STANDARD PROCEDURE

DESCRIPTION

Title: Master Blanket Purchase Order (Contract) Input/Set Up   **Effective:** October 1, 2011

No. SP0 27   **Revision:** 0

Standard Procedure for the input and set up of Contracts or Master Blanket Purchase Orders in ProcureAZ

STANDARD PROCEDURE

1.   Master Blanket Purchase Orders (MBPO)

1.1.   Master Blanket Purchase Orders (Contract) allows users to communicate any agreement with a Vendor to provide goods and services. Master Blanket Purchase Orders do not require shipping, billing or accounting information as they do not represent an order for goods or services and therefore do not encumber funds.

2.   MBPO's are created and or input based on the following methods;

2.1.   MBPO as a result of a solicitation, are converted by approving an Open Market Requisition into a MBPO and changing the PO type to "Blanket",

2.2.   Cloning an existing MBPO,

2.2.   Input from scratch or new, and

2.3.   Conducting a solicitation and award the items on your Bid document. Once awardrecommendation is approved you are able to "Create a PO" from the Summary Tab.

See: ProcureAZ Quick Reference Guide – Solicitation Parts I and II

ProcureAZ Quick Reference Guide – Contracts Training

3.   Basics of Contract Set-Up Process

3.1.   Regardless of creation method, in all cases, determinations should be made as to what is being contracted for, and type of Contract as stated in A.R.S.41-2544;

   3.1.1.   Home Tab, select Document/PO/New,

   3.1.2.   Screen appears offering selections for MBPO input,

      3.1.2.1   Create from "scratch",

      3.1.2.2   Clone from other Purchase Order, and

      3.1.2.3   Create from Requisition;

   3.1.3.   If input from scratch, document must be coded as Blanket

3.2.   General Tab requires input of all (*) fields to generate MBPO number, including Description, Department Location.

3.3.   Other fields of import that should be changed and or chosen;

   3.3.1.   Receipt Method (Quantity or Dollars). Quantity should be chosen, unless approval has been received for a cost reimbursement contract, where Dollars spent is the receiving method for payment,

   3.3.2.   PO Type, should always be Blanket,

   3.3.3.   Type Code; designation of type of MBPO, statewide, agency specific etc.

   3.3.4.   Release Type of Direct Release or Standard Release; depending on Type Code chosen will drive this selection, and

   3.3.5.   Any other fields that are particular to the MBPO.

3.4.   Item Tab requires the following input;

   3.4.1.   Utilization of item description,

   3.4.2.   Quantity,

   3.4.3.   Unit Cost,

   3.4.4.   Unit of measure as applicable,

   3.4.5.   Commodity Codes, or

   3.4.6.   Item information is copied over from original solicitation or other MBPO.

   3.4.7.   An alternate approach for the input of Items is to enter the items as you would any other document. However, when it comes to entering the quantity and unit cost, leave them both at 0. That data will be entered on the release against the blanket.

3.5.   Vendor Tab requires the following input;

   3.5.1.   If converted from a solicitation, the Vendor awarded the solicitation will be transferred over,

3.5.2.   Click on Look up and Add Vendor,

  3.5.2.1.   Input Vendor Name or other identifying information in appropriate field and click "Find It",

  3.5.2.2.   Of the names provided click "radio" button to select the contracted Vendor

  3.5.2.3.   Apply Vendor Terms and Save.

3.6.   Routing Tab

  3.6.1   Does not require any entry.

3.7.   Control Tab

  3.7.1.   Complete all fields with an asterisk (*) including primary contract user information.

3.8.   Attachments Tab

  3.8.1.   Click "add attachment". Attachments should be the following:

  3.8.1.1.   Original Solicitation and any amendments,

  3.8.1.2.   Proposer/Bidder Response, and

  3.8.1.3.   Any other attachments that represent the Contract

3.9.   Notes, Change Orders and Reminders Tabs

  3.9.1.   Notes are messages for the record or file, input is allowed but not mandatory,

  3.9.2.   Change Orders, are applicable for any contract administration duties,

  3.9.2.   Reminders are set as a calendar option to notify the Contract Officer, or the Customer, of any event, such as contract expiration date, insurance due date, etc. Input is allowed but not mandatory.

3.10.   Summary Tab

  3.10.1. No input required. Opportunity to review all input prior to Approval

  3.10.2 Click "Submit for Approval,

  3.10.3 Document will be routed as per Approval path.

  See: ProcureAZ Quick Reference Guide – Contracts Training

4.   Modified PO or Change Order (if needed). Resulting PO can be changed via the change order process or cancelled.

5.   Effective

This Technical Bulletin is hereby authorized and effective
this 1st day of October, 2011, unless otherwise revised or repealed.

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