to create releases from it.

▲ Full encumbrance occurs when the associated PR is fully approved.

▲ Each release will result in the creation of a purchase order that is sent to the Supplier.

▲ Suppliers will only see the items and quantities associated with a release, not the full details of the blanket order PR.
After a blanket order has been created and approved, any Requester or Requisitioner can create a PR and link it to the blanket order to create a release. Note that a release can be applied to hosted catalog, punchout catalog, or freeform line items from the associated Supplier as appropriate.

To create a release from a blanket order, add items to your cart from the Supplier the blanket order is for and then click **Checkout**.

In the **Type** field, select **Standard Purchase** from the drop-down menu.

If your release has multiple items, you can update multiple line items at by:

1. Clicking the **Checkbox (□) icon next to the items you would want to update.**
2. Clicking **Edit Lines.**

3. Making the desired updates once (e.g., Delivery Date, chartfield information, Blanket PO Line Item, etc.), and then clicking **Save & Close.**
If your purchase requisition only has one line item:
1. Click the **Pencil (✏️)** icon next to the item(s) you want to tie to a blanket order.
2. Populate the **Delivery Date** field.
3. Click **More Item Information**.
4. Populate the **Blanket PO Line Item** field.
   ▲ If the blanket order is tied to a specific Supplier (e.g., Grainger) and the items in your purchase requisition are from that Supplier, this field automatically populates.
   ▲ If the blanket order is not tied to a specific Supplier, click the **Selector (🔍)** icon in the Blanket PO Line Item field and then click **See All** at the bottom of the drop-down to find and select the applicable blanket order.

Click **Save & Close**. Complete the remainder of the checkout process for your purchase requisition, including selecting an Organization, Ship To, and Bill to Address, entering chartfield information and adding any necessary comments and/or attachments to the purchase requisition.

Click **Submit Requisition** to send your PR through the defined approval path and send a purchase order to the Supplier once approved.

*If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.sharedservices@obm.ohio.gov) or phone (877-644-6771).*