How to Create a Blanket Order PR

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

1. 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 field with the applicable Supplier:
   1) In the Supplier field, click the Selector (▼) icon and then click Select All.
   2) Type the name of the Supplier in the Keywords field and click Search.
   ▲ If the supplier is not yet known, select “ENC TYPE ENCUMBRANCES”
   3) Select the Checkbox (□) icon next to the applicable Supplier.

3. a) Populate the Unit Price field such that the resulting Total Amount is equal to the total amount of the blanket order.

4. Click Save & Close.
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5. Click Checkout.

6. a) In the Requisition Details box, populate the Organization field, which automatically populates the Ship To field.

   b) Click Show Advanced Options. Most Requesters can click Submit Requisition at this point unless they would like to add a Pcard.

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

8. Complete the remainder of the checkout process for your purchase requisition, including entering chartfield information and adding any necessary comments and/or attachments to the purchase requisition.

9. 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.
Step-by-Step Instructions for Creating a Release for a Blanket Order (PR)

1. ▲ 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.

To create a release from a blanket order:

a) Add items to your cart from the Supplier the blanket order is for and then click **Checkout**.

b) In the Checkout, click **Show Advanced Options**.

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

   b) In the **Receiving Required?** field, select either **Yes** or **No** based on your needs.

3. a) In the **Items** box, click the **Pencil** (.pen) icon next to the item(s) you want to tie to a blanket order.

   b) Populate the **Delivery Date** field.

   c) Click **More Item Information**.

   a) Populate the **Blanket Encumbrance 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** (.pen) icon in the Blanket Encumbrance Item field and then click **See All** at the bottom of the drop-down to find and select the applicable blanket order.

4. Click **Save & Close**.

5. 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 (**ohiosharedservices@ohio.gov**) or phone (**877-644-6771**).