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.

Create Purchase Order

Ordering Agency

Name (optional)

Provider

☐ Prepayment Required

Create

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 that appears, 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, Author, and Note** (optional but a good way to track what the expenditure was for as this field can be referenced in reports)

8. Enter the **Estimated Cost** of the blanket order. ⚠ This is the total amount you expect to pay for the order. This amount will be paid down over time. (required)

9. Click **Save** to save the charge to the purchase order. ⚠ You must individually save each charge you add.
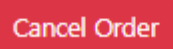

- The **Edit** button allows you to edit a saved charge. Click Save when you have finished editing.
- The **Remove** button allows you to remove a charge.

- You can add additional charges by clicking the **New Charge** button. ⚠ Be sure to click Save after each charge you add.

10. When you have finished adding charges activate the purchase order by clicking on the **Activate Order** button in the header of the PO.

- 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 a **Disencumber** and a **Remove** button next to each charge.

- The **Disencumber** button will disencumber the charge amount but the charge will remain in the PO as a reference. A dialog box appears asking you

to confirm that you want to disencumber the amount.

> When an invoice for a purchase order is created using the Create Invoice link in the top of the purchase order, the disencumbered charges will be pulled into the invoice and will need to be removed by clicking the Remove button next to the charge.

- The **Remove** button removes the charge from the PO completely and disencumbers the money.

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

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