

Amend a Blanket Requisition or Order in Unimarket



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Introduction

This document describes when it is possible to amend a blanket requisition or purchase order and how to go about it.

This does not cover how to amend standard requisitions and blanket orders. For more information see 'Amend a Standard Requisition or Order in Unimarket'.

Requisition vs Order

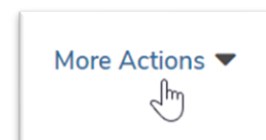
A requisition is what the end-user creates when they are requesting goods or services.

After the requisition has been through any required approvals, an order is created.

The order (or sometimes just the order number) is what gets sent to the supplier. When the supplier sends us an invoice they should quote the order number.

How to Edit a Requisition or Order

At all stages of a requisition and order, to make an edit go to the 'More Actions' drop-down menu. The menu options will change depending on your level of access and the stage of the requisition or order.



Amending an Incomplete Blanket Requisition

Note: Only users with the 'Create Blanket Order' role can create a blanket requisition in Unimarket. If you do not see the 'Create Blanket Order' option, you need to complete the 'Blanket Order Request Form' and send it to a Supply Chain hub to create the blanket requisition on your behalf.

Only the person named as the 'Buyer' can make edits. For blanket requisitions and orders, this will stay as the creator of the blanket order or it can be changed to someone with the 'Buyer' role. It cannot be set to another person with the 'Create Blanket Order' role.

While the requisition is being created by the requestor it's called an **incomplete requisition**.

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- While it has a status of incomplete, anything can be edited by the original requestor, including the supplier if it's a non-catalogue requisition.
- To save a requisition and come back to it later, click **Save**. At this point it will be given a requisition number and a status of Incomplete.
- To find a requisition that has been saved go to the Tasks menu in the top right-hand corner > Incomplete Requisitions. To continue to edit the requisition click **Complete**.
- Once it is ready to be submitted for approval, click 'Checkout'.

After clicking 'Checkout' the blanket requisition will have a status of 'Pending' as it goes through the approval process (if required).

Amending a Pending Blanket Requisition

When a blanket requisition is in a state of 'pending' (approval):

- An **approver** can:
 - Change 'Ship To'
 - Add attachments
 - Change account code
 - Change dates, including alert date
 - Add justification attachments or comments
 - Add comments
- The **buyer** named on the order can:
 - Change dates, including alert date
 - Add comments

Once the requisition has been fully approved an order will be created, and more changes can be made at that stage – see below.

Amending a Blanket Order

A blanket requisition becomes a blanket order once it is fully approved.

Any person with the 'Buyer' role can make the following edits:

- Edit access:
 - Add or remove names in 'Available To'
 - Enable or disable ['Release Order Coding'](#)
- Edit dates:
 - Update Valid From, Valid To, and Alert dates
- Change the Org Unit
- Add attachments

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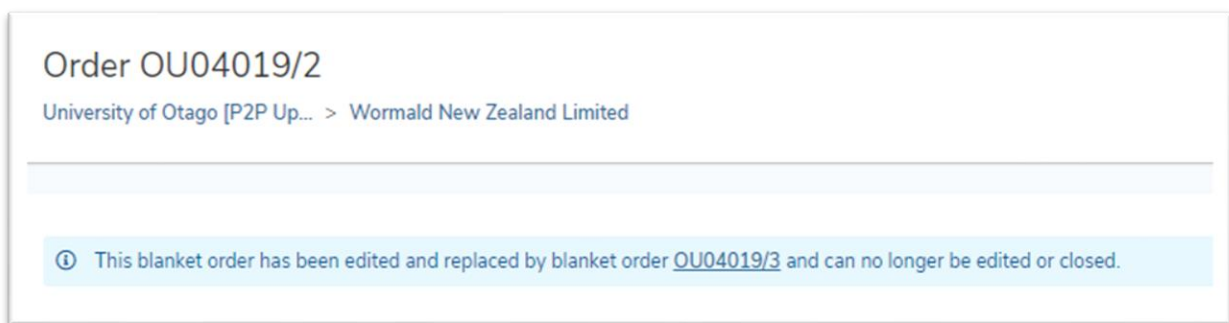
Only the person named as the 'Buyer' on the blanket order can make the following edits:

- Edit amount
 - Increase blanket amount
 - Decrease blanket amount
 - Edit account code (this can only be done whilst increasing or decreasing the blanket amount)

A browser in the 'Available To' can:

- Accept or reject invoices

Certain changes to a blanket order will generate a suffix to indicate it has been updated (e.g. /2, /3). Previous versions can no longer be used and will point to the latest version:



About Release Orders & Credit Notes

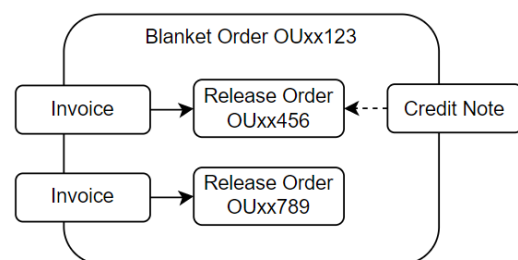
A release order is a purchase order created automatically by the system when an invoice is accepted. This sometimes gets confusing as there will be multiple "order numbers" associated with a blanket order.

The blanket order is the "bucket of approved funds" and when money needs to be taken from the bucket a "release order" needs to be created to enable that.

A user can create a "release order" and apply it to a blanket order but more often we simply accept or reject an invoice against a blanket and the release order is generated automatically.

Credit notes against blanket orders

To apply a credit note to a blanket order there must be a "release order" to apply it to. Credits can't be applied directly to blanket orders.



* Not actual order numbers - demonstration purposes only

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Release Order Coding

Blanket orders are assigned account code/s when they are created.

Without 'Release Order Coding' enabled, any invoices can **only** be applied to the account code applied to the blanket order. When users are asked to Accept or Reject an invoice this is what they see:

Invoice 952368 for Blanket Order OU02804

Order Number: OU02804
Order Description: Water Consumption
Order Details: Billed quarterly
Invoice Number: 952368
Invoice Comments: OU02804
Show lines with errors only:

Account Code
10-SF-C04-3181-00- - -
Order Tax: \$313.044 ▼

LINE	CODE	NAME	QUANTITY	UNIT PRICE
1		Subdivision Deposit	1	\$2,086.96 / Each

Account Code: 10-SF-C04-3181-00- - -
Order Tax: \$313.044 ▼

Total
Shipping
Shipping Order Tax

Reason:

Accept Reject Cancel

If 'Release Order Coding' is enabled, when an invoice arrives it will be sent to everyone in 'Available To' to be accepted or rejected, and at that time the person reviewing the invoice can also select a different account code for the invoice to be applied to:

Invoice 952368 for Blanket Order OU02804

Order Number: OU02804
Order Description: Water Consumption
Order Details: Billed quarterly
Invoice Number: 952368
Invoice Comments: OU02804
Show lines with errors only:

Account Code
Account: General Ledger ▼ — Entity: 10 — Cost Centre: TI — Activity Centre: C01 — Dissection: 2421 — Subdissection: 00 —

Order Tax: \$313.044 ▼

LINE	CODE	NAME	QUANTITY	UNIT PRICE
1		Subdivision Deposit	1	\$2,086.96 / Each

Account Code
Account: Archibus Lease ▼ — Lease Lookup — Leased Item — Cost Centre — Activity Centre — Cost Category — Dissection — Subdissection

Order Tax: \$313.044 ▼

Total
Shipping
Shipping Order Tax

Reason:

Accept Reject Cancel

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At this point the invoice can be coded to a different account code to the original blanket order.

- Release Order Coding (Off) = invoices will ONLY be coded to the blanket order default
- Release Order Coding (On) = invoices can be coded to a different account