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

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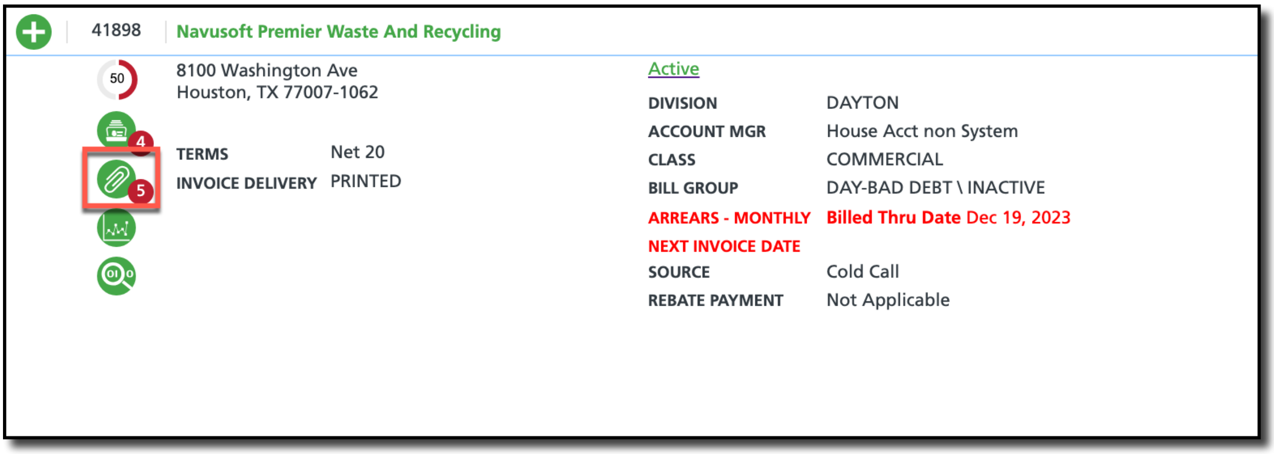
Pathway: *Accounts > Search > Accounts*

From the Account Details section of the Customer Service screen, click the attachments icon to add photos, documents, purchase orders, and waste profiles. The red item number alert displays a dynamic count based on the items available for the current site.



Permissions

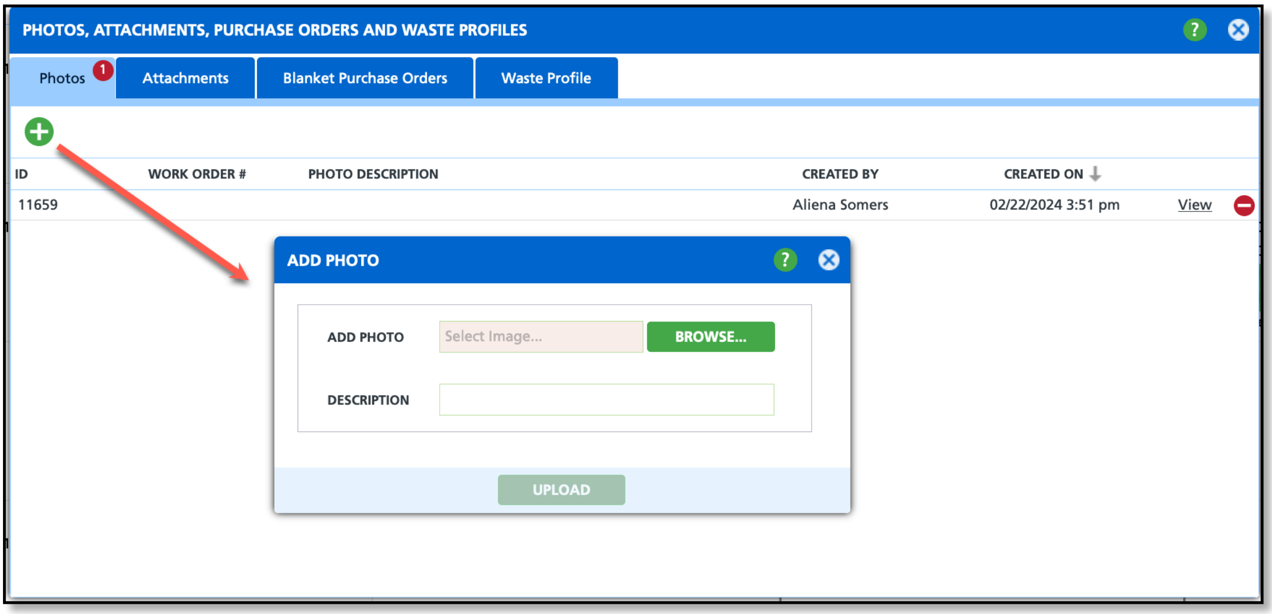
The following permissions are necessary to access and use the Photos, Attachments, Blanket Purchase Orders and Waste Profile screen:

Permission ID	Permission Name
5	View Account
6	View Site
32	Add Photo to Site Detail
33	Delete Photo from Site Detail
54	View Attachment
55	Edit Attachment
56	Delete Attachment
358	Edit "Display in Customer Portal" Setting on Attachments

Add Photo

Add photos to a site and view attached images in the work order's photos tab. Photos are specific to each site and are accessible based on the site currently displayed.

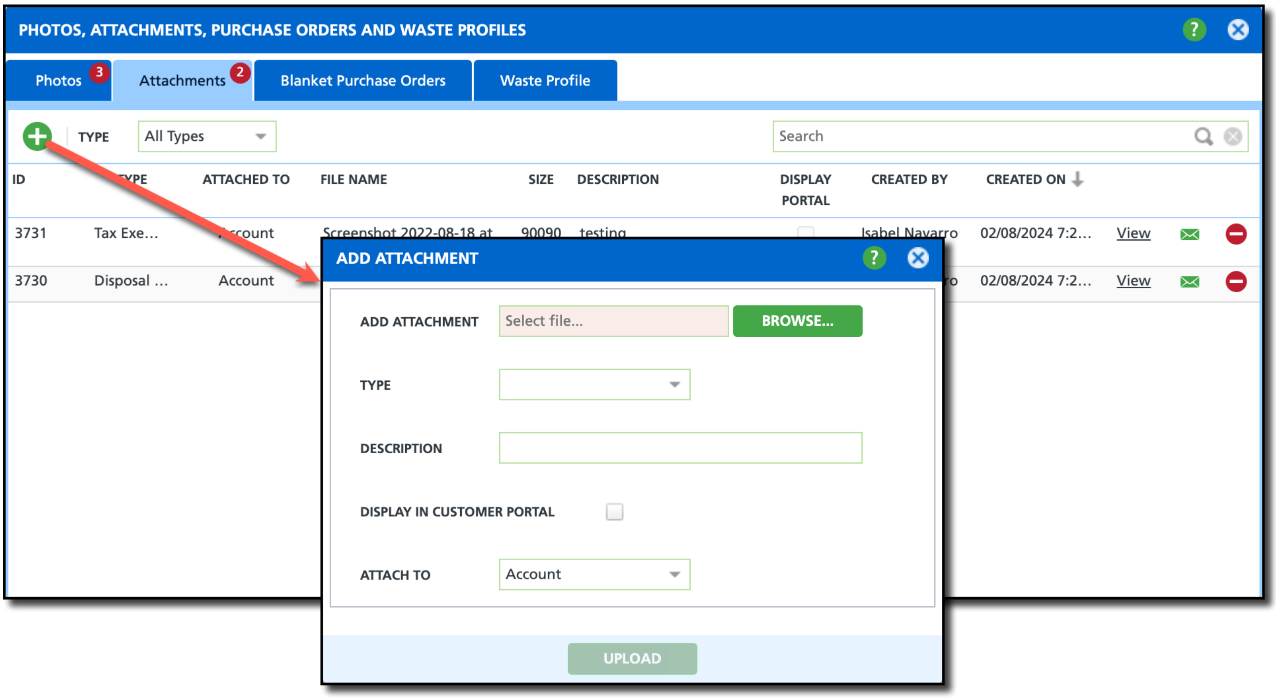
Upon Upload: Hover over 'View' for a preview of the photo. Select 'View' to open the photo attachment.



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

Easily attach necessary files and documents, such as tax exemption forms and disposal records, to a site or account. When added at the account level, these attachments are visible across all associated sites.

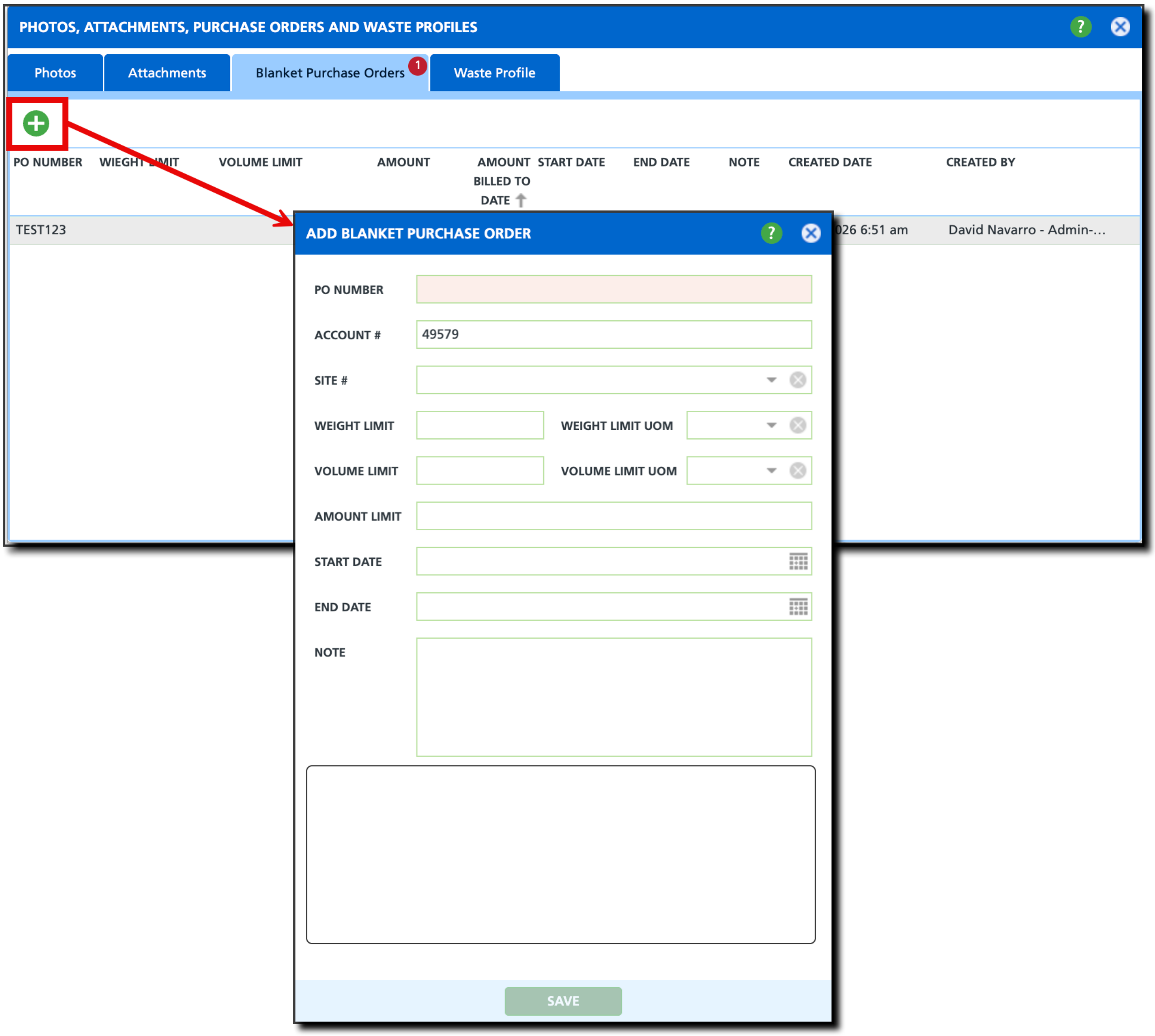


1. Select the **Paperclip** icon from the Accounts screen.
2. Select the **Attachments** tab.
3. Select the **green '+' icon** from the upper left corner. An Add Attachment popup window will display.
4. Select **Browse** from the Add Attachment popup.

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 <u>**if**</u> 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.



Add a Blanket Purchase Order

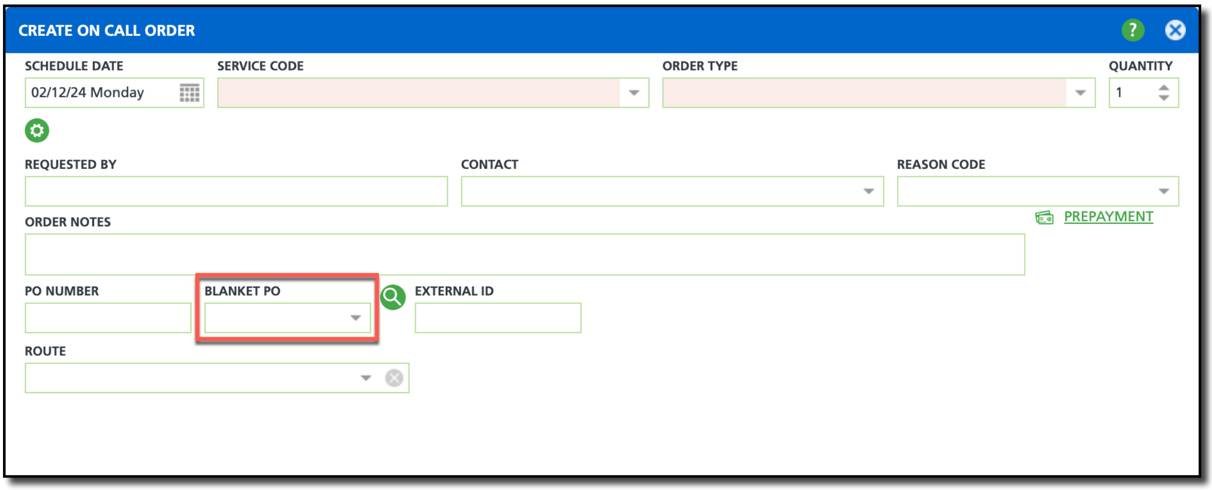
In the *Add Blanket Purchase Order* popup editor, only the PO Number is a required field. Complete all additional fields based on the signed contractual agreement for the PO. A Blanket PO can only be deleted if there are no records linked to it.

12. Select the **Attachments icon** from the Account screen to access the Blanket Purchase Orders tab.
13. Select the **Blanket Purchase Orders** tab from the pop up editor.
14. Click on the **green '+' icon.**
15. Enter a **PO Number.**
16. 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.
17. Enter a **Weight Limit** allowed for the purchase order. Leave blank if the weight will not be capped.
18. Enter the unit of measure (UOM) for the Weight Limit.
19. Enter a **Volume Limit** allowed for the purchase order. Leave blank if the volume will not be capped.
20. Enter the unit of measure (UOM) for the Volume Limit.
21. Enter an **Amount Limit** allowed for this purchase order. Leave blank if the amount will not be capped.
22. Enter the **Start** and **End Dates** the blanket purchase order is active and available. Leave blank if dates do not apply.
23. Enter any **Notes** regarding the purchase order (optional).
24. Upload the purchase order (optional) by selecting within the 'Choose a file or drag it here' box.
25. Click **Save** when finished.

Assign a Blanket Purchase Order

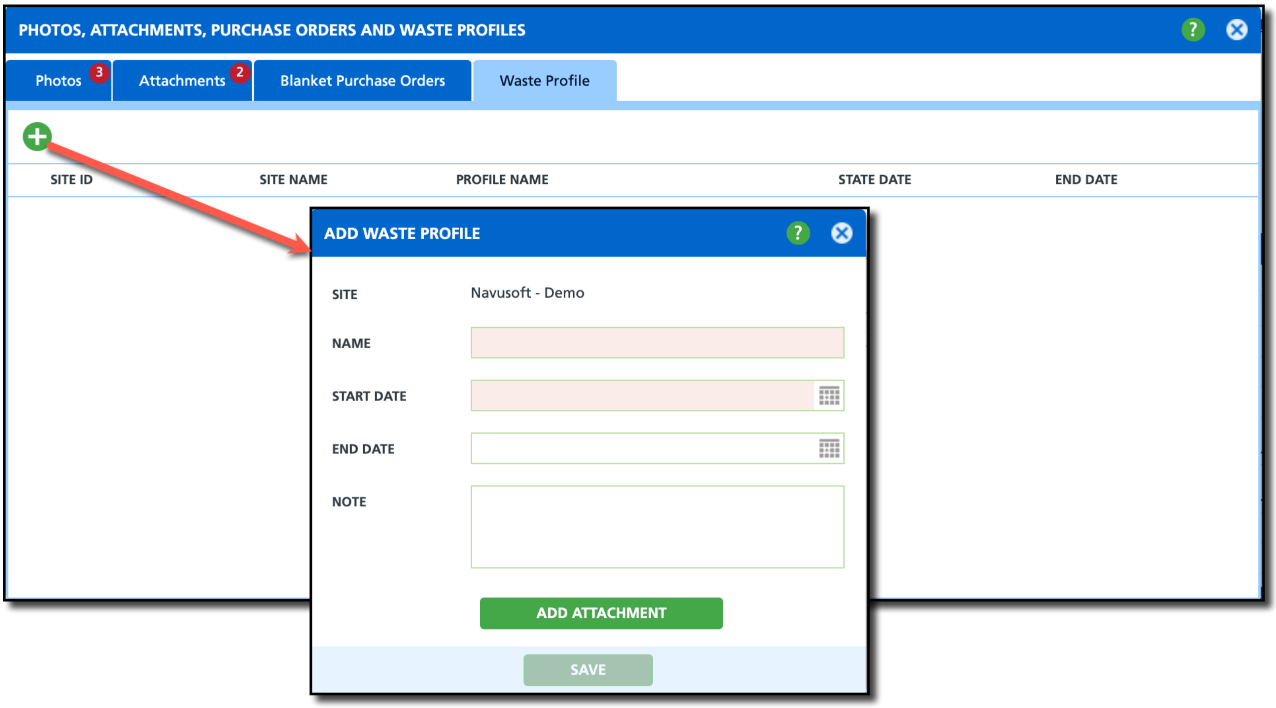
The Blanket PO drop down field has been added to the following locations:

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



Add Waste Profile

Continue to Waste Profile Setup link for more information.



Database Query Mapping

Use the Database Query Tool to audit the use of Blanket POs and Waste Profiles. At this time, Attachment and Photo data (including attachment types, file names and upload history) is not available to be queried via the Database Query Tool.

Database > Database Query

Blanket Purchase Orders

Here are some example mappings to audit Blanket POs, how they are used and how much revenue is being billed against them.

To Find	Use this Entity	Use this Display Field
PO assigned to a site	***Accounts and Sites***	**Site PO** Filter by **Site ID** or **Account ID**
Every Work Order that was billed against a Blanket PO	***Work Order***	**Workorder PO Number =** Blanket PO Number This entity can also be used to find PO by**Work Order Number** and/or **Account ID**
Revenue billed under a PO	***Revenue***	**PO Number** = Blanket PO Number
PO for Disposal/Scale trips	***Disposal Records***	**Workorder PO Number** Group results by **Disposallocation** or **Material** to see how a Blanket PO is being "consumed" across different facilities.

Waste Profile

Waste profile information is split between the customer's site setup and the specific charges applied to their work orders. Here are a few example ways to drill into the Waste Profile data.

To Find	Use this Entity	Use this Display Field
Site EPA ID	*Accounts and Sites*	**Site Epa ID**
Generator Type	*Accounts and Sites*	**Site Generator Type Name**
EPA Waste Code	*Work Order Charges*	**EPA Waste Code Abbreviations**
Manifest Status	*Work Order Charges*	**Is Manifested**

Related Articles

Blanket Purchase Order Management
Waste Profile Setup