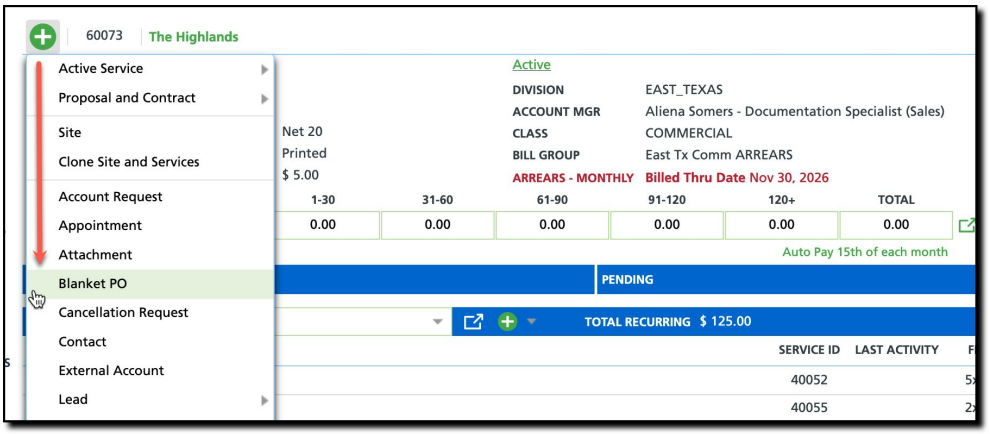
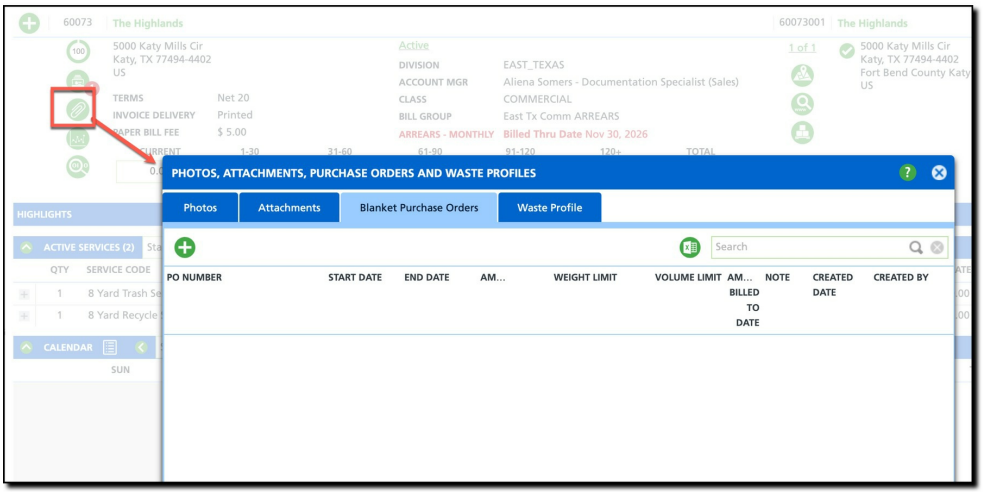
Add a Blanket Purchase Order

Last Modified on 09/21/2026 2:08 pm PDT

Pathway: *Accounts > Search > Attachments Icon*

The purpose of creating a Blanket Purchase Order (PO) for an account is to bill recurring services, manual charges and on call orders to. Blanket POs 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 *Accounts* > *Blanket PO Management* screen to review and manage all Blanket PO's for all accounts. Review the image below to see the two ways Blanket POs can be accessed for an account.





Permissions

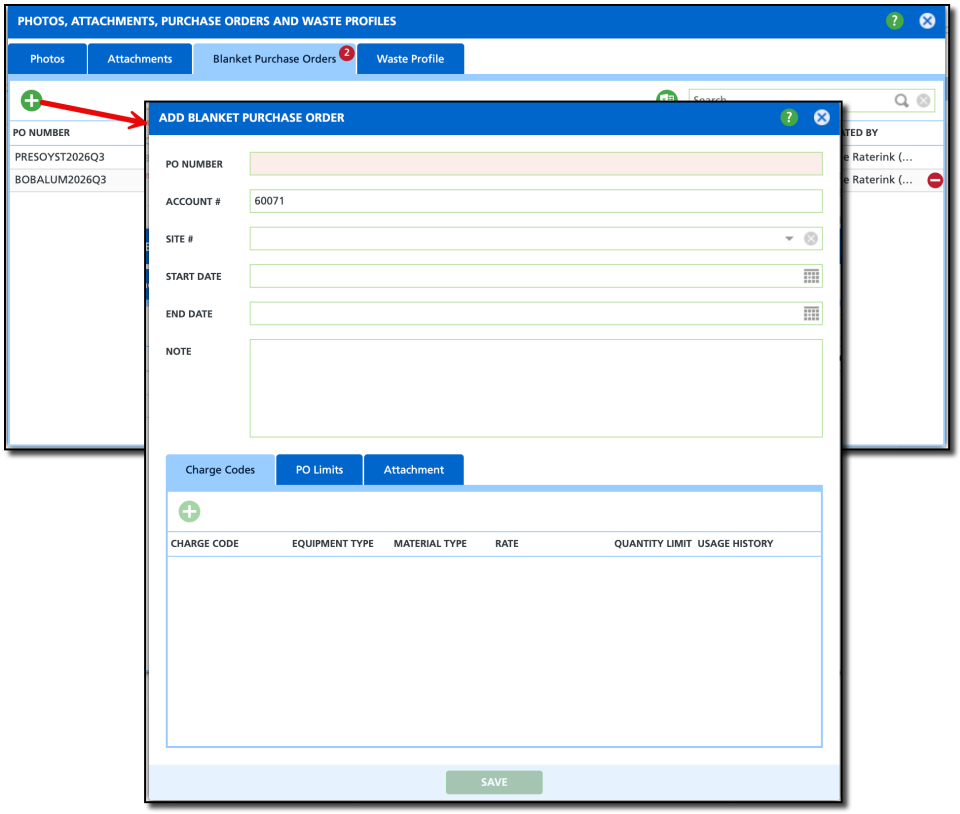
The following permissions are necessary to create and edit blanket purchase orders for an account:

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.



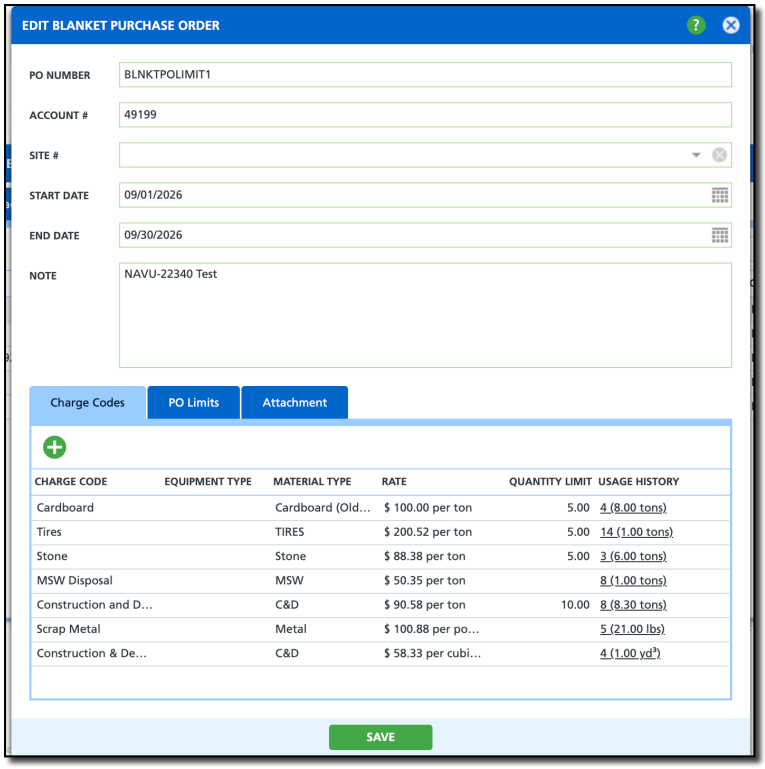
Add to an Account

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.

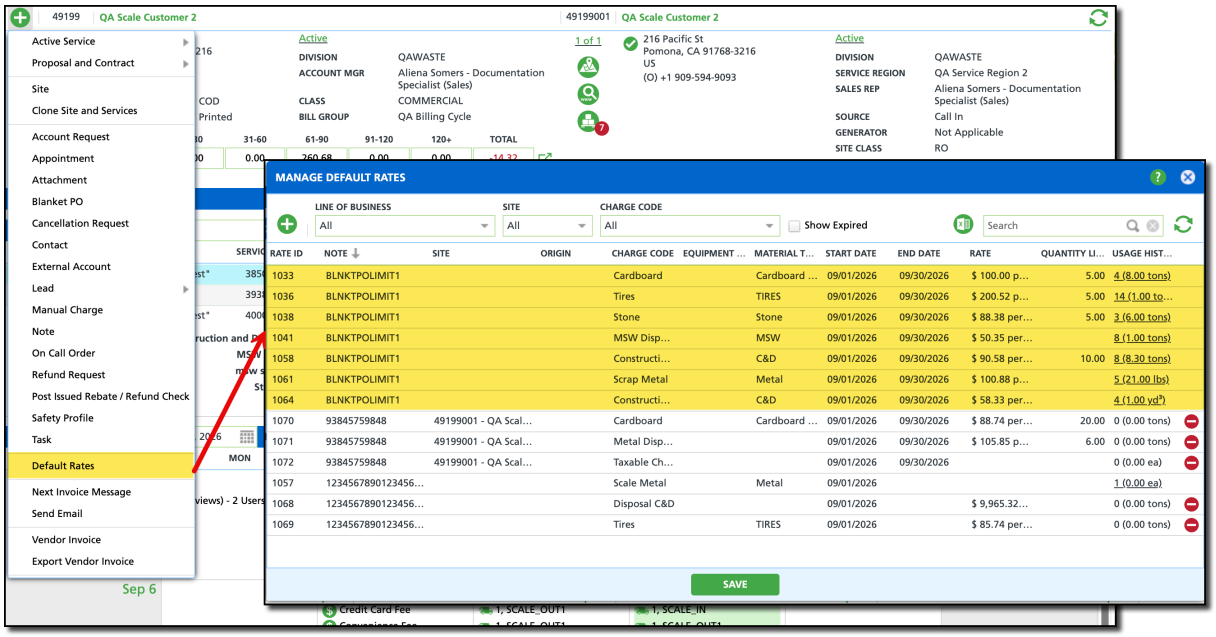
1. Select the **Blanket Purchase Orders** tab from the pop up editor.
2. Click on the **green '+' icon.**
3. Enter a **PO Number.**
4. Select a **Site #** if the purchase order is site specific. Leave blank and the purchase order will be available for all sites belonging to the account.
5. Enter the **Start** and **End Dates** the blanket purchase order is active and available. Leave blank if dates do not apply.
6. Enter any **Notes** regarding the purchase order (optional).
7. For some work orders like for Inbound and Outbound transactions, **Charge Codes** and **PO Quantity Limits** can be set using the tabs in the bottom half of the PO.
    a. Charge Codes cannot be entered until after the Blanket PO is saved.
    b. Select the *PO Limits* tab to enter the **Weight**, **Volume**, and **Amount** limits for the PO. Leave blank if it will not be capped.
8. Select the *Attachment* tab to upload the purchase order (optional) by selecting within the 'Choose a file or drag it here' box. There is a limit of one attachment for Blanket POs.
9. Click **Save** when finished.
10. After saving, reopen the Blanket PO to add default **Charge Codes** to be used for the Blanket PO, if needed.

Here is an example of a Blanket PO that has been set up for scale orders with default charge codes and quantities From the Blanket PO screen, the usage history is displayed along with the original quantity

entered.



If a Blanket PO is created with Charges and Quantity Limits as shown above, the charges will be automatically added to an account's Default Rates when the Blanket PO is added to the account. All default rates for an account are displayed in the *Manage Default Rates* screen.

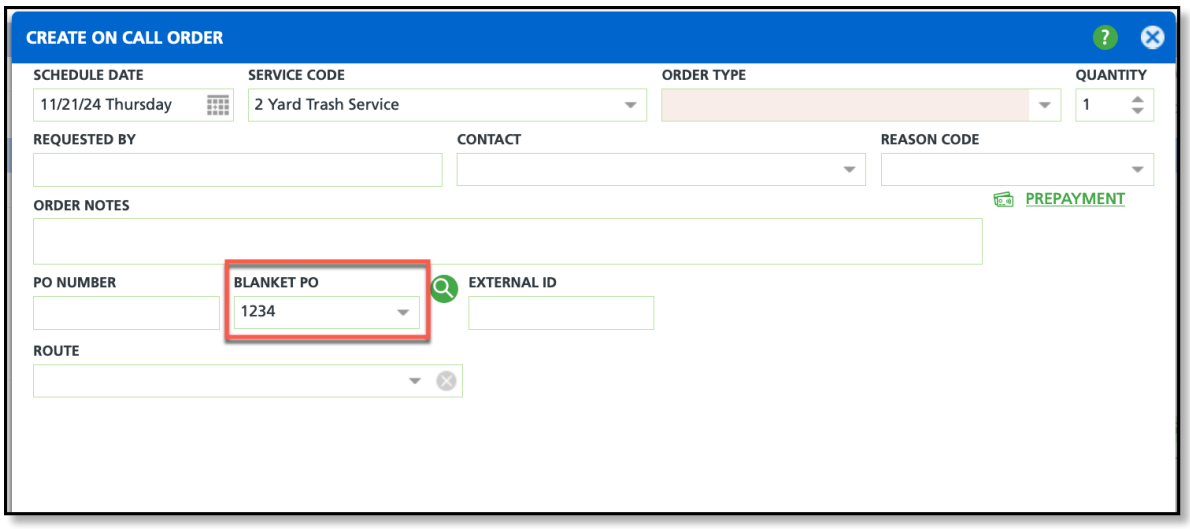


Assign to a Work Order

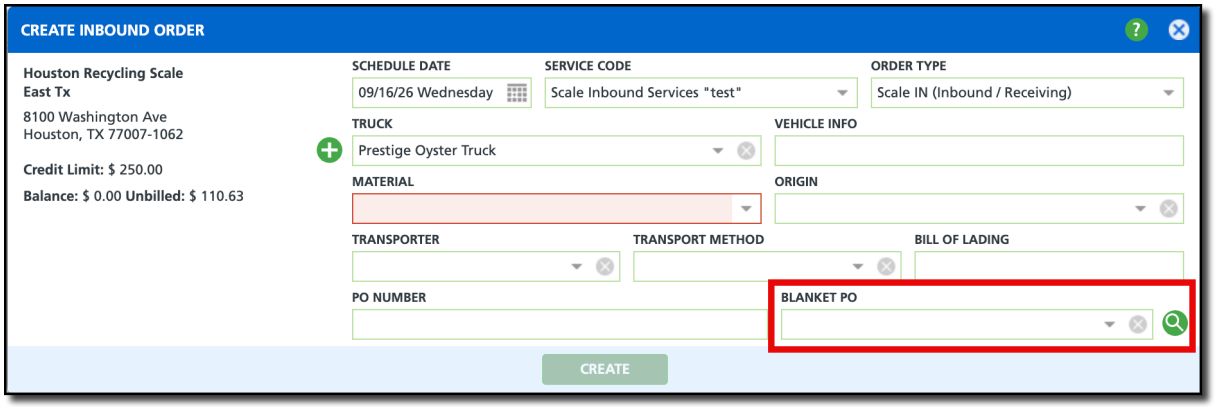
The Blanket PO drop box has been added to the following locations:

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

- Inbound Scale Tickets



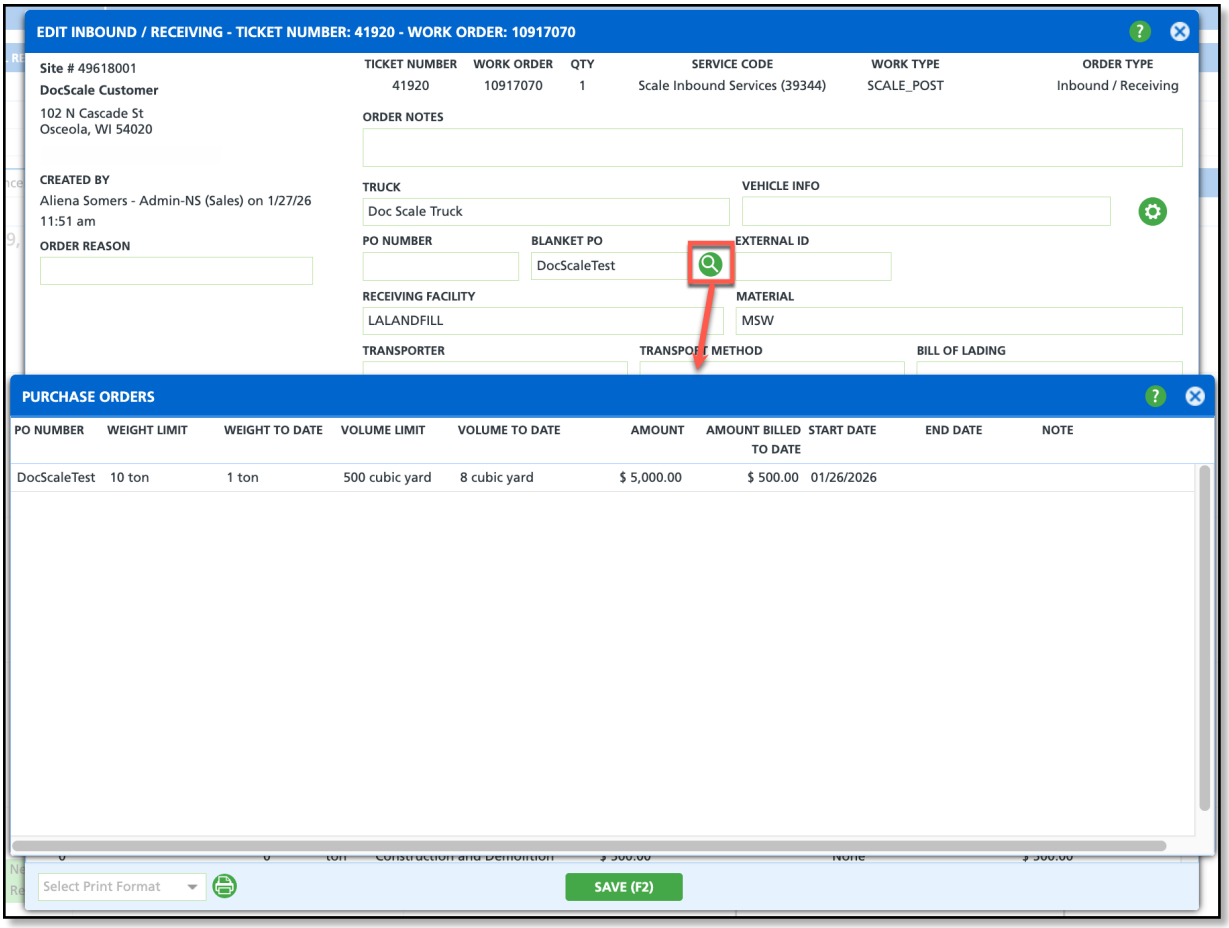
The Blanket PO drop down field will also be displayed for **Inbound** and **Outbound** orders if the selected site has a Blanket PO configured.



To learn more about Blanket POs with respect to Inbound and Outbound orders, referenceBlanket PO Usage for Inbound / Outbound Orders.

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
Blanket PO Usage for Inbound / Outbound Orders