The Buyer role – step-by-step notes

1. You will receive an email message when you have a requisition item awaiting order consolidation, click on the message.
2. The items are listed as in the example below

   ![Example Image]

   **Items awaiting order consolidation**

<table>
<thead>
<tr>
<th>Supplier Title</th>
<th>Status</th>
<th>Qty</th>
<th>Price</th>
<th>Net Value</th>
<th>Consol Date</th>
<th>Requisition No</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Depot UK Limited</td>
<td>Review</td>
<td>25</td>
<td>£2.40</td>
<td>£60.00</td>
<td>03-11-2011</td>
<td>TECFIN238FINUSER1 Requisition Finance</td>
<td></td>
</tr>
<tr>
<td>Office Depot UK Limited</td>
<td>Review</td>
<td>10</td>
<td>£2.80</td>
<td>£28.00</td>
<td>03-11-2011</td>
<td>TECFIN238FINUSER1 Requisition Finance</td>
<td></td>
</tr>
</tbody>
</table>

   ![Close button]

   - **Change Status**
   - **Consolidate On Date**
   - **Consolidate Immediately**

3. The requisition number will begin with TEC or GEN and determines that the items have gone through the correct authorisation.
4. You can open each item to review it. **Please do not change anything on marketplace supplier items.**
5. In reviewing the item you should check
   a. An item requiring technical authorisation has not been submitted on a GEN template
   b. Compliance with Procurement division or College/Corporate Service policies and guidance
6. In the status section the “Review” radio button is checked. Once you are happy with the item check the “Released” button. The “Held” option is not relevant for marketplace items.

   ![Table Image]

   - **Required By Date**
   - **Consolidation Date**
   - **Consolidation Time**
   - **Consolidation Group**

7. Click on ”store item line” at the bottom of the screen
8. Alternatively, for **bulk changes** check the box next to each item
9. Select the “change status” option
10. Check the “Release” radio button

Select desired status

- Held
- Review
- Cancel
- Release

* Items will not be consolidated

11. The status of each item is changed to “released” click on OK.

To reject an item select the “Cancel” radio button.

12. The status of each item has been changed to “release”

13. The items can either be consolidated into a draft order immediately, or the Buyer can wait until they are satisfied that all requisitions have been approved and released before consolidating into draft orders.

14. After consolidation the requisition becomes a draft order and needs to be submitted.

15. To view, click on the Buyer tab, you will see the message “You have 1 unconfirmed order awaiting buyer”. Click on the message.
16. Select the draft order.

17. You are given the option to cancel the draft order in this screen:

You will need to enter a reason for the cancellation and then select “Save Reasons”
18. To view the commitment report go to “Edit items”

19. Click on view commitment report in the left hand menu

20. Go back to Edit order and submit. It will not require further authorisation unless the total cost is above £25k when it will be routed to Procurement.