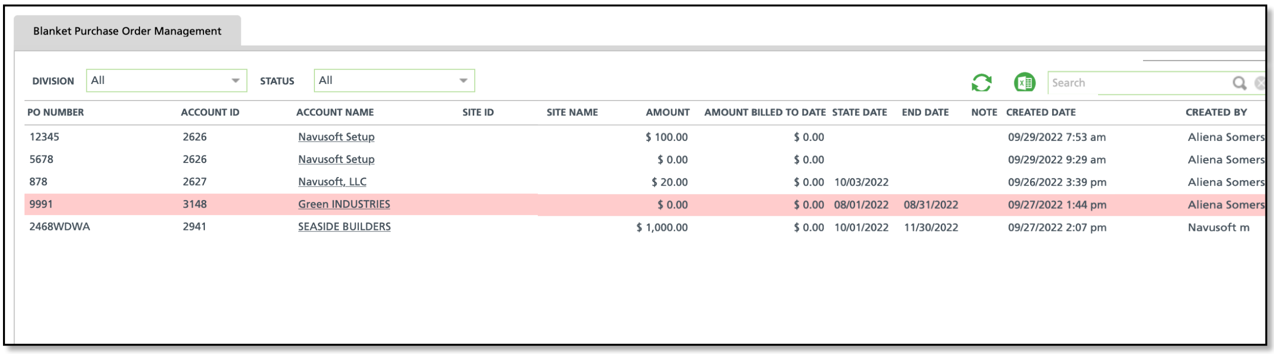
Blanket Purchase Order Management

Last Modified on 02/21/2024 10:49 am EST

Pathway: *Accounts > Blanket PO Management*

Use the Blanket Purchase Order Management screen to review active and expired Blanket PO's for all accounts. This screen also includes the option to export to Excel.

This screen offers a summary of accounts and their associated blanket purchase orders. It does not allow for adjustments to the Amount or Start Date and End Date values directly. Any necessary edits must be done through the respective account, which can be accessed by clicking on the account or site name.



PO NUMBER	ACCOUNT ID	ACCOUNT NAME	SITE ID	SITE NAME	AMOUNT	AMOUNT BILLED TO DATE	STATE DATE	END DATE	NOTE	CREATED DATE	CREATED BY
12345	2626	Navusoft Setup			$ 100.00	$ 0.00				09/29/2022 7:53 am	Aliena Somers
5678	2626	Navusoft Setup			$ 0.00	$ 0.00				09/29/2022 9:29 am	Aliena Somers
878	2627	Navusoft, LLC			$ 20.00	$ 0.00	10/03/2022			09/26/2022 3:39 pm	Aliena Somers
9991	3148	Green INDUSTRIES			$ 0.00	$ 0.00	08/01/2022	08/31/2022		09/27/2022 1:44 pm	Aliena Somers
2468WDWA	2941	SEASIDE BUILDERS			$ 1,000.00	$ 0.00	10/01/2022	11/30/2022		09/27/2022 2:07 pm	Navusoft m

Permissions

The following permission is required to view the Blanket Purchase Order Management screen:

Permission ID	Permission Name
439	Blanket Purchase Order Management

Fields and Filters

The following descriptions apply to the filters and fields found on the Blanket Purchase Order Management screen.

Field/Filter Name	Description
Filter Fields	
Division	Option to filter what displays by Division.

Status	Filters to only display Blanket PO's by the status selected. Status options include:
	• All
	  ◦ Default setting upon entry
	• Expired
	  ◦ Row will display in red for Blanket PO's with an End Date in the past.
	• Billed Amount Exceeds PO Amount
	  ◦ Row will display in yellow for Blanket PO's when the value in the '*Amount Billed to Date*' column is higher than the value in the '*Amount*' column.

Field/Filter Name	Description
Fields	
PO Number	Identifies the Blanket PO.
Account ID	Identifies the account the Blanket PO belongs to. To go to the account, double click within the row.
Account Name	Identifies the account the Blanket PO belongs to. To go to the account, double click within the row.
Site ID	Identifies the site the Blanket PO belongs to. Blanket PO's can be created and assigned to specific sites.
Site Name	Identifies the name of the site the Blanket PO belongs to.
Amount	Indicates the amount of the Blanket PO.
Amount Billed To Date	Displays the total amount that has been billed against the purchase order amount.
Start Date	Displays the Start Date entered when the Blanket PO was created.
End Date	Displays the End Date entered when the Blanket PO was created.
Note	Displays Notes that were added to the Blanket PO.
Created Date	Displays the date the Blanket PO was created in the system.
Created By	Displays the name of the user who created the Blanket PO.

Related Articles

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