# Requisition for Services or Blanket Orders A Requestor's Quick Guide

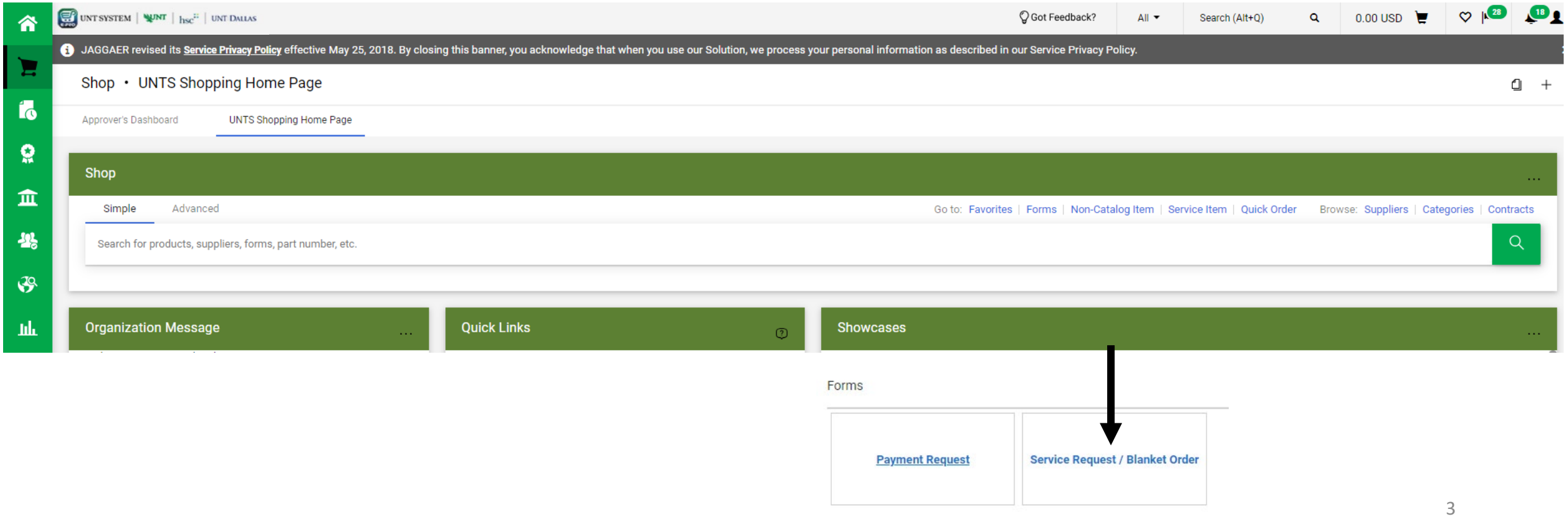
Shopping is Easy in ePro!

# Disclaimer:

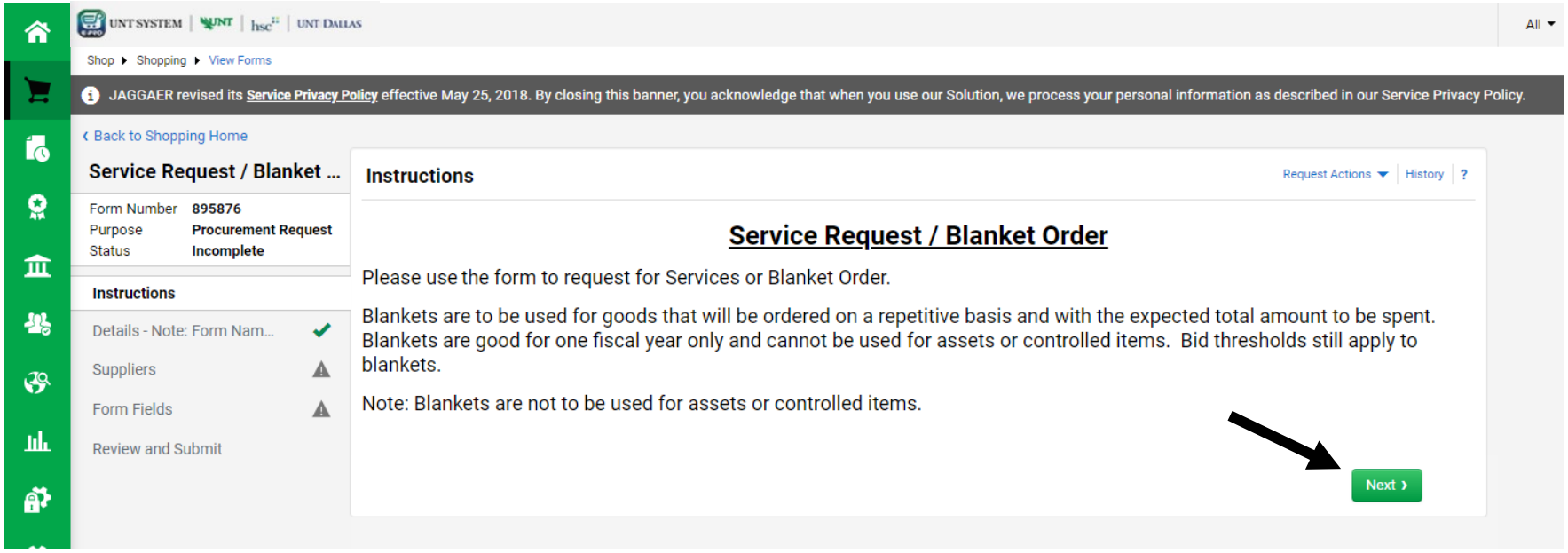
Blanket Orders are NOT to be used for assets or controlled items. All assets and controlled items MUST be ordered via Catalog or Non-Catalog requisitions.

# Creating a Service Request / Blanket Order

**From the Shopping Home Page, navigate to the Forms section under the Showcases menu. Click 'Service Request / Blanket Order' to begin.**

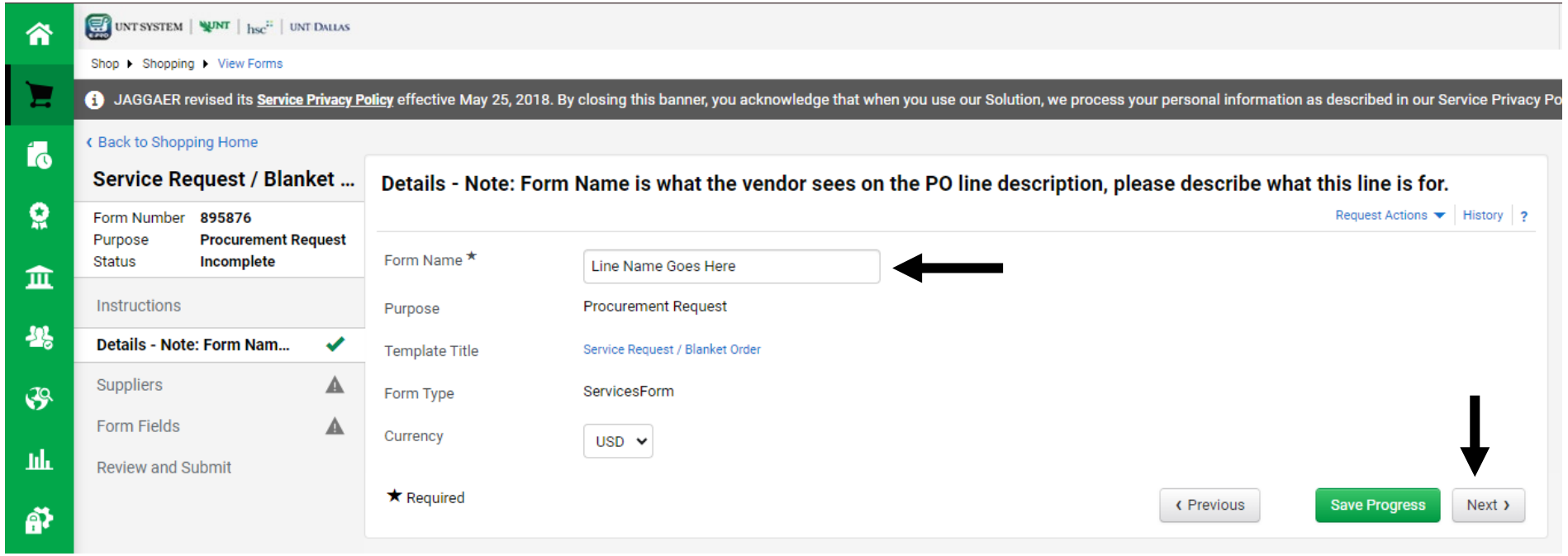


# Creating a Service Request / Blanket Order



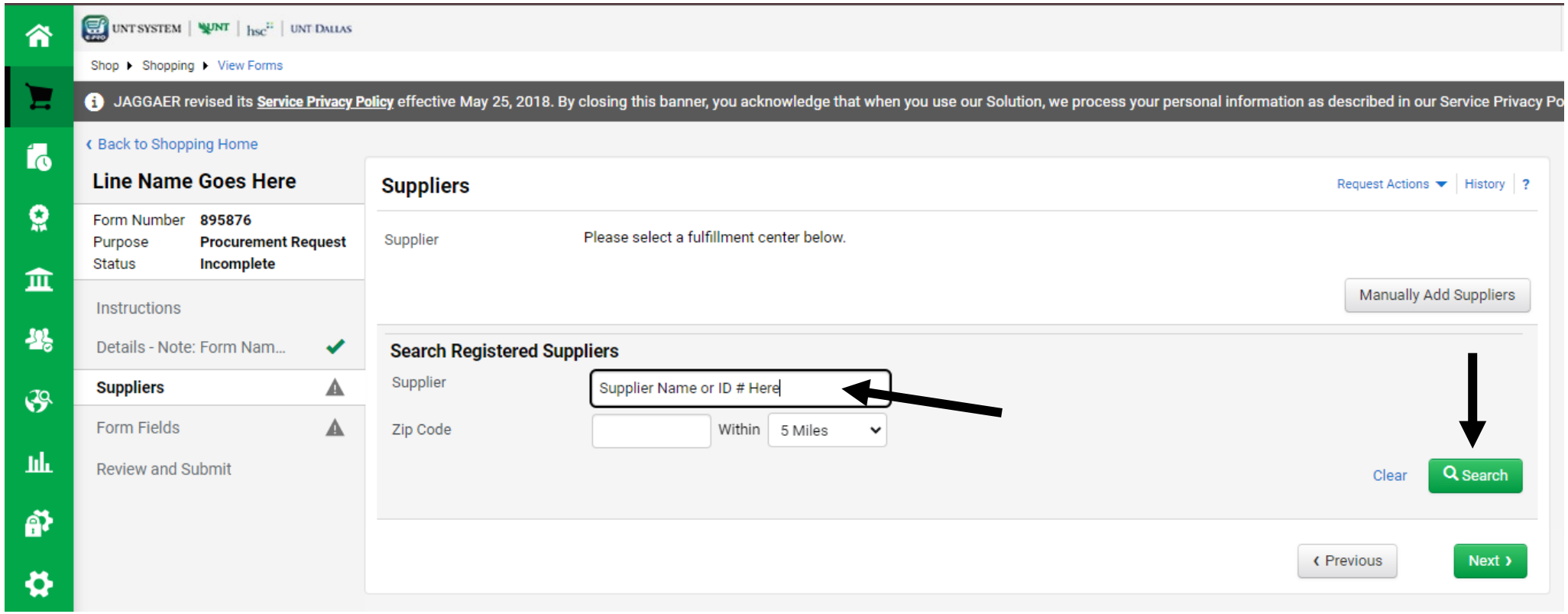

**The Instructions page is displayed. Take a moment to familiarize yourself and click 'Next' to proceed.**

# Creating a Service Request / Blanket Order



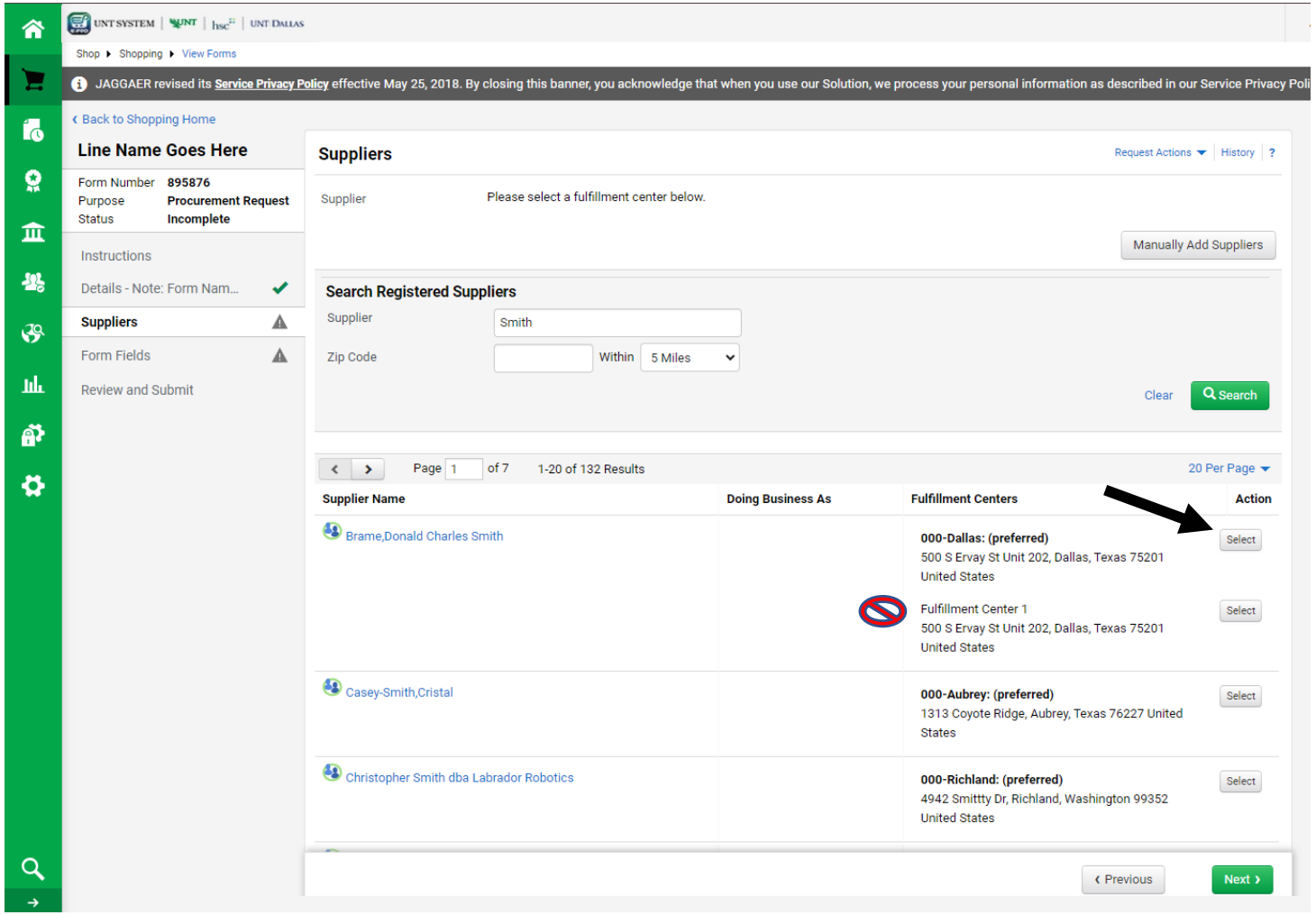

**The Details page is displayed. The Form Name will be the name of the corresponding line on the PO, so update it accordingly. Click 'Next'.**

# Creating a Service Request / Blanket Order



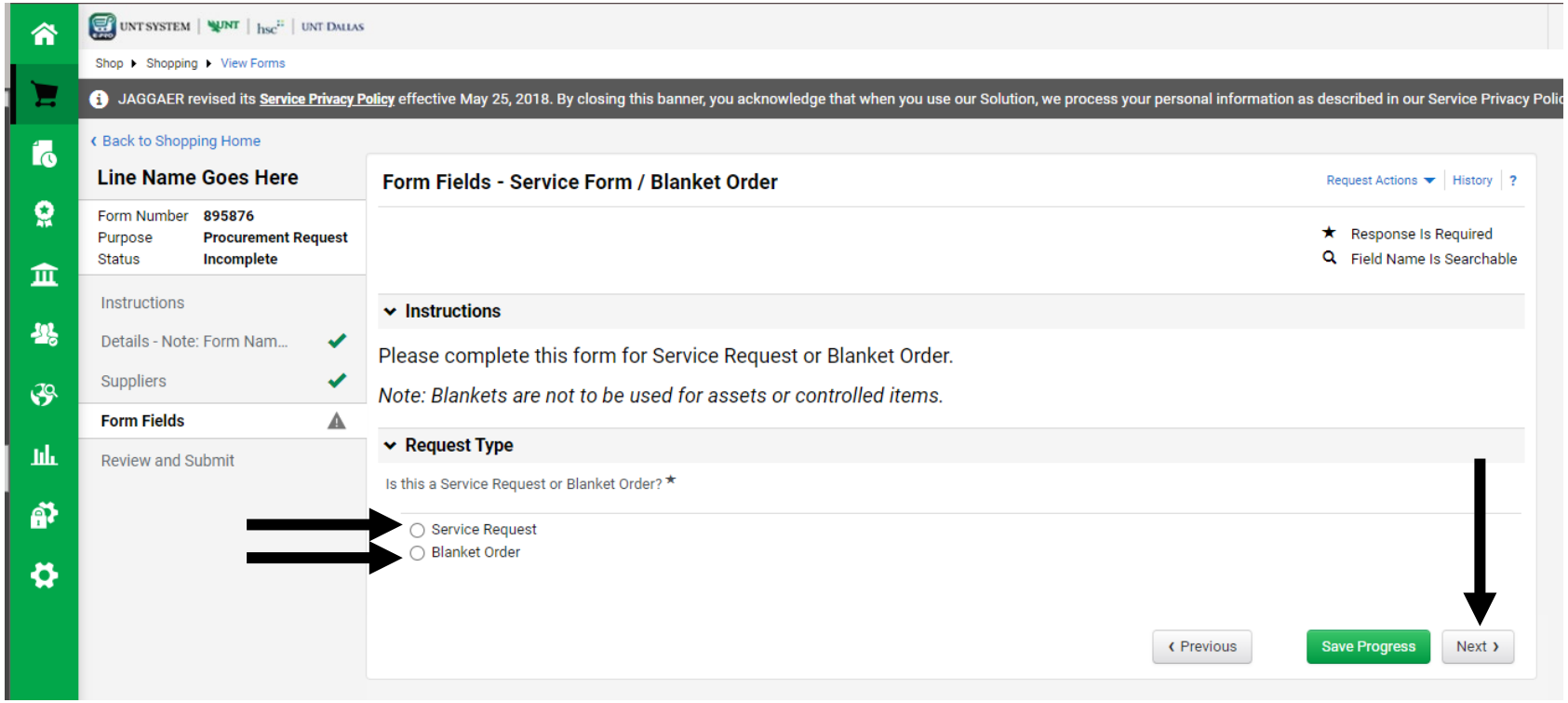

**Enter the supplier's name or ID number and click 'Search'.**

# Creating a Service Request / Blanket Order




**From the search results, click 'Select' for the intended supplier, then click 'Next'. Do not select the Fulfillment Center 1 option if available.**

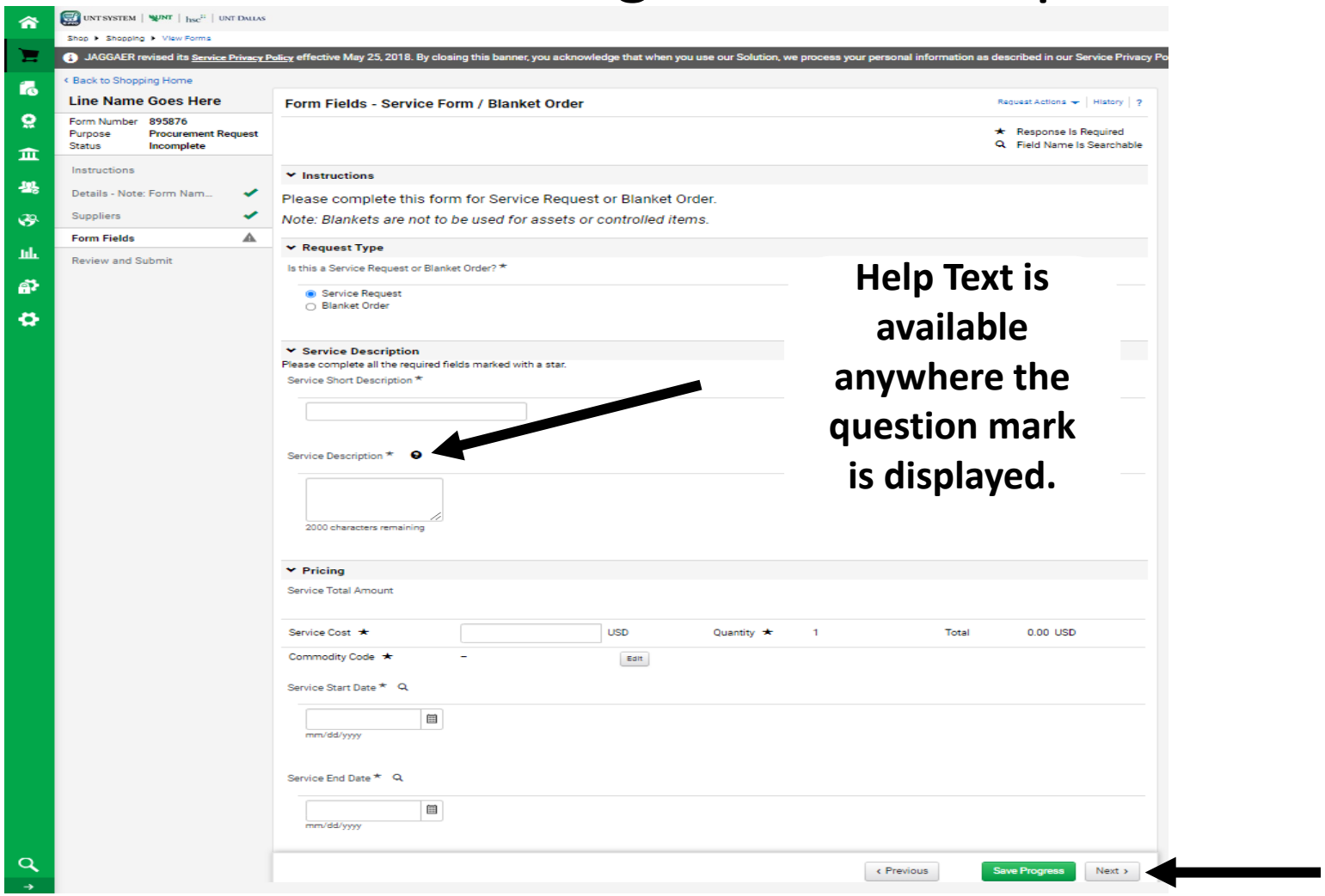
# Creating a Service Request / Blanket Order




**The Form Fields page is displayed. Select 'Service Request' or 'Blanket Order', then click 'Next'.**

**Reminder: Blanket Orders are NOT to be used for assets or controlled items. All assets and controlled items MUST be ordered via Catalog or Non-Catalog requisitions.**

# Creating a Service Request

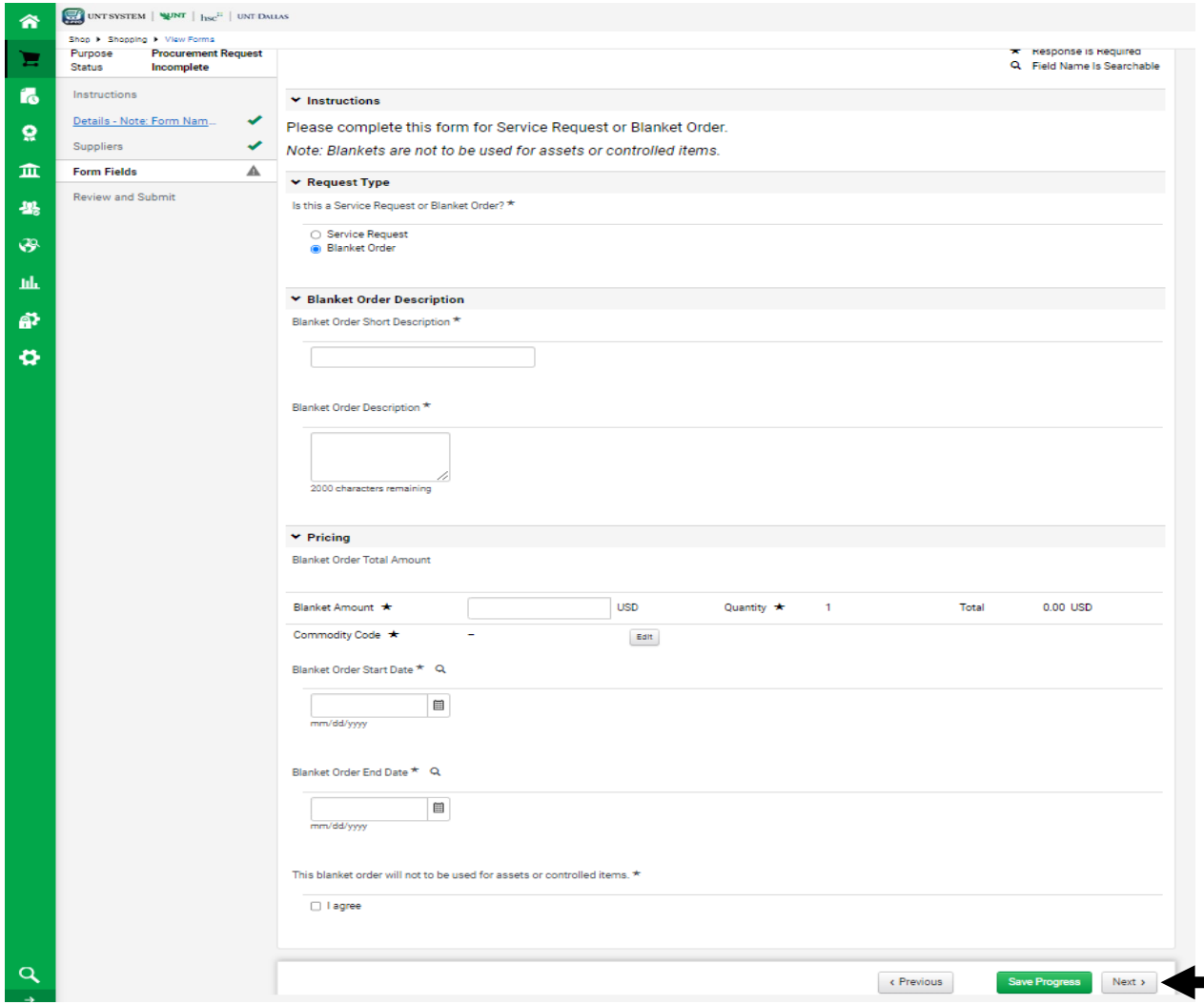



**Help Text is available anywhere the question mark is displayed.**

**The rest of the Form Fields page is displayed. Enter the necessary information and select the appropriate Commodity Code. Click 'Next'.**

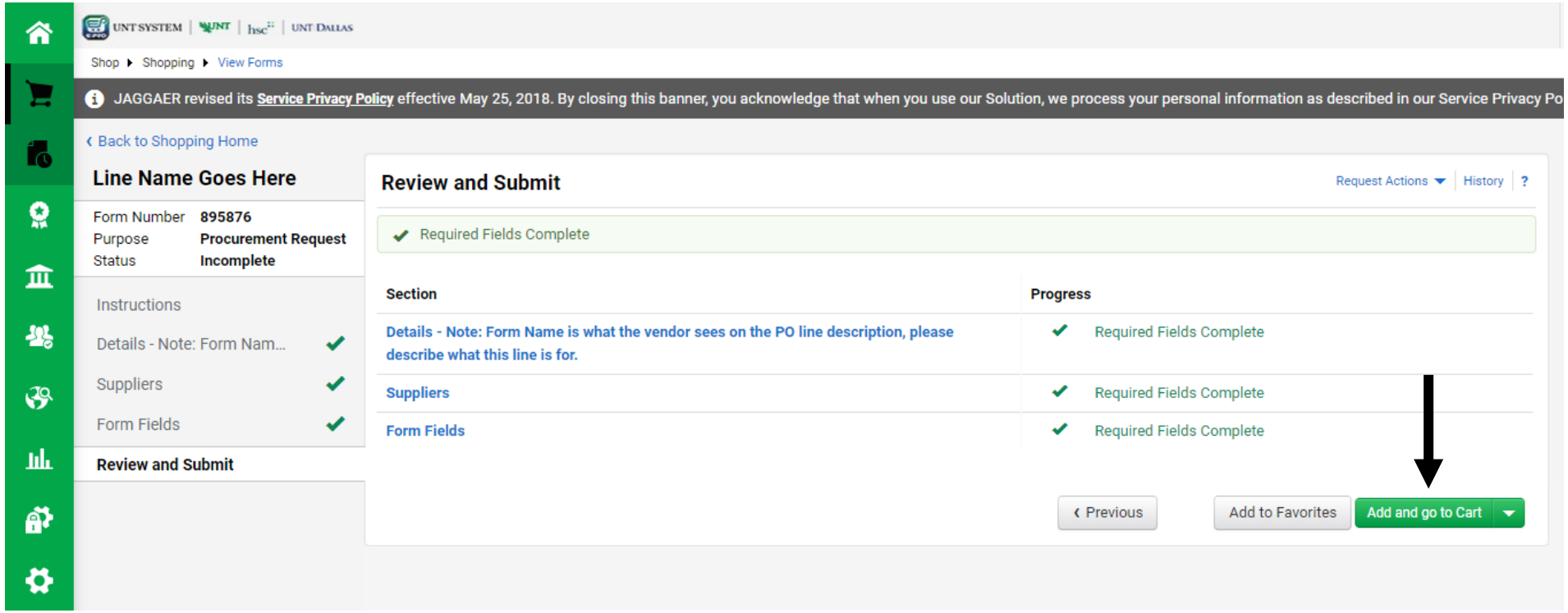
**For Blanket Orders, see the next slide.**

# Creating a Blanket Order




**The rest of the Form Fields page is displayed. Enter the necessary information, select the appropriate Commodity Code, and select 'I agree' to confirm that you will not use the Blanket Order for assets or controlled items. Click 'Next'.**

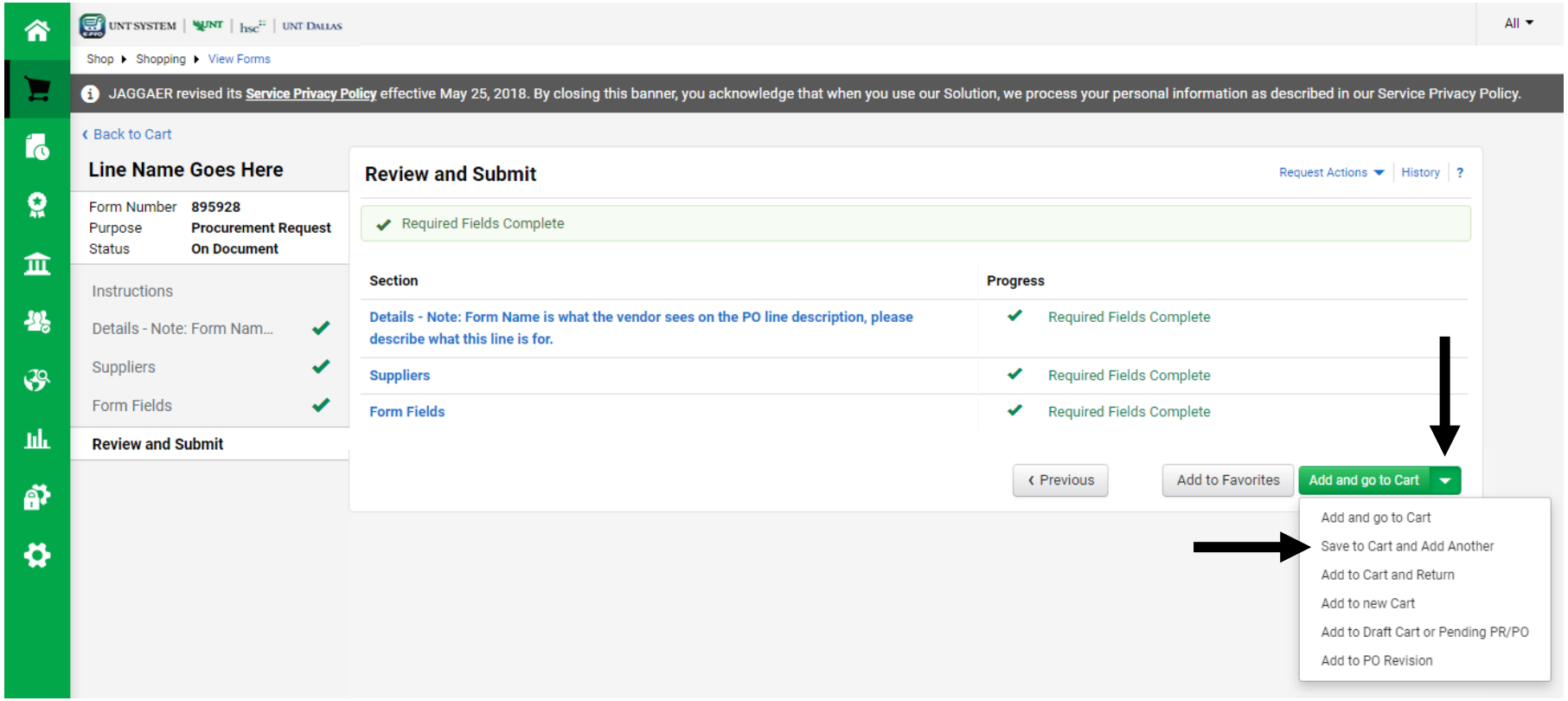
# Creating a Service Request / Blanket Order




**If all pages are complete, and no more lines are needed, click 'Add and go to Cart'.**

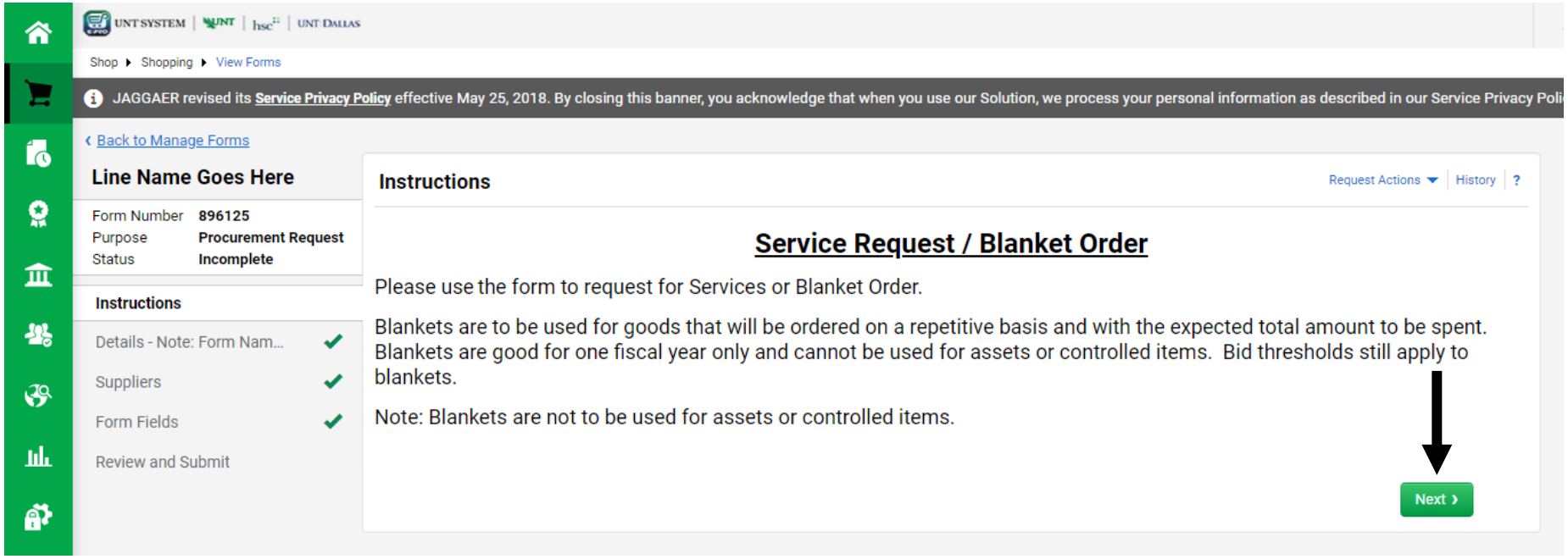
**If additional lines are needed, proceed to the next page. Otherwise, skip to slide 18.**

# Creating a Service Request / Blanket Order



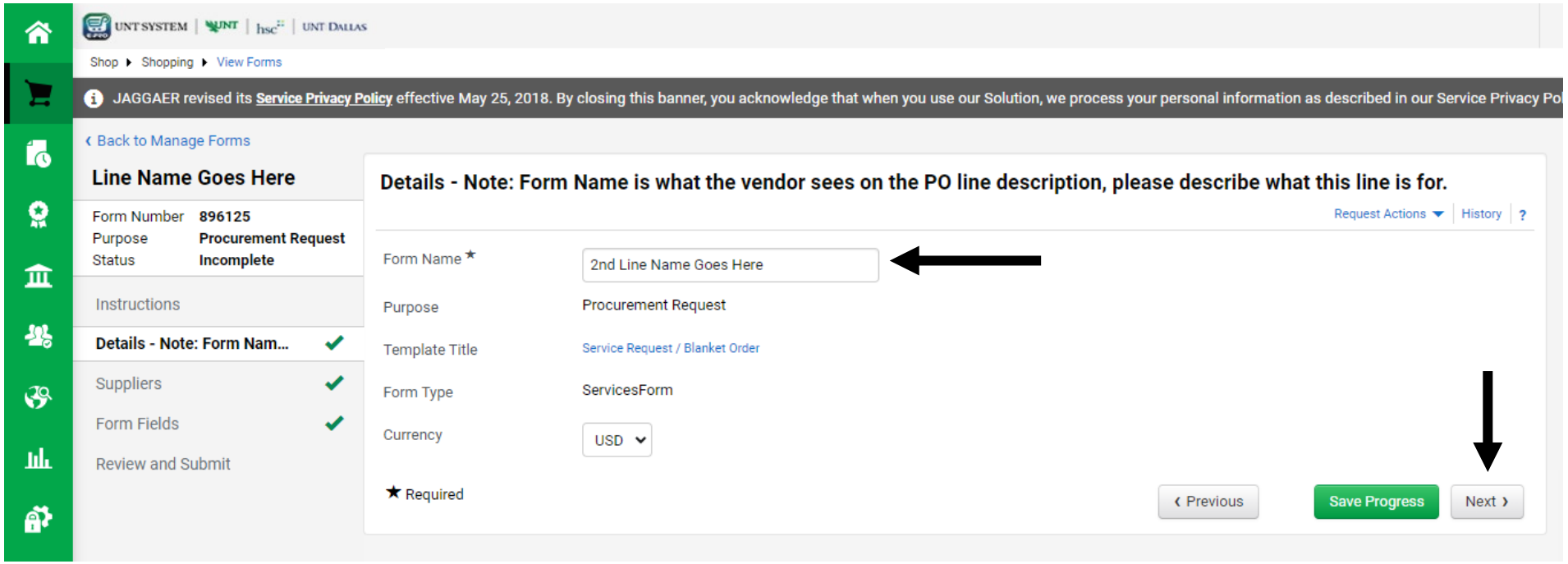

**To add an additional line, click the downward arrow, then click 'Save to Cart and Add Another'.**

# Creating a Service Request / Blanket Order




**The Instructions page appears again. Click 'Next'.**

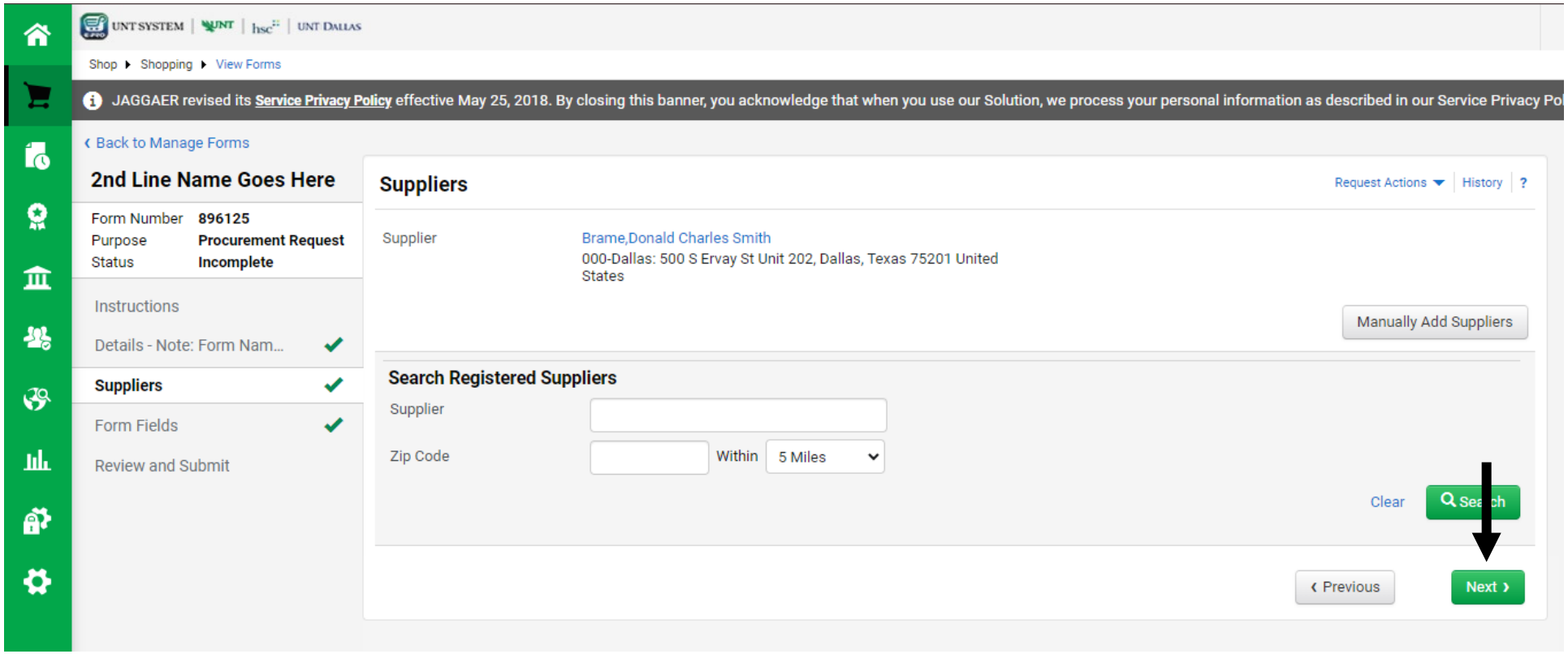
# Creating a Service Request / Blanket Order




**The Details page appears again. The Form Name will be the name of the corresponding line on the PO, so update it accordingly. Click 'Next'.**

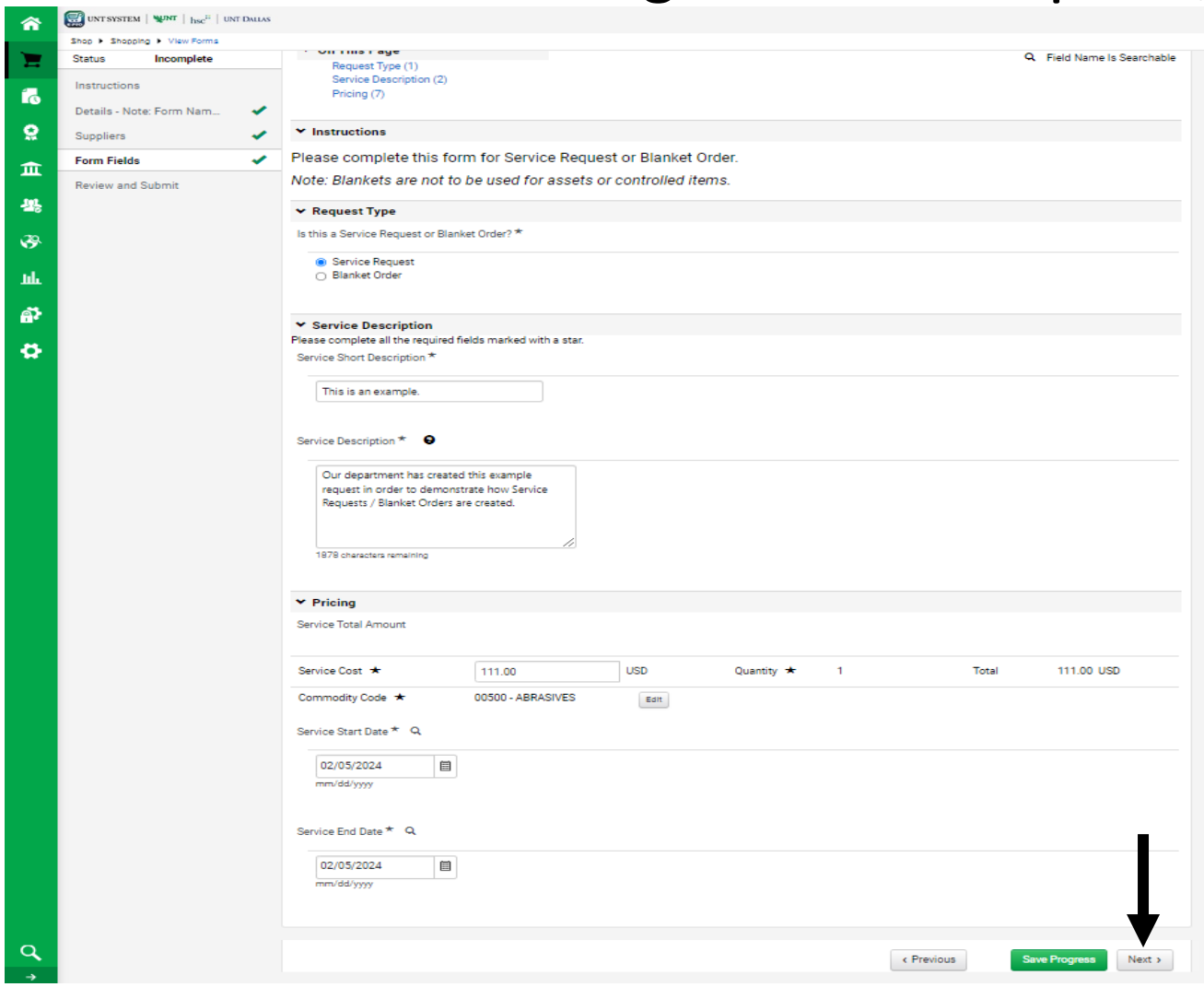
**NOTE: This form/line name MUST be distinct from all other line names for this order.**

# Creating a Service Request / Blanket Order




**The Suppliers page appears again. You can not submit requisitions for multiple suppliers at once, so click 'Next'.**

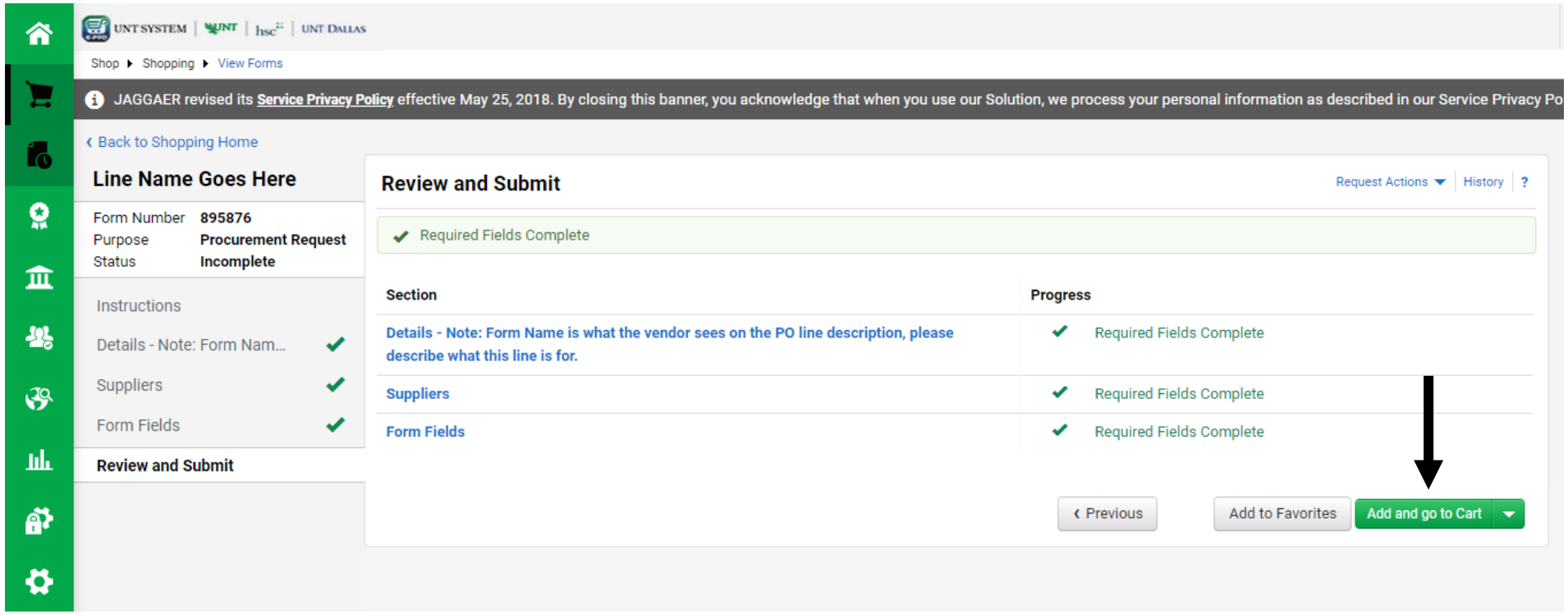
# Creating a Service Request / Blanket Order




**The Form Fields page appears again. Notice that all the information input for the first line appears here as well. None of these sections are required to be unique, but you may change them as needed. When all fields reflect the intended information for the additional line, click 'Next'.**

**NOTE: Different form types can not be mixed on a single requisition. Do not attempt to change the second line to a Blanket Order or Vice Versa.**

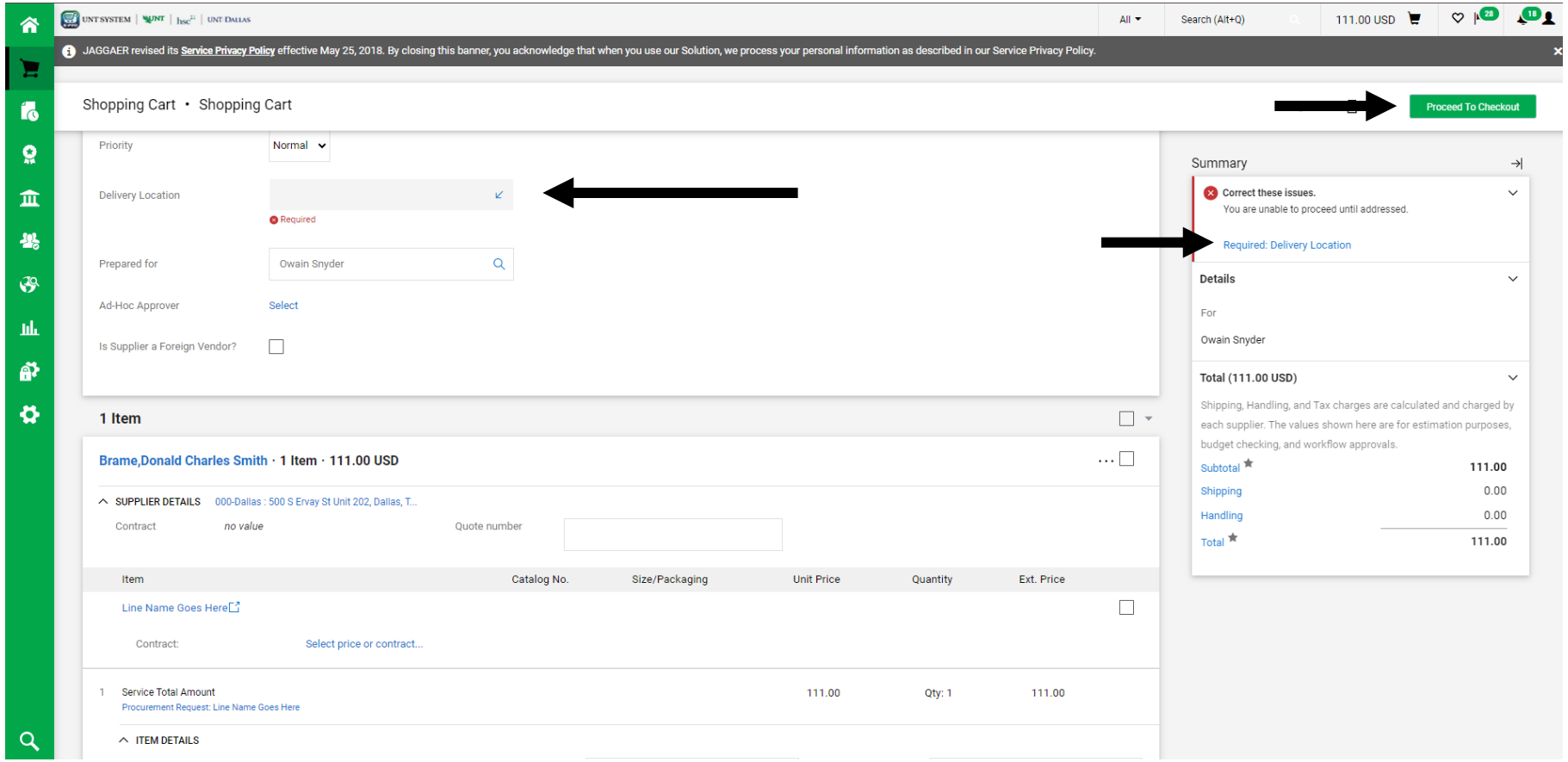
# Creating a Service Request / Blanket Order




**If all pages are complete, and no more lines are needed, click 'Add and go to Cart'.**

**If additional lines are needed, repeat from slide 12.**

# Creating a Service Request / Blanket Order

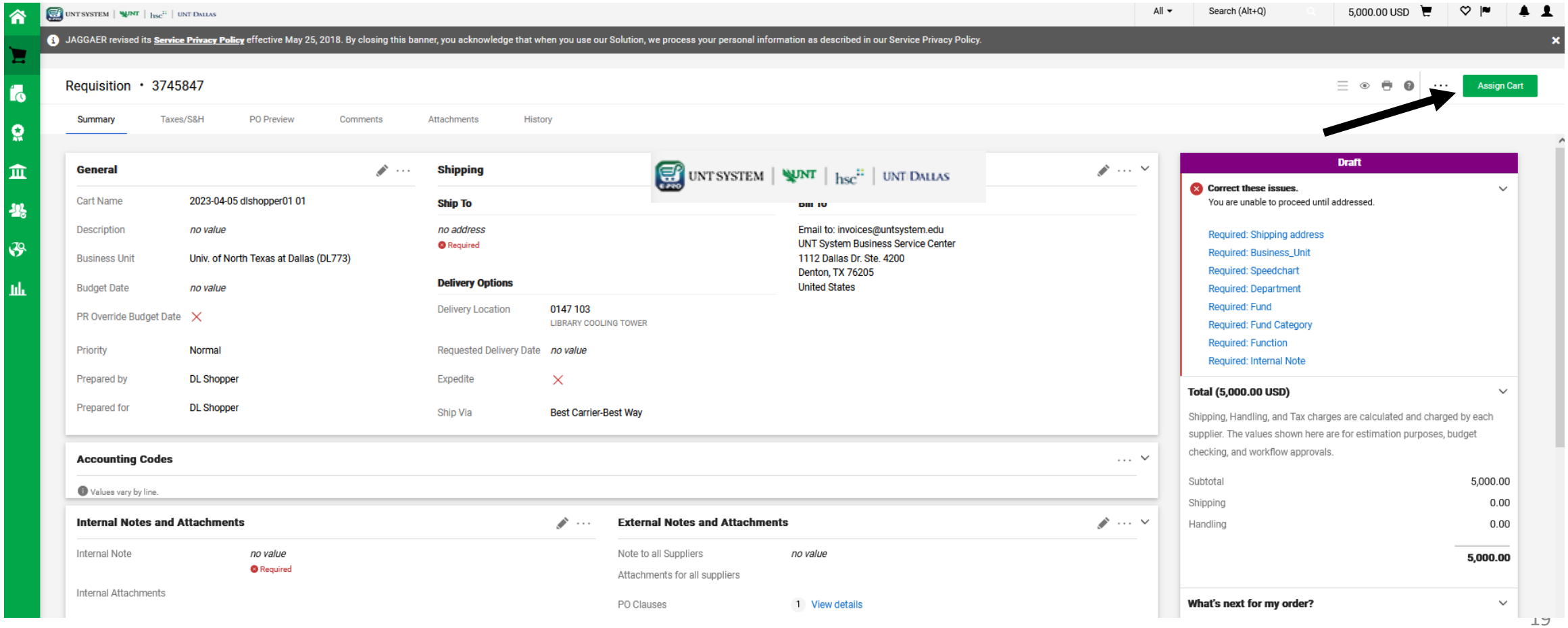



**The form is now a line item in your active cart. Address any issues before clicking 'Proceed to Checkout'.**

**NOTE: If you've gotten to this step and additional lines are still needed, click the Home Icon and repeat from slide 3. This is NOT starting over- it will add the resulting 2nd line to your active cart.**

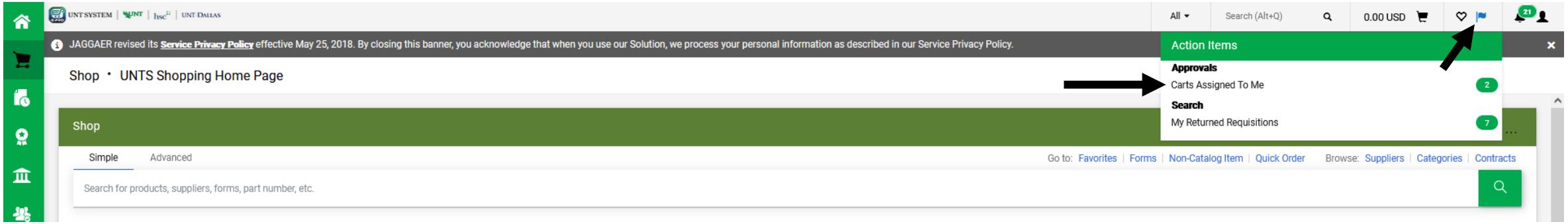
# Creating a Service Request / Blanket Order

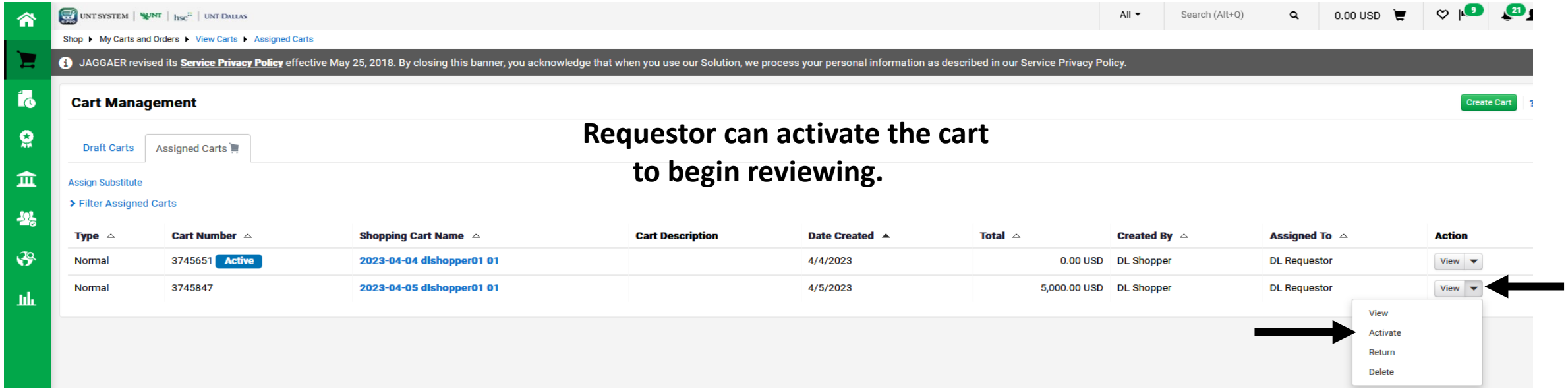
**Users with the Shopper role will click Assign Cart to route the form to an individual with the Requestor role. The Requestor will review and place the order. NOTE: Approvers' names MUST NOT appear in the 'Prepared by' or 'Prepared for' fields.**



# Creating a Service Request / Blanket Order

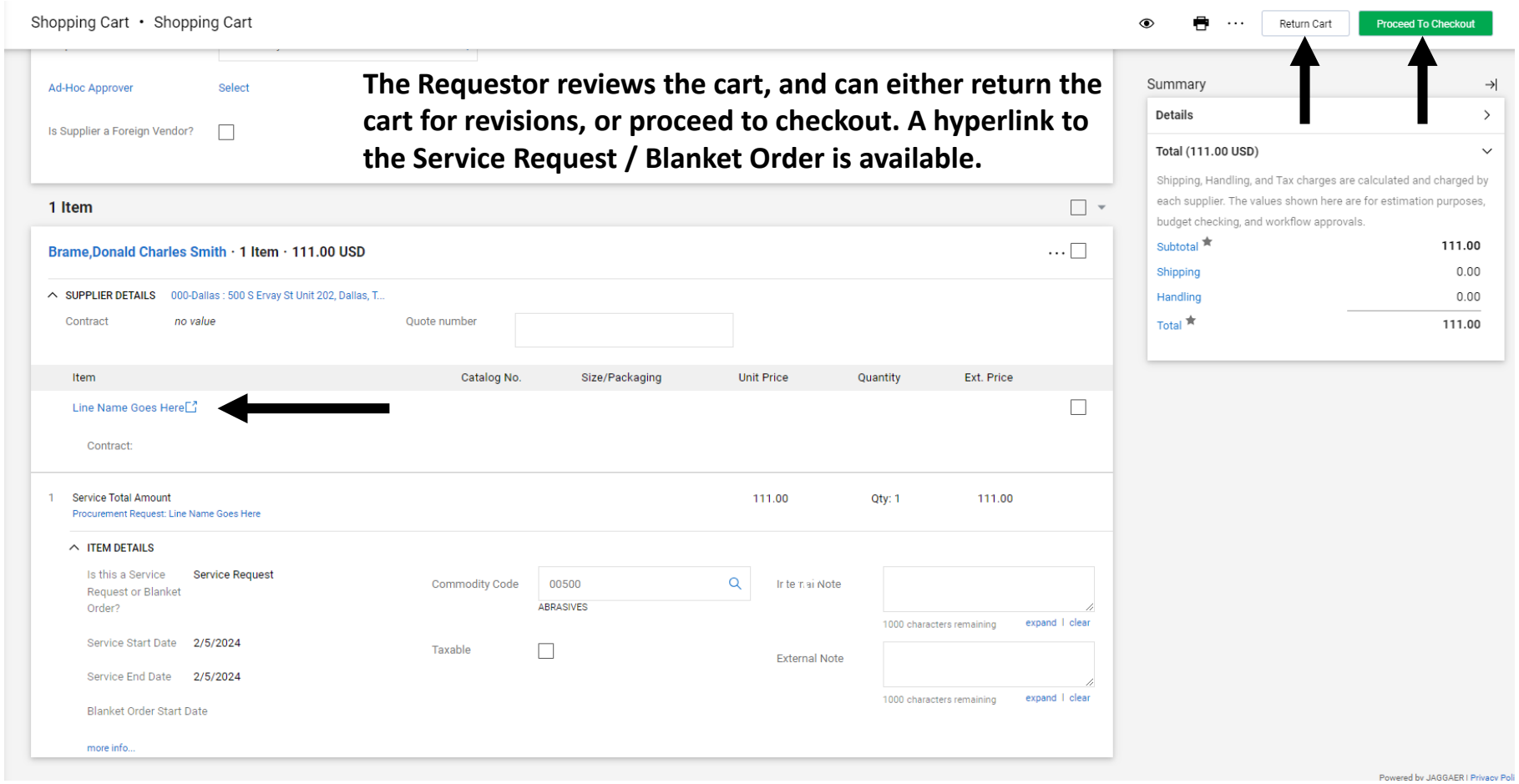
**The Requestor logs in to view the Cart. Click the flag icon and the 'Carts Assigned to Me' link.**




**Requestor can activate the cart to begin reviewing.**

# Creating a Service Request / Blanket Order




**The Requestor reviews the cart, and can either return the cart for revisions, or proceed to checkout. A hyperlink to the Service Request / Blanket Order is available.**

# Creating a Service Request / Blanket Order

Requisition • 3745847

Assign Cart | Place Order

Summary | Taxes/S&H | PO Preview | Comments | Attachments | History

**General**

| | |
|---|---|
| Cart Name | 2023-04-05 dlshopper01 01 |
| Description | *no value* |
| Business Unit | Univ. of North Texas at Dallas (DL773) |
| Budget Date | *no value* |
| PR Override Budget Date | ✕ |
| Priority | Normal |
| Prepared by | DL Requestor |
| Prepared for | DL Shopper |
| Ad-Hoc Approver | Select |

**Shipping**

**Ship To**

*no address*

Required

**Delivery Options**

| | |
|---|---|
| Delivery Location | 0147 103<br>LIBRARY COOLING TOWER |
| Requested Delivery Date | *no value* |
| Expedite | ✕ |
| Ship Via | Best Carrier-Best Way |

**Billing**

**Bill To**

Email to: invoices@untsystem.edu
UNT System Business Service Center
1112 Dallas Dr. Ste. 4200
Denton, TX 76205
United States

**Draft**

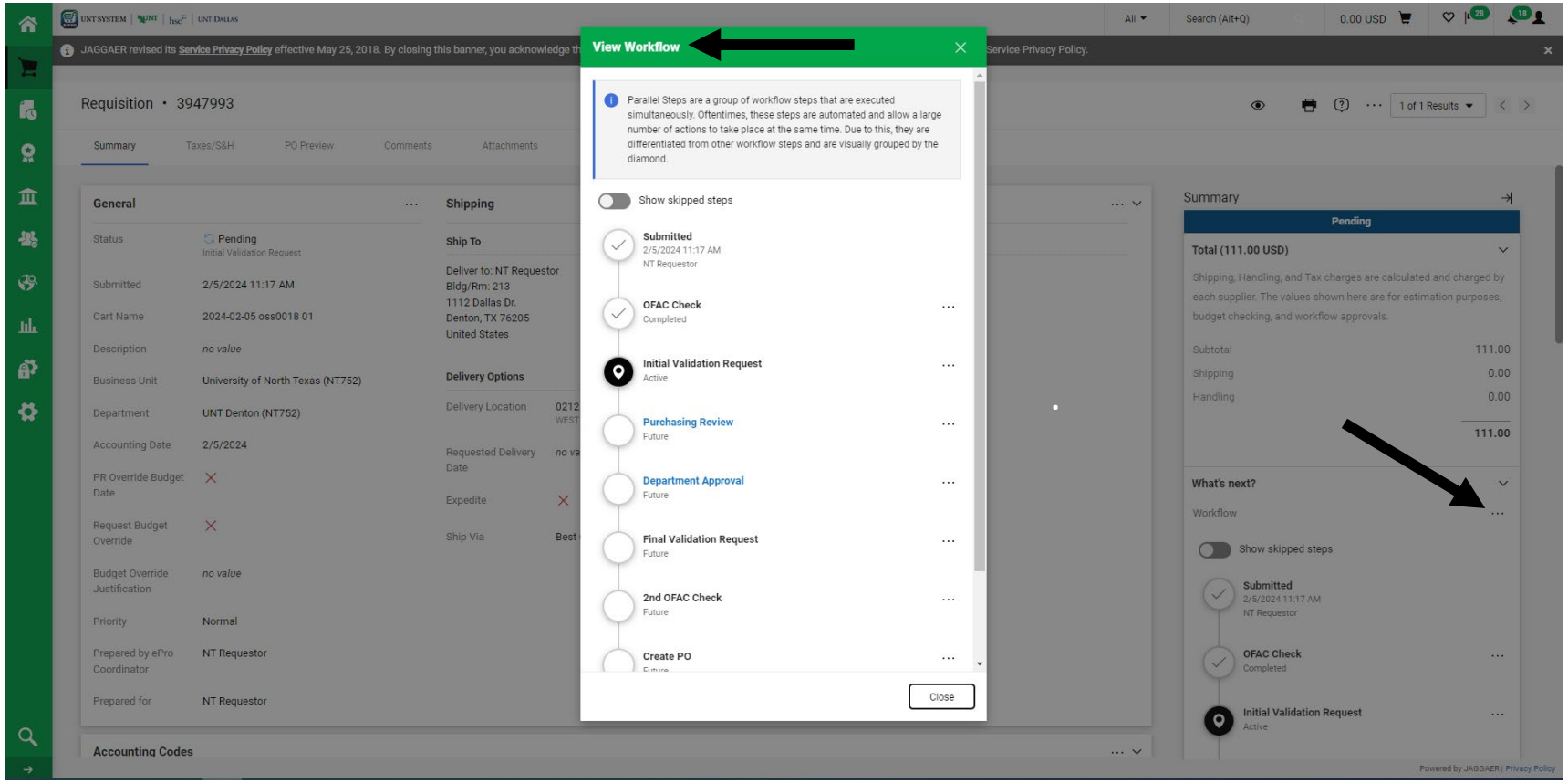
**Correct these issues.**
You are unable to proceed until addressed.

- Required: Shipping address
- Required: Business_Unit
- Required: Speedchart
- Required: Department
- Required: Fund
- Required: Fund Category
- Required: Function
- Required: Internal Note

**Total (5,000.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

**Before the order can be placed, all required fields must be completed. Each section can be edited with the corresponding pencil icon.**

# Creating a Service Request / Blanket Order

**When the Requestor places the order, the workflow status can be viewed in the 'What's Next' section of the requisition. Once it moves all the way through the workflow, a Purchase Order will be issued. Click the box with the arrow to view the workflow steps.**