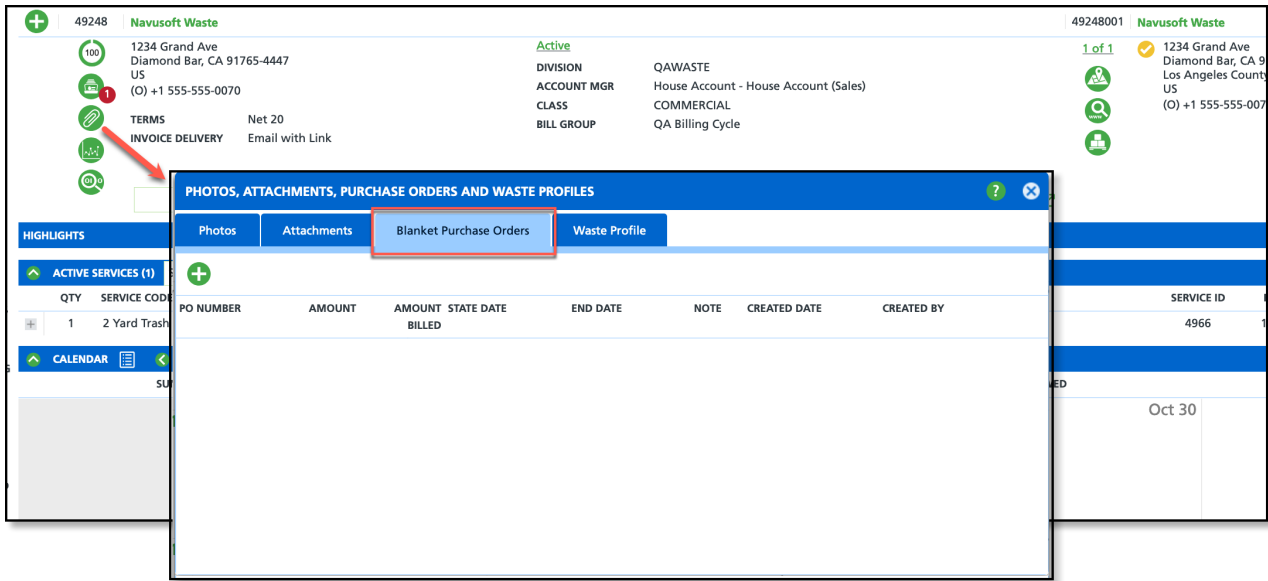


# Add a Blanket Purchase Order

Last Modified on 11/21/2024 8:34 am PST

**Pathway:** [Accounts](#) > [Search](#) > [Attachments Icon](#)

Create a Blanket Purchase Order for an account to bill recurring services, manual charges and on call orders to. Blanket Purchase Orders can be limited to a specific site under the account, or be made available to all sites. After a Blanket PO has been created, the option to delete will be unavailable if any records are linked to it. Use the [Blanket PO Management](#) tool under the Accounts module to review and manage all Blanket PO's for all accounts.



## Permissions

The following permissions are necessary to create and edit blanket purchase orders for an account:

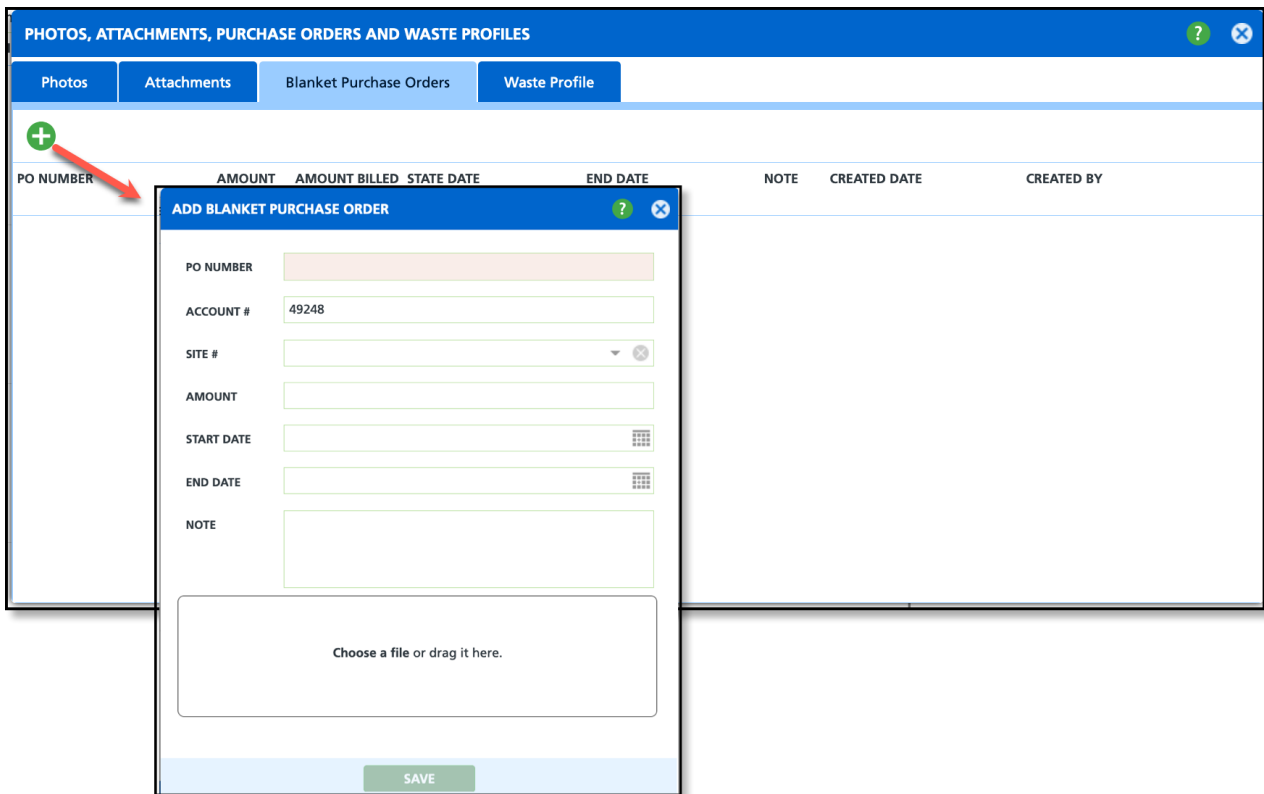
| Permission ID | Permission Name |
|---------------|-----------------|
| 5             | View Account    |

## Add a Blanket Purchase Order

In the *Add Blanket Purchase Order* popup editor, only the PO Number is a required field. Complete all additional fields based on the signed contractual agreement for the PO.



A Blanket PO can only be deleted if there are no records linked to it.



### Add to an Account

1. Select the **Attachments icon** from the Account screen to access the Blanket Purchase Orders tab.
2. Select the **Blanket Purchase Orders** tab from the pop up editor.
3. Click on the **green '+' icon**.
4. Enter a **PO Number**.
5. Select a **Site #** if the purchase order is site specific. Leave blank and the purchase order will be available for all sites belonging to the account.
6. Enter an **Amount**. Leave blank if the amount will not be capped.
7. Enter the **Start and End Dates** the blanket purchase order is active and available. Leave blank if dates do not apply.
8. Enter any **Notes** regarding the purchase order (optional).
9. Upload the purchase order (optional) by selecting within the 'Choose a file or drag it here' box.
10. Click **Save** when finished.

### Assign to a Work Order

The Blanket PO drop box has been added to the following locations:

- New and Existing Services
- On Call Orders
- Manual Charges

**CREATE ON CALL ORDER** ? X

| SCHEDULE DATE                          | SERVICE CODE                                   | ORDER TYPE  | QUANTITY               |
|--|--|---|------------------------|
| 11/21/24 Thursday <input type="text"/> | 2 Yard Trash Service <input type="text"/>      | <input type="text"/>  | 1 <input type="text"/> |
| REQUESTED BY <input type="text"/>      | CONTACT <input type="text"/>                   | REASON CODE <input type="text"/>                                  |                        |
| ORDER NOTES <input type="text"/>       |  |   | <b>PREPAYMENT</b>      |
| PO NUMBER <input type="text"/>         | <b>BLANKET PO</b><br>1234 <input type="text"/> | <input checked="" type="radio"/> EXTERNAL ID <input type="text"/> |                        |
| ROUTE <input type="text"/>             |  |   |                        |

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## Related Articles

[Blanket Purchase Order Management](#)

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