

Promapp URL:

<https://au.promapp.com/otago/Process/Minimode/Permalink/BSiLt9XKeliRIOEY5zTL5r>

OVERVIEW

This guide shows you how to create a blanket order in Unimarket.

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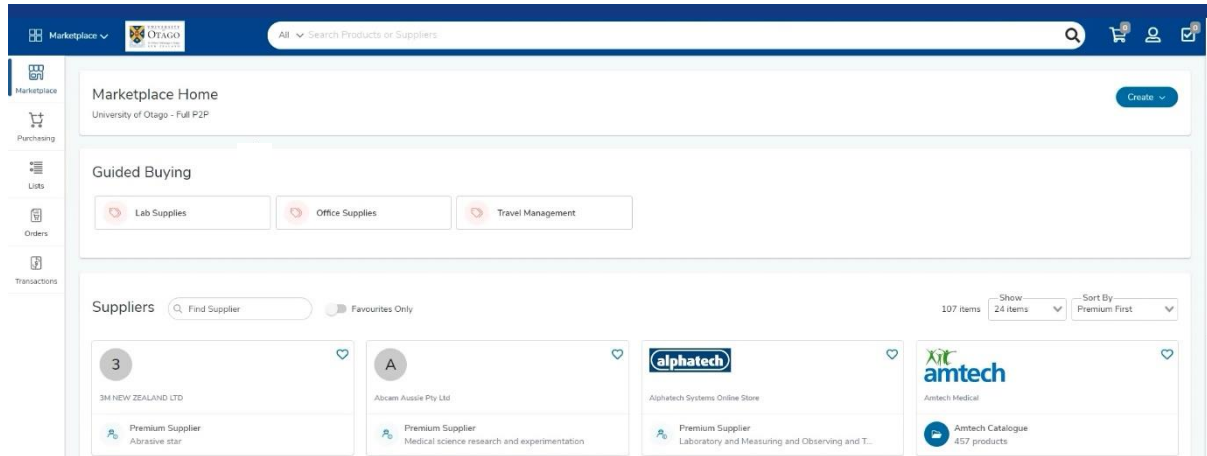
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BACKGROUND

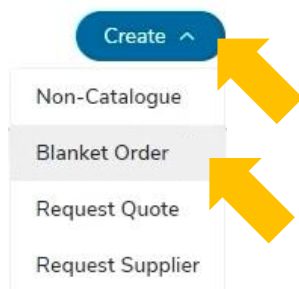
Creating a blanket order is useful when you know you are going to make multiple transactions of a similar type with one supplier. It provides the supplier with one Purchase Order number they can use for the entire year for those specific goods or services. For you, it means the funds are already approved, so it's just one approval process.

CREATE A BLANKET ORDER

1. Begin by opening the Unimarket homepage.



2. Click the 'Create' button on the top right of the homepage, and select 'Blanket Order'.



3. Enter a description in the 'Description' field.
4. You can add more information into the 'Details' box, if required. Be as descriptive as possible, so others know exactly what this blanket order is for.

Details

Description *

- To select a supplier, click on the dropdown arrow next to 'Supplier'. Scroll down to find the right company, or use the search bar.

Supplier *

▼

BOC

BOC Gases New Zealand Limited



- Enter an amount for the Blanket Order – this is the total amount you expect to spend with this supplier for the period of the blanket order.

Amount * \$


- Add the 'Valid From' and 'Valid To' dates for the blanket order.
The 'Valid From' field prepopulates to today's date. Click on the date and a calendar will pop up. Use the calendar to find the correct date.
Follow the same process to adjust the 'Valid To' date.

Valid From *

13/12/2022
🕒 12:00
AM ▼

🕒
Jan 2023
🕒

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



- Change the account, if you need to, by clicking on the dropdown menu and selecting a new one.

Fill in the account codes for the relevant account. If you don't have this information, click in the box and then click the magnifying glass icon to search for the code required. If you are unsure of which code to use, please check within your department, Finance Advisory or Supply Chain hub.

Default Account Code *

Account
General Ledger ▼

Entity
10

Cost Centre
LI

Activity Centre
A04

Dissection
3246

Subdissection
3246 - Gas Cylinders

⋮

Allow Release Order Coding ?




9. Check 'Ship To' address is correct. Click on the dropdown menu to select a new option if required.

Bill To * Accounts Payable [AP]
 PO Box 56
 Dunedin
 9054
 New Zealand

Ship To * University of Otago Mailroom [26C]
 Clocktower Building
 362 Leith St
 North Dunedin
 9016
 New Zealand

10. If you'd like anyone else to be able to view and use this blanket order, you need to add their names in the 'Available To' box. Click in the box and then begin typing the person's name. Once the correct name appears, click on it.

Available To *



11. Upload any relevant attachments, such as a quote in the 'Attachments' box.

Attachments

Drop files to attach, or browse

Size limit 50MB.

12. Tick the 'Send To Supplier' box if you'd like the supplier to be notified via email when this blanket order is approved.

If you don't want the supplier to see the full amount approved for the blanket order, leave the 'Hide Amount From Supplier' box ticked.

Notifications

Send to Supplier

Hide Amount from Supplier

13. You can set an alert to receive a notification when your blanket order funds drop below a certain amount. To do this, type the amount at which you'd like to get the notification next to 'Alert Amount'.

Alert Amount

14. You can also set up an alert to let you know when the blanket is about to expire. Click next to 'Alert Date' and select a date from the calendar for when you'd like to receive this notification. You can adjust the time as well.

Alert Date

15. Enter a comment in the Justification box, if you wish. This will be sent to the approver, not the supplier.

Justification

The justification and attachments are for review by the approver. They will not be sent to the supplier.

Justification
Annual gas cylinder rental

Justification Attachments
Drop files to attach, or browse
Size limit: 50MB

Justification Type

16. Select a 'Justification Type' if necessary and upload any relevant 'Justification Attachments'.

17. Once you've reviewed your request and would like to submit it, click 'Create' at the bottom of the page.



18. After the blanket order has been created, you can click into the comments tab to add additional information about the order and to view any other comments that have been added.

BOC Blanket Requisition RQ01791 Pending More Actions

University of Otago [P2P Up...] > BOC Gases New Zealand Limited

Blanket Requisition		Bill To	Ship To
Requisition Number	RQ01791	Order	Accounts Payable (AP)
Buyer	Simon Salmon	Originators	PO Box 56
State	Pending	Requisition Date	Dunedin
Organisation Unit	[SO] SS-Operations Edit	Approval Chain	9054
Valid From	9/01/2023 12:00 AM	Valid To	New Zealand
Alert Date	5/12/2023 12:00 PM	Alert Amount	uat-training@otago.ac.nz
Available To	Simon Salmon, Tara Tarakihī		
Attachments	Drop files to attach, or browse Size limit: 50MB		
Visibility	Organisation Unit Edit		
Email supplier on Approval	No		

Details Justification Approvals **Comments**

+ Add Comment