



Highlander eMerchant

Highlander eMerchant User Manual

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Browsers & Buyer

Overview:

The majority of users will be assigned the role of Buyer or Browser in Highlander eMerchant. User access is based upon the fund and organization security identified in Banner. To gain access, fill out the Highlander eMerchant Access Request Form located in the link below.

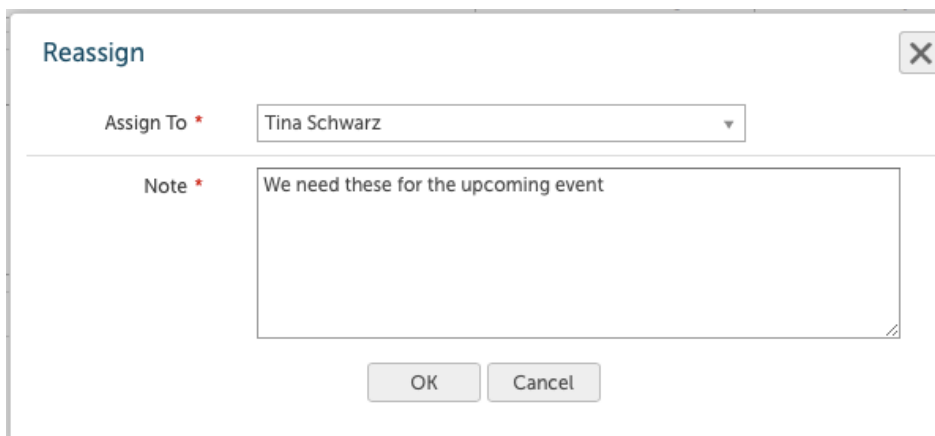
<http://www.njit.edu/finance/forms-fsi/>

Browser: This role allows users to search for items, add them to cart and then reassign requisitions to a Buyer as an Incomplete Requisition for final checkout, which will then route for approval. A Browser has the ability to specify what items they want to purchase but they cannot complete the purchase themselves

Buyer: This role gives users all the abilities of the Browser, but also the power to complete a requisition to begin the approval process. A Buyer should be a user with knowledge of account information. Link to Fiduciary Responsibility Policy: <https://www.njit.edu/policies/sites/policies/files/NJIT-Fiduciary-Responsibility-Policy.pdf>

Reassigning an Incomplete Requisition (Browsers)

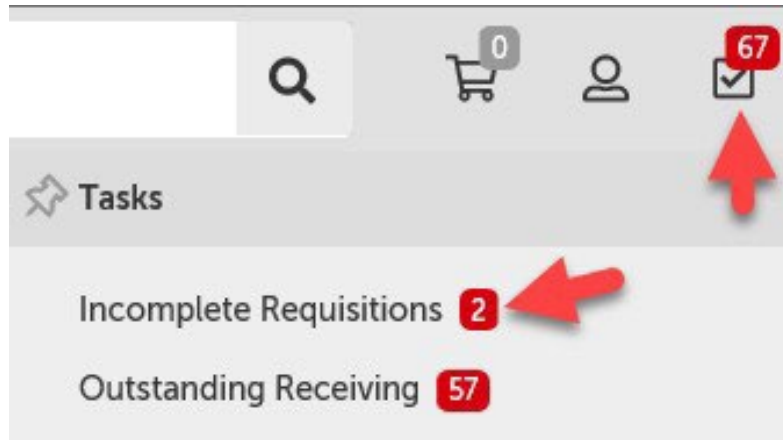
Browsers can find products and services in catalogs and create non-catalog order items in the same way as buyers. Once the shopping cart is full of the required items, browsers reassign the incomplete requisition from inside the checkout page. The checkout page allows the browser to specify details about the order (as much as they know) and provide instructions to the buyer. They select a community buyer from the list and click Reassign. The incomplete requisition is routed to the buyer for action and they will be notified by email and in their Tasks menu.



The image shows a 'Reassign' dialog box with a title bar containing the word 'Reassign' and a close button (X). Inside the dialog, there is a label 'Assign To *' followed by a dropdown menu showing 'Tina Schwarz'. Below this is a label 'Note *' followed by a text area containing the text 'We need these for the upcoming event'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Creating an Order from an Incomplete Requisition (Buyers)

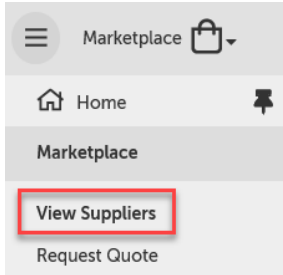
Buyers will be notified of new incomplete requisitions via email. These can be viewed from the menu Tasks > Incomplete Requisitions.



A list of pending incomplete requisitions are displayed and the detail can be viewed by clicking on the requisition number. From within the incomplete requisition the buyer can Checkout and complete the requisition using the standard purchasing process. Once the requisition is approved and an order is created the browser will be notified. If the buyer is not happy with the incomplete requisition, they can also choose to delete the request by selecting Cancel from the Actions menu in the top right.

Purchasing from a Roundtrip / Punch-Out Catalog

- Search for and select the desired supplier from the **'View Suppliers'** tab under Marketplace or the **'Supplier'** tab on the Dashboard page, like you would for any supplier.



Then/Or:



Supplier

☐ Favorite Suppliers

Search

- **Explanation**** There are two types of Catalog Suppliers – Roundtrip/Punch-out Catalogs and Hosted Catalogs. The difference between the two is Hosted Catalogs are 'hosted' within the eMerchant site, while Roundtrip/Punch-out Catalogs will take you out of Highlander eMerchant (opens a new window in your browser) and into that company's e-commerce website (Note: you must access these ecommerce sites through Highlander eMerchant. Never go directly into the company's website). You then search for the products you'd like, add them to your cart and then checkout. When you Checkout the system will bring you back into Highlander eMerchant, specifically the Shopping Cart page, where you can click 'Checkout' again to create your requisition.
- One easy way to look up all Catalog Suppliers is to check the box 'Catalog Suppliers Only' on the Suppliers dashboard page.

Dashboard **Suppliers** Transactions Procurement Performance

Supplier Tags Category

☐ Favorite Suppliers

Search

☐ Catalog Suppliers Only

- There's no visual distinction between the two types of Catalog suppliers until you click into them individually. When you click into the supplier, a Roundtrip/Punch-out Catalog is notated by the circular arrow symbol to the left of the name, and a Hosted Catalog is notated by a folder symbol to the left of the name – see screenshots below.
- Roundtrip/Punch-Out symbol is circular arrow below:



CDW-G

NJIT > CDW-G

E&I CONTRACT

QUICK ORDER

Store

Details

Contact

Tax Profile



CDW for NJIT

Hosted symbol is folder icon below:



CMF Business Supplies, Inc.

NJIT > CMF Business Supplies, Inc.

SBE VBE

Store

Details

Contact

Tax Profile



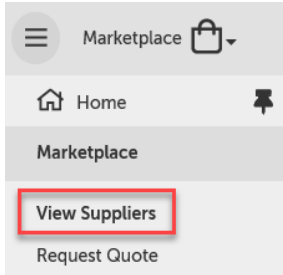
CMF Catalog (8943)

CMF NJIT Catalog

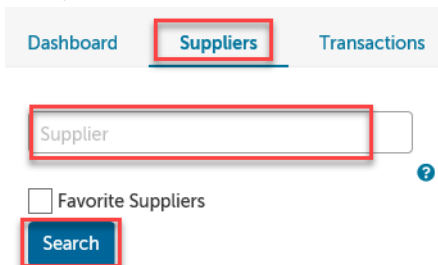
- (Note: If you don't see either symbol or a link for 'ABC for NJIT' or 'ABC Catalog' next to it that means the supplier you clicked into doesn't have a Catalog, and any orders entered with that supplier must be done as a Non-Catalog Item – see 'Creating a Non- Catalog Item' instructions).
- To begin a Rountrip/Punch-out catalog purchase click on the circular arrow or the 'ABC for NJIT' link next to it. This action will take you out of Highlander eMerchant and into the supplier's e-commerce website in a new window. Each e-commerce site will look different and may operate differently because they are maintained by the supplier.
- Some e-commerce sites may ask you to create an account the first time you go to their site (Ex. Amazon, Grainger). Once in the e-commerce site you can search for the products you'd like and add them your cart. Many suppliers will have a 'Quote' field so if you received a quote ahead of time you can type in the quote and the items in the quote will come up (Ex. CDW, Dell). Many will ask you to input your zip code and choose a delivery method before you can Checkout. (**No e-commerce site should ever ask you to input a full Shipping Address (zip code is okay) or Payment Information. If either are asked for please notify NJIT's Office of Procurement Services right away**)
- Once you have added all the items you want to your shopping cart, you then will click the 'Checkout' button, which will take you out of the supplier's site and back into the Highlander eMerchant platform where you will see the items you selected displayed within your '**Shopping Cart**'
- Within the '**Shopping Cart**', review the items and then click '**Checkout**' to start the creation of your requisition
- See '**Checkout Process**' instructions to complete the requisition.

Purchasing from a Hosted Catalog

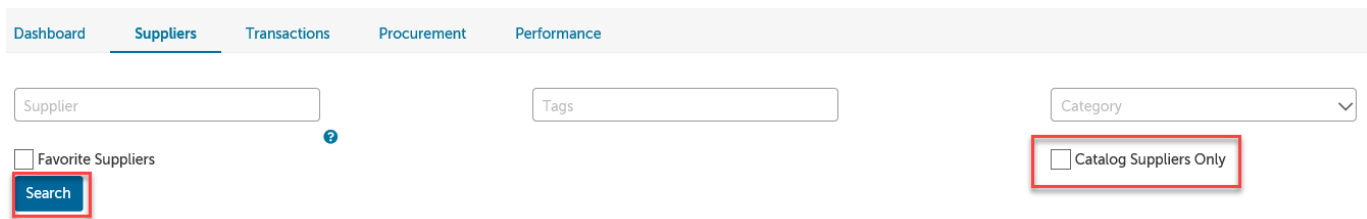
- Search for and select the desired supplier from the **'View Suppliers'** tab under Marketplace or the **'Supplier'** tab on the Dashboard page, like you would for any supplier.



Then/Or:




- **Explanation**** There are two types of Catalog Suppliers – Roundtrip/Punch-out Catalogs and Hosted Catalogs. The difference between the two is Hosted Catalogs are 'hosted' within the eMerchant site, while Roundtrip/Punch-out Catalogs will take you out of Highlander eMerchant (opens a new window in your browser) and into that company's e-commerce website (Note: you must access these ecommerce sites through Highlander eMerchant. Never go directly into the company's website). You then search for the products you'd like, add them to your cart and then checkout. When you Checkout the system will bring you back into Highlander eMerchant, specifically the Shopping Cart page, where you can click 'Checkout' again to create your requisition.
- One easy way to look up all Catalog Suppliers is to check the box 'Catalog Suppliers Only' on the Suppliers dashboard page.







- There's no visual distinction between the two types of Catalog suppliers until you click into them individually. When you click into the supplier, a Roundtrip/Punch-out Catalog is notated by the circular arrow symbol to the left of the name, and a Hosted Catalog is notated by a folder symbol to the left of the name – see screenshots below.
- Roundtrip/Punch-Out symbol is circular arrow below:

Hosted symbol is folder icon below:

- (Note: If you don't see either symbol or a link for 'ABC for NJIT' or 'ABC Catalog' next to it that means the supplier you clicked into doesn't have a Catalog, and any orders entered with that supplier must be done as a Non-Catalog Item – see 'Creating a Non- Catalog Item' instructions).
- To begin a Hosted catalog purchase click on the folder icon or the 'ABC Catalog' link next to it. This action will bring up the supplier's Catalog within Highlander eMerchant.


 **Highlander eMerchant**


-- CMF Catalog Search marketplace...   


 **CMF Business Supplies, Inc. > CMF Cat...**
NJIT > CMF Business Supplies, Inc. > CMF Catalog


CMF NJIT Catalog
[Products and Services](#)

8943 listings. List 20 Sort by Name

 **AAG101042**
CALENDAR REFILL PEBBLE
Shipping: Manual Order Delivery

 **AAG102220027**
PLANNER ASPIRE WM SM
Shipping: Manual Order Delivery



CMF Business Supplies, Inc. \$10.04 / Each
 [Add to List](#) [Add to Cart](#)

CMF Business Supplies, Inc. \$10.74 / Each
 [Add to List](#) [Add to Cart](#)

- The left side of the page will list out the product names and codes.
- At the top of the page is a search box to search for products within the supplier's catalog.

- On the right-hand side it will list how many items are in this supplier's catalog (CMF lists 8943). The number of products showing on each page defaults to 20 but you can change that. You can also sort by Name, Code, Lowest Price or Highest Price.
- Once you locate the items you want to purchase you can adjust the quantity if you need to and then click '**Add to Cart**'.
- Once you have added all the items you want to your shopping cart, you will then click the Shopping Cart icon in the top right corner.
- Within the '**Shopping Cart**', review the items and then click '**Checkout**' to start the creation of your requisition

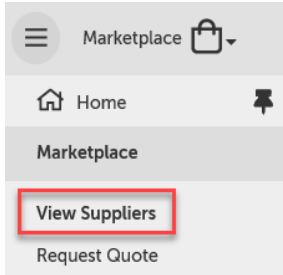
CMF Business Supplies, Inc.

Product			Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>	 AAG101042 (AAG101042) CALENDAR REFILL PEBBLE		<div><div>1</div><div>+</div><div>-</div></div>	\$10.04 / Each	\$10.04	Details
<input checked="" type="checkbox"/>	 AAG102220027 (AAG102220027) PLANNER ASPIRE WM SM		<div><div>1</div><div>+</div><div>-</div></div>	\$10.74 / Each	\$10.74	Details
<input checked="" type="checkbox"/>						Supplier Total: \$20.78
						<div>Checkout</div>

- See '**Checkout Process**' instructions to complete the requisition.

Purchasing a Non-Catalog Item

- Search for and select the desired supplier from the **'View Suppliers'** tab under Marketplace or the **'Supplier'** tab on the Dashboard page, like you would for any supplier.



Then/Or:

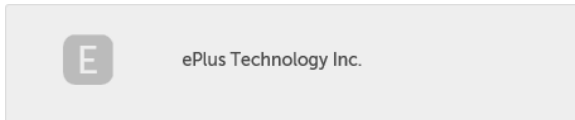


Supplier

☐ Favorite Suppliers

Search

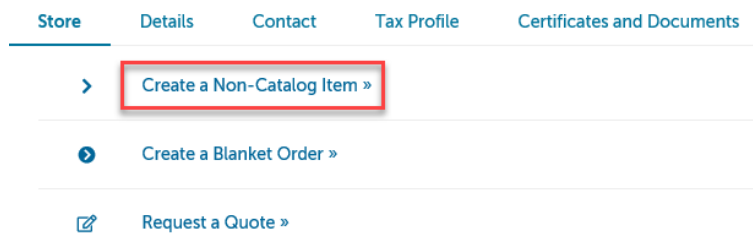
- Click on the company name or anywhere in the box



- Click **'Create a Non-Catalog Item'**

ePlus Technology Inc.

NJIT > ePlus Technology Inc.



- Type the name of the item you want to purchase, then click **'Next'**

Create a Non-Catalog Item

NJIT > ePlus Technology Inc.

Name Search Item Details

Item Name *

< Previous **Next >** Cancel

- (After clicking Next eMerchant may offer product suggestions based on the item name you input – the top of the page will say **‘Products similar to “Example Item Name” have been found’** and it will list a bunch of products below. If this happens and you don’t need the suggestions, **just scroll to the bottom of the page and click ‘Next’ again.** This will bring you back to the **‘Create a Non-Catalog Item’** page to complete the information)
- Fill in fields marked with a red asterisk (*) as they are required:
 - **‘Name’** - pre-filled in from your previous entry.
 - **‘Unit Price’** – type the unit price of the product, or the total cost if you’re attaching a quote.
 - **‘Unit of Measure’** – type the Unit of Measure or select it by clicking the drop down. If you’re not sure or nothing applies just leave as ‘Each’.
 - **‘Description’** – type a basic description of product, this must reflect what the item is - ‘consumables’ or ‘advertising material’ are not acceptable descriptions. This is what the supplier will see on the purchase order and remittance advice. If you have a quote then write ‘Please see attached quote for Description’.
 - **‘Product Code’** – type in the supplier’s product number, if known.
 - **‘Manufacturers Part ID’** – If the supplier is a reseller, you may type the additional product ID number that refers to the manufacturer’s product, if known

Create a Non-Catalog Item

NJIT > ePlus Technology Inc.

Name
Search
Item Details

Name *

Unit Price * ?
\$

Unit of Measure *
Each

Optional Details

Description

Product Code ?

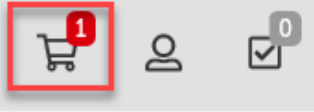
Category

Manufacturer Part ID ?

< Previous
Next >
Cancel
Add to Cart


- Next to the **‘Add to Cart’** button, you need to type in the quantity to be ordered.
- Click the **‘Add to Cart’** button.

- (After you add your item to the cart the system will automatically bring you back to the 'Create a Non-Catalog Item' page. So if you need to create another Non-Catalog Item with the same supplier you can go through the same process). If you don't need to create another Non-Catalog item with this supplier or once you have created all the Non-Catalog items you need and added them to your '**Cart**', click the '**Cart**' icon at the top right of your screen.



- Within the '**Cart**', review the items and then click '**Checkout**' to start the creation of your requisition. You can adjust the Quantity or Edit the product info from this page if you need to. Otherwise just click 'Checkout'

ePlus Technology Inc.

Product		Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>	<div> Example Item Name</div>	<div><div>1</div><div></div></div>	\$1,000.00 / Each	\$1,000.00	<div><div>Edit</div><div>Details</div></div>
<input checked="" type="checkbox"/>					Supplier Total: \$1,000.00
					<div>Checkout</div>

- If you have items from different suppliers in your '**Cart**' you can only '**Checkout**' one supplier at a time.
- See '**Checkout Process**' instructions to complete the requisition.

Checkout

Bill To **New Jersey Institute of Technology**

AHn:Accoonb Piyilble
New .krsey Institute of Technology (NJm
323 Martin L.uth4lr King Blvd
Fenster Hall
Newirk, NJ 07102
Unit St.ltes

S p To)-323 Martm luthlilr Kang Blvd.

l"ttta
Km SODWll50fl

New Jersey Instit 1.1te of Tech:ncolgy (FENSI
32.3 Martin Luthlr King Blvd
Univm:hy HelghtstFenster Hall
Newarlc NJ 07102
United States

011:1<lr luillon Sr VP fo, Finaooc lmd CFO

r7911111sahon U111t
1-400000)Sr VP for Finance, an CFO v
This is thO an .uton unit cmi .K ng L3G
ptm.:haw, for ft n uwd to 9aup1r:11mat. 8tu by
Org.mtz.a00num

o,oe,Type Standa,d

WB Ma.son Company

© Add notes

&P Warning. This supplier hllS order mtel|rahon enabl . ilnd s nny not < lllhl5-e NotE"ll or Ordrlr Attolr s datr

Calmed Reinforced Honging Folden, IJSTo

COAS	N0JC	RIND	ORGN	ACCT	PROG
1	215045	1001D0	409000	*13-4010	3.50□10

8

DecoRilek Plastic Magazine File, Two Snap+L..

COIS	N0JC	nNC	ORGN	ACCT	PBOO
1	2150-4cs	IMCJQO	4cIS0d0	71-4010	ISIQ10

Unitpric@o	Qty,	St.Jbtotal	T.x
S20_08 / 13ox		\$20.D8	\$0.00

il)Copy
Riemove

ll)Copy
(!)R move

Subtotal	\$35.41
Slipping-O	\$0.00
T.x	\$0.00
TotAI	\$35.41

9

Optionally create a release order selecting a blanket order to draw down from.

Or&lrNce1V1ng
ReceiveMa.rLJ.lilly

Jwrtification

© This Jul.td,etion -lnd.attlK:mentliare rcr e"llEIW by the -llppr0wr. They w1U not be l.erft to tile supplier.

..rblbc

11

Order attachments
Your rrls..30w Wllch ordar t:chr.r111w111t. ent» the uippl11K togvthill"1+u.th th. ordlr

O Drop files to attach, or browse

*Siu: limit SOM.

Justification Anachmenu

O Drop file-s-to attach, or brow

Size limit 50M

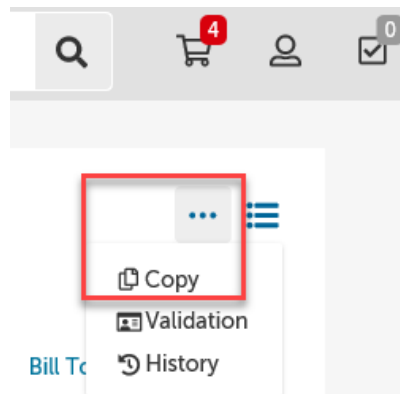
--- **D** Cancel

Checkout Process

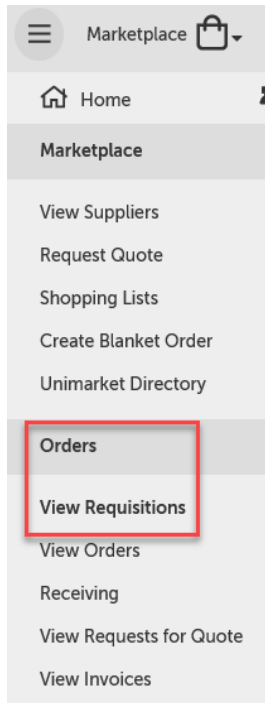
1. **Bill To:** select the appropriate Chart of Accounts to create the purchase order under.
2. **Ship To:** select the NJIT building the items should be delivered to. (This field will default to the last Ship To you selected)
3. **Attn:** Enter the Room Number followed by the last name of the person receiving the items. (The 'Attn' field will always default to your full name on each order. Due to a character limitation filtering into Banner, we feel it's best to list the Room number followed by last name b/c that's the most important info the Mail Room needs to deliver packages accurately. But each department can decide what 'Attn' naming convention works best for them).
4. **Organization Unit:** This is based on the security and allows others within the same organization to view the order. Always use 6-digit Org number.
5. **(***If NJIT's procedures have NOT been followed and an invoice has already been received you will need to change from a 'Standard Order' to a 'Retrofit Order'*** Click on the Order Type line and check box for 'Retrofit Order'. Input Related Invoice number if you have it, change Order Date, and leave Order Submission as 'Do Not Send' b/c we don't want the supplier receiving a new purchase order***).**
6. **Delivery Date:** Optional field, should be entered if the goods are required by a certain date.
7. **Account:** Search for or enter the Chart of Account and Index. Hit the Tab button to auto populate Fund & Organization fields. The Account codes are searchable and in some cases may default. After an Account code is entered hit Tab again to auto populate Program field.
8. **Use Copy Down or Split buttons** – The Copy Down button will auto populate all additional items below with the same FOAP, but be careful because account codes might need to be different for different types of items. The Split button will allow you to split the cost across different indexes. Split must be done on a dollar basis, but once saved the screen will show the percentage breakdown.
9. **Delivery Notes & Order Attachments:** Special notes the supplier may see (depending on order integration). Attach anything important that the supplier needs to see, like Quotes.
10. **Order Receiving:** Unless it's a retrofit order always leave it as "Receive Manually".
11. **Justification Notes & Attachment:** Any justification notes or attachments are for internal use only, the supplier will not see them. This will be your internal justification for making the purchase, which may or may not be necessary. However, you should always attach any NJIT printed products for the Branding/Print department to see. Another example would be to attach a contract or agreement with the suppliers. You can also attach justification forms.
12. **If you are a Browser** you can: **Save** the requisition to revisit it later, **Reassign** it to a buyer to make the purchase for you, or **Cancel** the order.
13. **If you are a Buyer** you can: **Checkout** to complete the order, **Save** to revisit later, **Reassign** to a buyer to make the purchase for you (should only be done if you don't have access to the Index being used), or **Cancel** the order. (If a Browser Reassigns a requisition to you, you will be notified by email. You can access the requisition by clicking on your **Tasks** icon in the top-right corner and selecting 'Incomplete Requisitions'. Find the requisition, click 'Checkout' and you'll start the Checkout process from the beginning)

Approvals and Requisition Status

- Once you have Checked Out your requisition it will be sent to the relevant Approver(s) for the Organizational (Orgn) code used and the dollar value of the purchase based on the established Delegations.
- The Approver may approve, decline or send a comment on the requisition.
- Comments will be notified via an e-mail and can also be viewed within the requisition by clicking on the Comments tab.
- Once approved, the Buyer will receive an e-mail advising the Order Number of their requisition. The Purchase Order will be sent to the Supplier from the system.
- If your requisition is '**Declined**' you will need to make a copy of the original requisition, amend any issues raised by the approver and re-submit
 - Bring up the Declined Requisition, click on the 3 dots in the top-right corner (Actions menu) and click '**Copy**', then amend any details and click '**Checkout**' as normal



- After you have successfully created a requisition you can monitor its progress from your Dashboard on Highlander eMerchant.
- To track a requisition:
 - Go to **Marketplace**, under '**Orders**', click '**View Requisitions**'



- When selecting the **'View Requisitions'** screen, the top portion of the screen allows you to search for a requisition (click on **'More Options'** if required). Select from one or more of the options and then click the **'Search'** button

Requisitions

☒ Connected Suppliers Only

☐ Customize Dates

Search

Requisition	Buyer	Supplier	Type	State	Approvers	Created	Total
R1801233	Rosalyn Manning	B & H Photo Video (cXML orders)	Standard	Approved		1/23/2019 12:47 PM	\$446.76
R1801232	Rosalyn Manning	CMF Business Supplies, Inc.	Standard	Approved		1/23/2019 12:45 PM	\$51.98
R1801231	Steve St edward	All-Ways	Standard	Pending	Conrad Corpus, Lily Chang	1/22/2019 11:07 AM	\$0.00
R1801230	Chelsea Laday	ABC Corporation	Blanket	Pending	Joseph Myers, Stanley Stec	1/17/2019 2:06 PM	\$20,000.00

- To select a requisition, click the requisition number from the list
- The Requisition displays as below:



Requisition R1801229

NJIT > B & H Photo Video (cXML ord...

Requisition

Requisition Number **R1801229**

Buyer **Chelsea Laday**

Requisition Date **1/17/2019 1:42 PM**
Approval begun on 1/17/2019 1:42 PM

State **Approved**

Organization Unit **(1-NJIT_ORG) 1-NJIT**
⇒ **(1-401000) University Budgeting** [Edit](#)

Payment Type **On Account**

Order **UP500926**

Originators

Order Date

Order Submission **Send Electronically**

Approval Chain

Items Justification Approvals Comments

B & H Photo Video (cXML orders)

Product	State	Qty.	Price	Subtotal
ST650P Universal Tilt Wall Mount nbsp for 3... Peerless-AV	Released	1	\$63.69 / Each	\$63.69
Account 1-215080-100000-401000-756108-350010	100.00%			
Subtotal				\$63.69
Shipping				\$0.00
Total				\$63.69

- The various approval statuses include:
 - Approved** – approved and advanced to the next level
 - Declined** – not approved and sent back to buyer, Declined requisitions can only be copied and edited for resubmittal by the buyer who originally created the requisition after any amendments have been made.
 - Escalated** – skipped an individual to advance to the next level of approval.
 - In Progress** – waiting for approval at that level.
- Once a requisition is completely approved, a purchase order is generated and sent to the supplier. An email with the purchase order number and details of the purchase order is sent to the Buyer
- You may also receive a confirmation email from the supplier once they process the order
- You can view a list of recent orders from the Transactions Dashboard or search for an order from the Orders menu **‘View Orders’**
- Once the goods or services are received, you will need to go into Highlander eMerchant and acknowledge that the goods/service has been received. Receiving the goods/services on the order allows the payment of any invoices for the items ordered. Please see **‘Receiving How-To Guide’** for instructions.

Receiving How-To Guide

The **Receiving** is an important part of the matching process and must be completed to allow the invoice to flow through for payment.

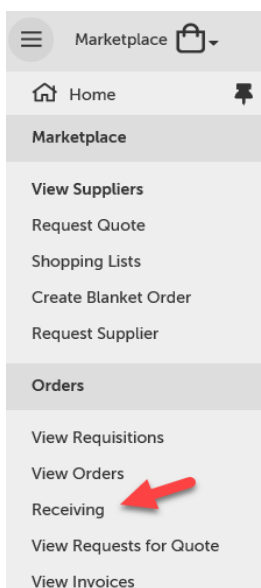
- When the goods or services have been supplied, the Buyer will be required to receive them in Highlander eMerchant. This is to acknowledge that the goods or services have been provided as ordered.
- Invoices will not be able to be paid until the necessary receiving action is completed.

There are 3 ways to get to Receiving. 1) Within your Dashboard, under Transactions in “**Open Receiving**” the most recent orders are displayed that are open for receiving. To manually receive products or services, click on any part of the order (supplier name, order number, or order amount). 2) Click on Marketplace at the top, under **Orders** select **Receiving**. 3) Click on the Tasks icon in the top-right corner and select **Outstanding Receiving**.

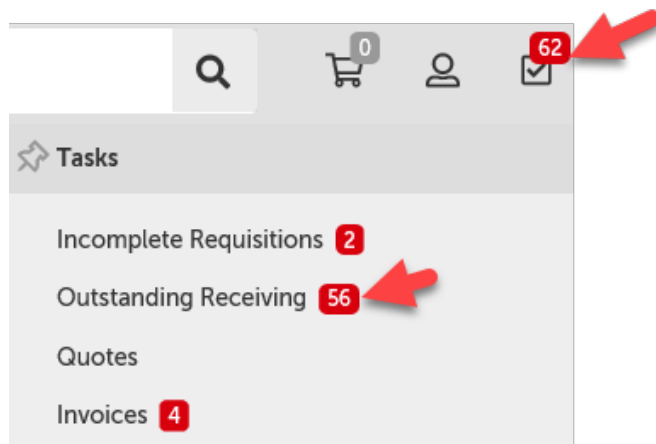
1) From Dashboard, Transactions:

Open Receiving			
Office Depot	UP100034	3/14/2018 1:02 PM	\$28.49
Fisher Scientific	UP100033	3/7/2018 5:01 PM	\$46.20
Fisher Scientific	UP100032	3/7/2018 4:59 PM	\$46.20
Fisher Scientific	UP100031	3/7/2018 4:59 PM	\$46.20
View open orders			

2) From Marketplace tab in top-left corner:



3) From Tasks icon in top-right corner.



From the Receiving screen you can select  **Receive All** or  **Receive** next to the appropriate order.


A new window will appear to allow you to receive the entire order (default) or select lines of the order and enter the relevant quantity received in the **'Received Quantity'** field.

The screenshot shows the 'Receive Order UP100034' window. It features a title bar with a close button. The main area contains a form with the following fields: 'Action*' with a dropdown menu set to 'Receive'; 'Receiving Date*' with a date picker set to 3/15/2018, 7:11 AM; and a 'Note' text area. Below the form is a table with two columns: 'Item' and 'Received Quantity'. The table has two rows: 'BIC(R) Soft Feel(R) Retractable Ballpoint Pens, Medium Point, 1.0 mm, Black Barrel, Black Ink, Pack Of 12' and 'Post-it(R) Super Sticky Notes, 3 x 3, Rio de Janeiro Collection, 90 Sheets Per Pad, Pack Of 12 Pads'. Both rows have a value of '1' in the 'Received Quantity' column. At the bottom of the window are 'OK' and 'Cancel' buttons.

To ensure accuracy, review each line against the delivery docket or other appropriate document from the supplier. If you have nothing to receive against a particular line place a 0 in the **'Received Quantity'** field.

The date is the actual date of receipt, this will affect payment terms established with the supplier, accuracy is important.

Creating a Blanket Order

Marketplace

Highlander eMerchant
Search marketplace...

Create Blanket Order

Details

Name *

Description

Supplier *

Amount *

Valid From * 1/10/2019 12:00 AM

Valid To * 11:59

Default Account Code *

COAS INDEX FUND ORGN ACCT PROG

Allow Release Order Coding

Tax New Jersey Institute of Technology

Sensitive

Bill To * Attn:Accounts Payable
New Jersey Institute of Technology [NJIT]
323 Martin Luther King Blvd
Fenster Hall
Newark, NJ 07102
United States

Ship To * Attn: Andrea Connell

Available To * Andrea Connell

Attachments

Drop files to attach, or browse
Size limit 50M.

Notifications

Send to Supplier

Alert Amount

Hide Amount from Supplier

Alert Date 12:00 PM

Justification can be entered once a supplier has been selected.

Approvals

*Organisation Unit

This is the organization unit you are making the purchase for. It is used to group transactions by organization unit.

Create Cancel

- Name *** : Identify the Blank Order so that it is unique and easily searchable
- Description** : This information can help distinguish Blanket Orders with similar names
- Supplier *** : Identify the vendor
- Amount *** : Total dollar value of the Blanket Order
- Valid From * / Valid To *** : Date range of the Blanket Order
- Default Account Code *** : Search or Enter the Chart and Index. The fund, organization, and program will automatically populate. The account codes are searchable.
- Ship To *** : Select the NJIT building the items should be delivered to

8. **Available To *** : Select users who will be able to enter orders against the Blanket Order
9. **Hide Amount From Supplier:** Check so the total Blanket Order value will not be sent to the supplier
10. **Alert Amount/ Alert Date:** Set thresholds to have emails sent when Blanket Order reaches a predetermined dollar amount or date
11. **Organization Unit:** This is based on the security and allows others within the same organization to view the order. Make sure to select the 6 digit organization code.

Blanket Order How-To Guide

****A Buyer or Browser must have additional access to create Blanket Orders****

To create a blanket order: select **Marketplace** then **Create Blanket Order** OR create a blanket order from the supplier's page [Create Blanket Order](#)

Details

Name *

Description

The **'Name' field** is a free form. There may be multiple Blanket Orders on one supplier, so the name to identify the Blanket Order should be unique but also able to be searched easily. The **'Description' field** is an area to put more details of the Blanket Order. This information can help distinguish between Blanket Orders with similar names.

Enter the Blanket Order using the standard process outlined in the Buyers guide.

Notes:

- The user who prepares the Blanket Order will become the owner/creator of the Blanket Order and will be the only authorized user that can modify the Detail fields of the Blanket Order.
- Once a Blanket Order is in place, the standard item selection/creation and requisition process needs to be followed (see Buyer Guide – Create a Non-Catalog Item). This creates a Release Order that the supplier provides the goods or services against. The receiving is completed against this Release Order and the invoice is also paid against the Release Order.

Making changes to a Blanket Order

After a Blanket Order is created, the creator can edit the Blanket Order using the Actions menu (depicted by the "..."). The following actions will be available.

- **Copy:** useful when replacing current blanket order
 - *When Copying an existing Blanket Order, the Valid To and Valid from date range will need to be defined as those dates are not copied into the new blanket order*
- **Edit Access:** add or remove members to the blanket order
- **Edit Amount:** increase or decrease a blanket order value
 - *The edited Blanket Order will create a new Blanket Order number and all versions of the order are linked, so suppliers can still invoice the original order number and users can see*



the history

- **Edit Dates:** modify the Valid To Date
 - *Users cannot extend a Blanket Order once it has expired. This can only be done while the order is still valid.*

Drawing down on a Blanket Order

- Normal process is to be followed as per 'Buyer Guide' (Create a Non-Catalog Item) to identify the items to be purchased and add them to your cart.
- On the checkout page, the user selects the Blanket Order from the dropdown menu in the designated field.

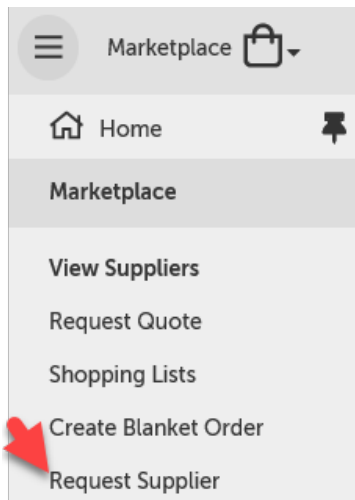
The screenshot shows a checkout interface. On the left, there is a 'Delivery notes' text input field. Below it is a 'Blanket order' dropdown menu with the selected option 'UP100444 - Building- Project (Facilities eMerchant Training)'. Below the dropdown is a small text note: 'Optionally create a release order selecting a blanket order to draw down from.' On the right, there is an 'Order attachments' section with a note: 'You can choose which order attachments will be sent to the supplier together with the order.' Below this note is a button that says 'Drop files to attach, or browse' and a text label 'Size limit 50M.'

- Once the information is completed, the user must click on the checkout button to finalize the issuance of the Release Order.
- The value of the resulting Release Order will be subtracted from the Blanket Order total. Release Orders are invoiced directly using the same process as a standard Purchase Order.

How To Request a New Supplier

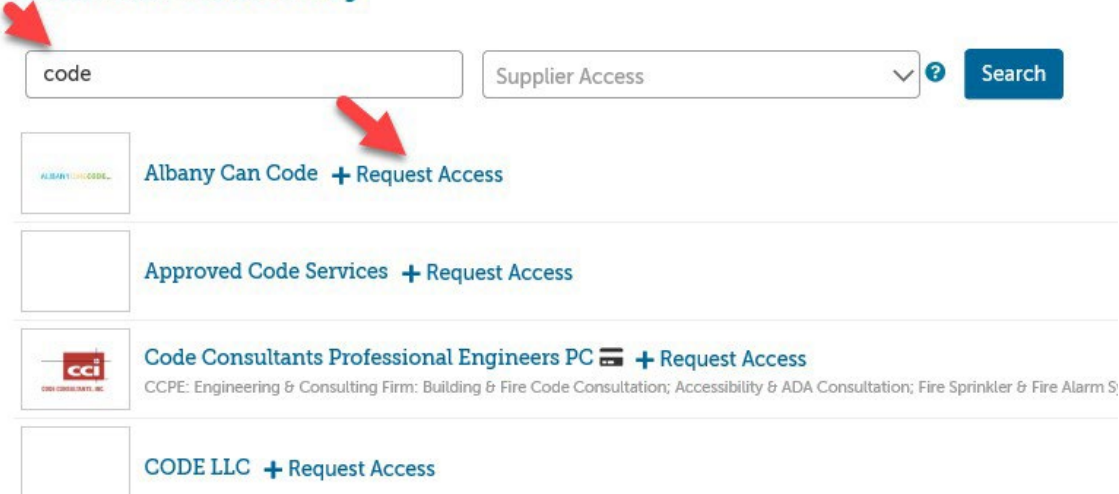
- If your search does not find the supplier you wish to use, you will need to select **‘Request Supplier’**. Suppliers must be in the system before a requisition can be entered. It is a procedure of NJIT that we only use approved suppliers.
- The NJIT Procurement team can request a supplier that has been used by NJIT previously or invite a completely new supplier to register. You will be notified when the supplier request has been processed and when the supplier has been made available to you in Highlander eMerchant.

1) In Highlander eMerchant, go to the Marketplace tab in the top left corner, and select ‘Request Supplier’








2) This will bring you to the Unimarket Directory. (Unimarket is the name of the company that operates the software for Highlander eMerchant. They are used by many colleges and universities, so you should search their full directory of suppliers first). Type in the name of the company you’re looking for – it’s best to only type in one or two key words to keep it simple and make sure you don’t miss the company you’re looking for.

Unimarket Directory



code Supplier Access ? Search

	Albany Can Code + Request Access
	Approved Code Services + Request Access
	Code Consultants Professional Engineers PC  + Request Access <small>CCPE: Engineering & Consulting Firm: Building & Fire Code Consultation; Accessibility & ADA Consultation; Fire Sprinkler & Fire Alarm S</small>
	CODE LLC + Request Access

If you find the company you're looking for, first click into the company name to check the email address, mailing address, etc. to make sure it's the right one. If it is the right company, then click on the 'Request Access' link located to the right of the company name. A pop-up window will appear and you will fill out as much info as you can, assign it to a Procurement rep, add any documentation you have in the Attachments section, then click 'Send'. (If the 'Request Access' link isn't listed next to a company name that means NJIT is already connected with that profile and you should email the Procurement team to check the status. More than likely we're waiting on documents before they can be released).

Request Access

Please select the reason that this vendor should be added to Highlander eMerchant.

Other

If you selected "other" on the above question please describe in detail the reason why this vendor is required.

*Initial Spend

Please provide the initial estimated spend amount for your first requisition that will be submitted

*Annual Spend

What is the anticipated annual spend going forward? Please estimate.

*Email Reminder

Without the vendors email, we cannot send them a request to register. Please make sure to enter the supplier contact's email address in the Contact Email at the top of the form.

Supplier Name Albany Can Code

Forward Request To * ?

Reason *

Attachments

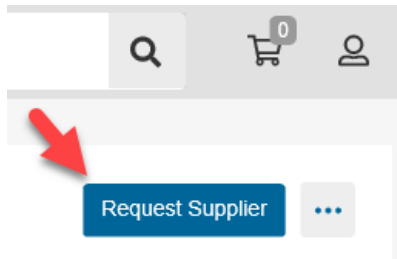
Drop files to attach, or [browse](#)

Size limit 50M.

Send

Cancel

3) If you don't find the company you're looking for in the directory, click on the blue 'Request Supplier' tab in the top right corner. A pop-up window will appear. Fill in as much info as you can, assign it to a Procurement rep, attach any documents, and click Send.



Request Supplier

*Annual Spend

What is the anticipated annual spend going forward?
Please estimate.

*Email Reminder

Without the vendors email, we cannot send them a request to register. Please make sure to enter the supplier contact's email address in the Contact Email at the top of the form.

Supplier Name * code

Contact First Name

Contact's Last Name

Contact Email

Contact Phone

Forward Request To * ?

Reason *

Attachments

Drop files to attach, or [browse](#)

Size limit 50M.

Send Cancel

4) The Procurement rep you assign it to will be notified and they will process it as soon as they can. The more information and documentation you provide the faster they should be able to process your request. If they have any questions they'll let you know. They will send

an invitation to the company to register in Unimarket and upload any requested documents. Once they do that the Procurement team will complete their registration, release them and notify you when they are ready to use.

