



Add Photos, Attachments, Purchase Orders and Waste Profiles to Accounts



Last Modified on 02/22/2024 5:03 pm EST



Pathway: [Accounts](#) > [Search](#) > [Accounts](#)



From the Accounts screen, use the attachments icon to add photos, attachments, purchase orders, and waste profiles. Items added here are linked at the account level and can be accessed from any site view.

 41898 | **Navusoft Premier Waste And Recycling**

 8100 Washington Ave
Houston, TX 77007-1062 [Active](#)

  TERMS Net 20

  INVOICE DELIVERY PRINTED

DIVISION	DAYTON
ACCOUNT MGR	House Acct non System
CLASS	COMMERCIAL
BILL GROUP	DAY-BAD DEBT \ INACTIVE
ARREARS - MONTHLY	Billed Thru Date Dec 19, 2023
NEXT INVOICE DATE	
SOURCE	Cold Call
REBATE PAYMENT	Not Applicable

Permissions

The following permissions are necessary to access and use the Photos, Attachments, Purchase Orders and Waste Profiles screen:

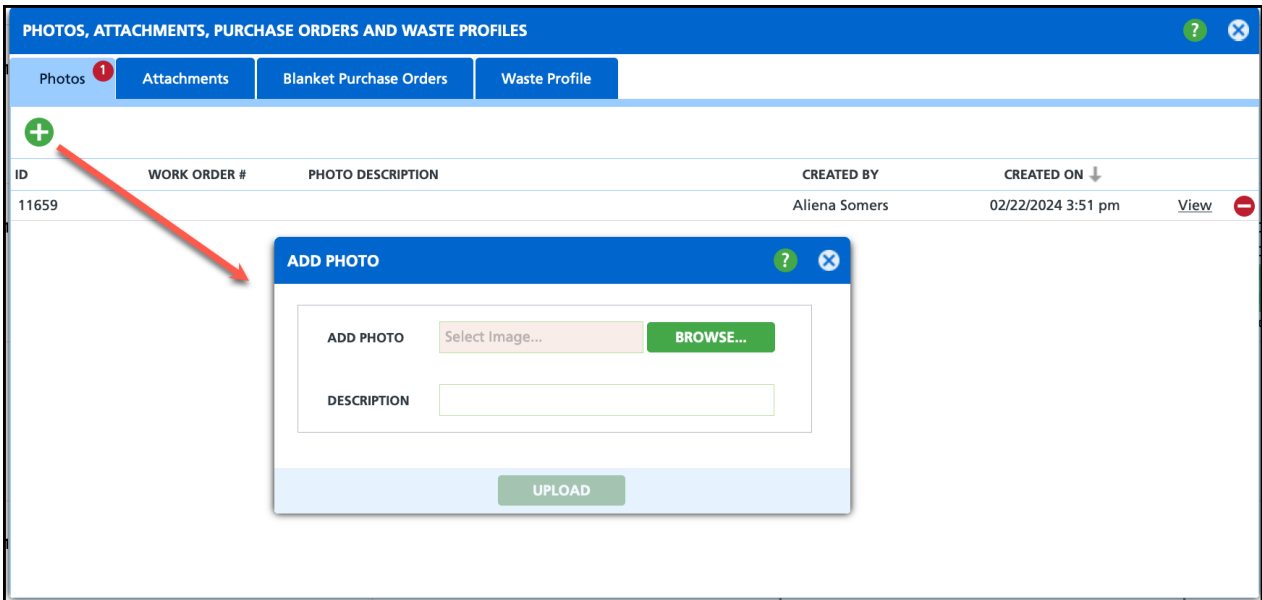
Permission ID	Permission Name
5	View Account
6	View Site

Add Photo

Add a photo to a site, and review photos attached to a work order in the photos tab.



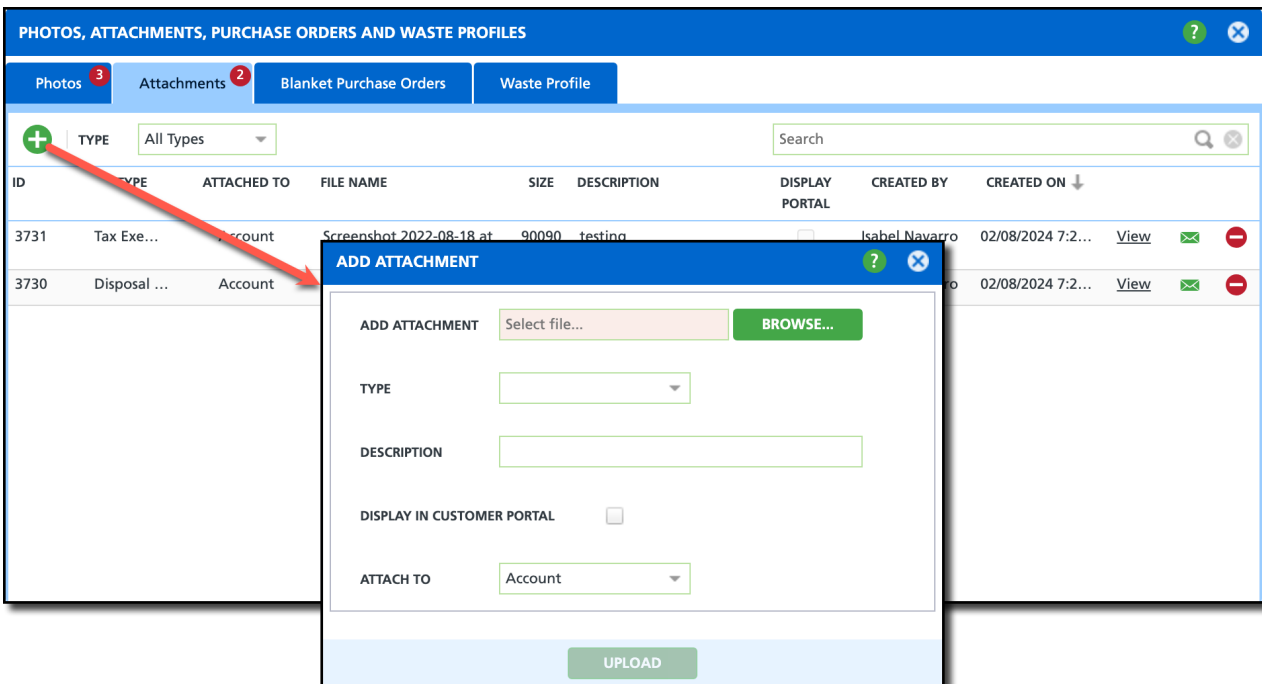
Upon Upload: Hover over 'View' for a preview of the photo. Select 'View' to open the photo attachment.



1. Select the **Paperclip icon** from the Accounts screen.
2. Select the **Photos** tab.
3. Select the **green '+' icon** from the upper left corner. The 'Add Photo' popup window will display.
4. Select **Browse** from the Add Photo popup.
5. Search and select the photo you would like to upload to the account.
6. Select **Upload** when finished.

Add Attachment

Add any necessary files and documents needed to be included for site information, such as tax exemption forms, disposal forms and more.



1. Select the **Paperclip icon** from the Accounts screen.
2. Select the **Attachments** tab.
3. Select the **green '+' icon** from the upper left corner. An Add Attachment popup window will display.
4. Select **Browse** from the Add Attachment popup.

5. Search and select the attachment you would like to upload to the account.
6. Select the **Type** of attachment. *Optional.*
7. Enter a **Description** for the attachment. *Optional.*
8. Select **Display in Customer Portal** and the customer will have access to the attachment in their portal account. *Optional.*
9. Select where the attachment will display. Options include: Account or Site.

Add Blanket Purchase Order

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 shows the 'Blanket Purchase Orders' tab in a software interface. A table lists existing POs with columns for PO NUMBER, AMOUNT, AMOUNT BILLED TO DATE, STATE, DATE, END DATE, NOTE, CREATED DATE, and CREATED BY. A red arrow points from a '+' icon to the 'ADD BLANKET PURCHASE ORDER' popup form. The form includes fields for PO NUMBER, ACCOUNT # (41898), SITE #, AMOUNT, START DATE, END DATE, and a NOTE field. At the bottom, there is a file upload area with the text 'Choose a file or drag it here.' and a 'SAVE' button.

PO NUMBER	AMOUNT	AMOUNT BILLED TO DATE	STATE	DATE	END DATE	NOTE	CREATED DATE	CREATED BY
777777	\$ 12.00	\$ 0.00	02/12/2024		02/26/2024		02/09/2024 11:38 am	Isabel Navarro
36363636	\$ 75.00						10 am	Isabel Navarro

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.

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 down field 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". At the top, there are four fields: "SCHEDULE DATE" (02/12/24 Monday), "SERVICE CODE", "ORDER TYPE", and "QUANTITY" (1). Below these are fields for "REQUESTED BY", "CONTACT", and "REASON CODE". An "ORDER NOTES" section contains a "PREPAYMENT" button. The "PO NUMBER" section includes a "BLANKET PO" dropdown menu, which is highlighted with a red rectangular box, and an "EXTERNAL ID" field. A "ROUTE" dropdown menu is at the bottom. The form has a blue header bar with a question mark icon and a close icon.

Add Waste Profile

Continue to [Waste Profile Setup](#) link for more information.

PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES

Photos ³ Attachments ² Blanket Purchase Orders Waste Profile

+ ? X

SITE ID	SITE NAME	PROFILE NAME	START DATE	END DATE
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ADD WASTE PROFILE ? X

SITE Navusoft - Demo

NAME

START DATE

END DATE

NOTE

ADD ATTACHMENT

SAVE

Related Articles

[Blanket Purchase Order Management](#)

[Waste Profile Setup](#)