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.

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 applies to a specific site. Leave it blank to make the purchase order available for all sites on the account.
6. Enter **Weight** and **Volume** limits along with their associated **UOM** to set maximum usage for the purchase order.
7. Enter an **Amount Limit.** Leave blank if the amount will not be capped.
8. Enter the **Start** and **End Dates** the blanket purchase order is active and available. Leave blank if dates do not apply.
9. Enter any **Notes** regarding the purchase order (optional).
10. Upload the purchase order (optional) by selecting within the 'Choose a file or drag it here' box.
11. 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
- Inbound Scale Tickets

Tracking Blanket Purchase Order Limits

After a blanket purchase order is linked to a work order, manual charge, or inbound / receiving order, the system tracks usage against the limits defined on the purchase order, if limit parameters were entered. In this example, clicking the Purchase Order search icon opens the Purchase Orders screen, where available purchase orders and their tracking limits are displayed.

Related Articles

Blanket Purchase Order Management