

# Blanket Orders

A “Blanket Order” is a special type of [Direct Charge](#) that can be used to encumber an amount of money to be paid down over a period of time using multiple invoices. Blanket orders do not link to a line item or a bibliographic record.

## Things to Know

- The Blanket Order direct charge should only be added to purchase orders.
- A purchase order with a Blanket Order can also have line items.
- A purchase order can have multiple Blanket Order charges.
- A Blanket Order charge is considered open until its purchase order is “finalized” (received).
- “Finalizing” a purchase order changes the purchase order’s status to received (assuming there are no pending line items on the purchase order) and fully disencumbers all Blanket Order charges on the purchase order by setting the debit amount to \$0 on the original debit for the charge.

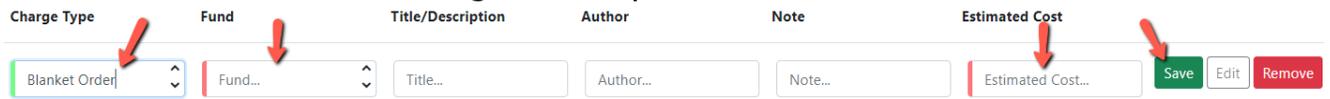
## Creating a Blanket Order

1. Create a purchase order by going to **Acquisitions** ⇒ **Create Purchase Order**.
2. Fill in the initial form.
  1. Select your **Ordering Agency** if it is not already selected.
  2. (Optional) Enter a name for the purchase order. The purchase order name must be unique and should be 10 characters or less.
  3. Select the **Provider** for the order.  This box is a typeahead box. Start typing and select from the list that appears.
  4. If prepayment is required for this order, check off the Prepayment Required box. Otherwise, leave it blank.
3. Click **Create**.
4. In the pending purchase order click the **New Charge** button at the bottom of

the purchase order.

Direct Charges, Taxes, Fees, etc. **New Charge** 

5. In the **Charge Type** drop down, select **Blanket Order** (required)
6. Select a fund in the **Fund** drop down (required)
7. Enter a **Title/Description** (optional but a good way to track what the expenditure was for as this field can be referenced in reports)
8. Enter an **Author** (optional)
9. Enter a **Note** (optional)
10. Enter the **Estimated Cost** of the blanket order.  This is the total amount you expect to pay. This amount will be paid down over time. (required)
11. Click **Save** to save the charge to the purchase order.



The screenshot shows a form with the following fields: Charge Type (dropdown with 'Blanket Order' selected), Fund (dropdown), Title/Description, Author, Note, and Estimated Cost. To the right of the Estimated Cost field are three buttons: Save (green), Edit (grey), and Remove (red). Red arrows point to the Charge Type, Fund, and Estimated Cost fields.

12. You can add additional charges by clicking the New Charge button.  You must save each charge you add.
13. When you have finished adding charges activate the purchase order by clicking on the **Activate Order** button.

- The estimated cost for the purchase order will be encumbered and a Finalize Blanket Order button will appear in the purchase order.
- You will also see Disencumber and Remove button next to each charge.

Estimated Amount:	\$500.00
Encumbered Amount:	\$500.00
Spent Amount:	\$0.00
Prepayment Required?	No

 Print | 
  Cancel Order | 
  Finalize Blanket Order

## To Edit a Blanket Order Charge

To edit a charge click the Edit button. Make your changes and then click the Save button.  Charges can not be edited once the purchase order has been activated.

# To Remove a Blanket Order Charge

To remove a charge click on the red Remove button to the right of the charge you want to remove.

## Invoicing Blanket Orders

### When you get an invoice for a blanket order:

1. Pull up the purchase order with the Blanket Order that the invoice will be applied to.
2. Click the Create Invoice button in the top part of the purchase order.
3. The charges will be pulled into the invoice.
4. Fill out the top of the invoice form.
5. - If this is the final invoice for the blanket order, check off the Final Invoice for Blanket Order box. When the invoice is closed this will cause the purchase order to be marked as Received and any remaining encumbrance will be dropped returning the unspent money to the fund.
6. - If this is NOT the final invoice for the blanket order, leave the the Final Invoice for Blanket Order box UNchecked.
7. If there are any charges not associated with the paper invoice, remove them by clicking the Delete link to the right of the charge.
8. Fill in the Billed and Paid amounts in the charge.
9. Click Close.

### When a purchase order needs to be finalized without a final invoice:

1. Retrieve the purchase order for the blanket charge you need to finalize.
2. Click on the Finalize Blanket Order button on the purchase order.

Prepayment Required? No

Activatable? Activated

Finalize Blanket Order

Notes (0)

EDI Messages (0)



3. - This will drop any remaining encumbrance and mark the purchase order as received.

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