

Add a Blanket Purchase Order

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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.

The screenshot displays the Navusoft Setup interface for account 2626. The account details include: Account Name: 8100 Washington Ave, Houston, TX 77007; Status: Active; Division: Training Division; Account Manager: Terri Devico; Class: Residential; Bill Group: DEMO. A popup window titled "PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES" is open, with the "Blanket Purchase Orders" tab selected. The popup contains a table with the following data:

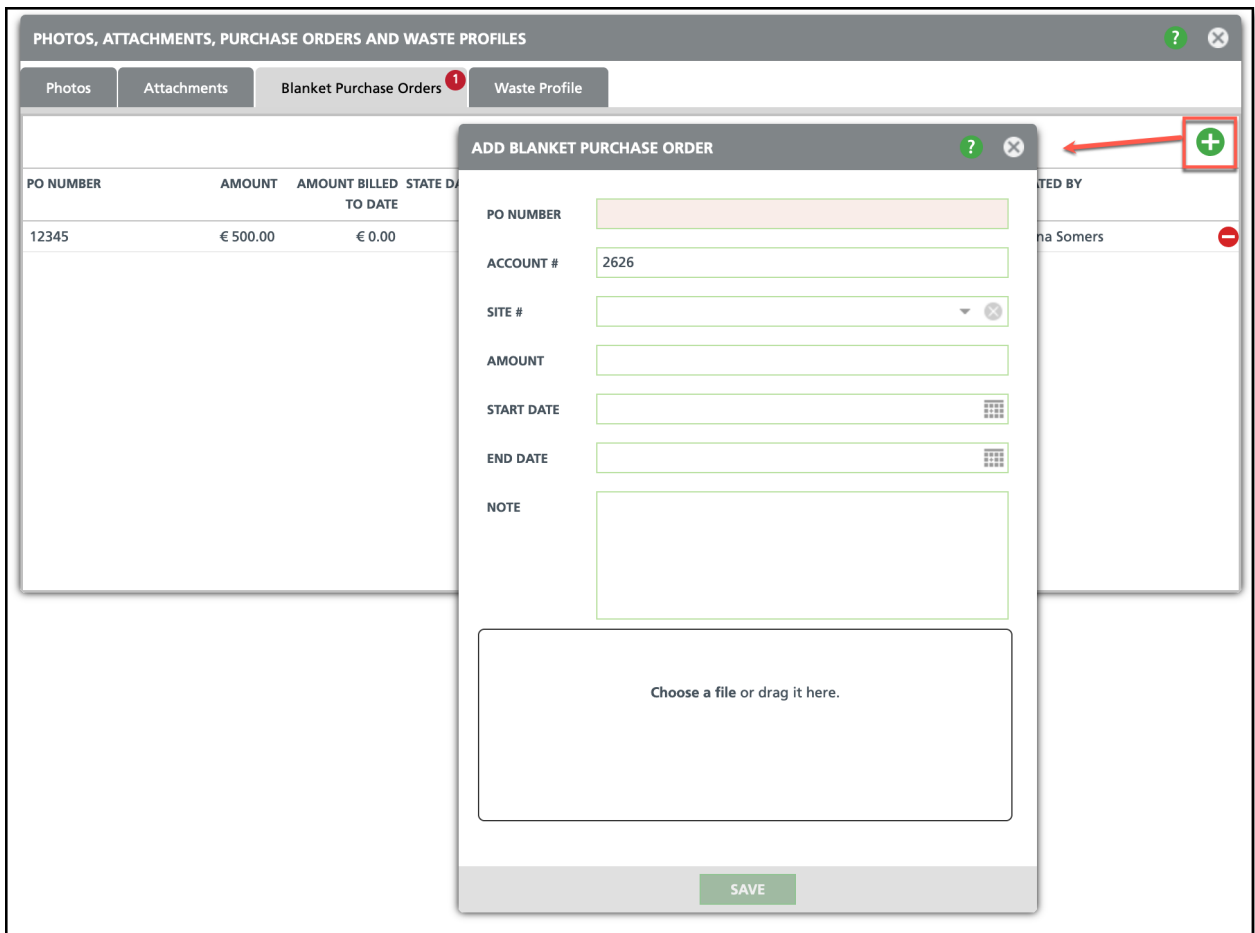
PO NUMBER	AMOUNT	AMOUNT BILLED TO DATE	STATE DATE	END DATE	NOTE	CREATED DATE	CREATED BY
12345	500.00	0.00				09/29/2022 7:53 am	Aliena Somers

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.



To Add:

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 a Blanket Purchase Order

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

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

The screenshot shows a web form titled "CREATE ON CALL ORDER". The form contains several input fields and dropdown menus. A red box highlights the "BLANKET PO" dropdown menu, which currently displays the value "12345". Other fields include "SCHEDULE DATE" (09/29/22 Thursday), "REQUESTED BY", "CONTACT", "PO NUMBER", "SERVICE CODE", "ORDER TYPE", "QUANTITY" (1), "ROUTE", and "REASON CODE". There is also an "ORDER NOTE" text area and a "PRE-PAYMENT" checkbox.

Related Articles

[Blanket Purchase Order Management](#)