

Purchase Order Entry and Billing Hierarchy

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Purchase orders can be added to an account or site in multiple areas. However, regardless of where a PO number is entered, all PO numbers follow a defined hierarchy during the billing process. Understanding this hierarchy is key to ensuring accurate billing and that the appropriate PO is applied to each transaction.

The screenshot displays a software interface for managing services and billing. On the left, a 'SERVICE ADDITIONAL FIELDS' dialog box is open, showing 'REASON CODE: ADD-Add Svc - New Service' and 'PO NUMBER: 4321 - Service'. Below this, a 'SERVICE NOTES' table is visible:

START DATE	END DATE	NOTE
		Service Reversal Disabled -- Service has already been billed

On the right, an invoice is displayed for 'Kwik Trip' at '100 Ridge Rd Osceola, WI 54020-7506'. The invoice includes a table of charges:

DATE	DESCRIPTION	PO #	QTY	RATE	TOTAL
06/16/25 - 06/30/25	8 Yard Recycle Service	1234 - Site	1	\$ 250.00 per month	125.00
06/16/25 - 06/30/25	8 Yard Trash Service	4321 - Service	1	\$ 346.40 per month	173.20
07/16/25	Paper Bill Fee - Commercial - 915852		1		7.00
	Fuel Surcharge-Commercial				14.91
	Fuel Surcharge-Residential				0.00
	Pearland Franchise Fee				14.91
Site Total					\$ 335.02

Below the invoice table, the 'INVOICE TOTAL' is \$ 335.02. A payment schedule table is also present:

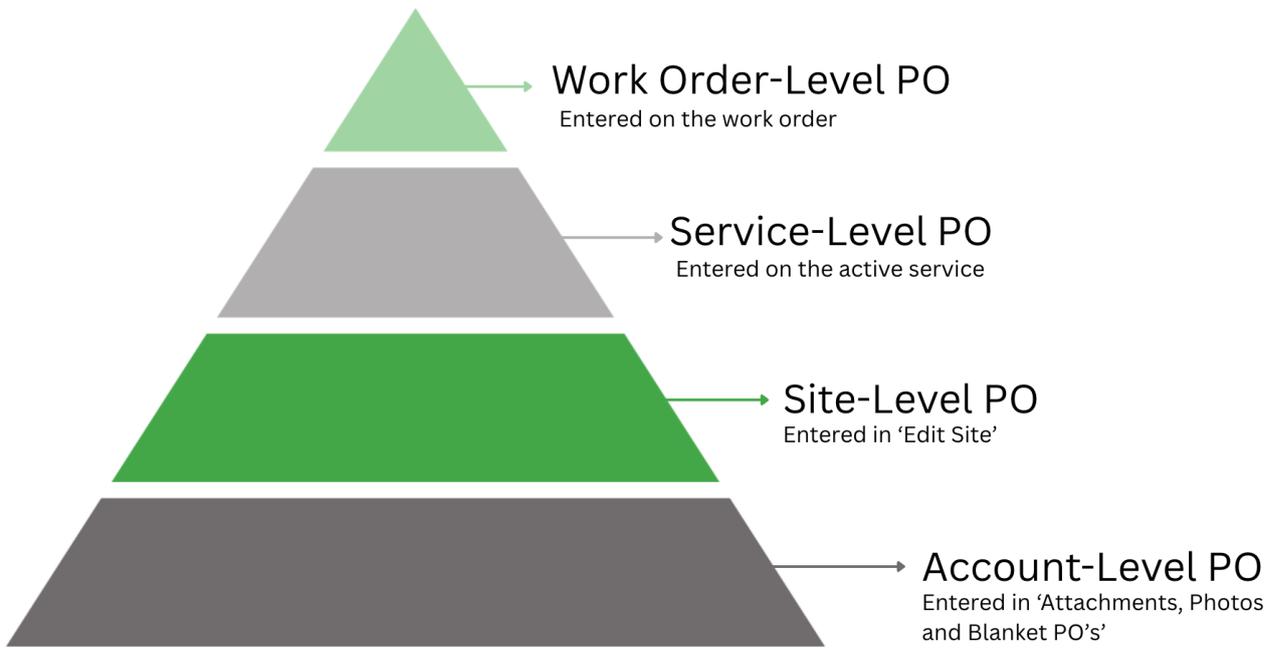
Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
335.02	0.00	0.00	0.00	0.00	335.02

A note at the bottom states: 'Total balance due includes current charges, however it may not reflect recent payments in transit.'

Service-level PO number shown overriding the site-level PO during billing.

Hierarchy of PO Numbers

The location where a PO number is entered determines which PO is applied to the billing transaction when multiple PO numbers exist.



Account- Level PO

Account-level PO numbers are entered as **Blanket Purchase Orders** and can be made available to all sites under the account or limited to specific sites. Blanket POs can be set to expire after a specific period or once a designated fund amount is reached. Blanket purchase orders can be pulled in and used within the service and work order levels, helping to streamline PO management and ensure consistent billing.

Photos, Attachments, Purchase Orders and Waste Profiles

In the account's details, select the paper clip icon to open the *Photos, Attachments, Purchase Orders, and Waste Profiles* screen, which includes a Blanket Purchase Orders tab. From here, blanket purchase orders can be added and managed for the account.

The screenshot displays two account profiles: '49418 Renovation Gym' and '49418003 Total Body Wellness Chiropractic'. The interface includes a navigation menu with 'PHOTOS, ATTACHMENTS, PURCHASE ORDERS AND WASTE PROFILES' selected. The 'Blanket Purchase Orders' tab is active, and the 'ADD BLANKET PURCHASE ORDER' form is open, showing the following fields:

- PO NUMBER:
- ACCOUNT #: 49418
- SITE #:
- AMOUNT:
- START DATE:
- END DATE:
- NOTE:

A 'SAVE' button is located at the bottom of the form. The background shows a calendar view with dates from June 4 to June 19.

Site-Level PO

Site-level PO numbers are added to the Edit Site screen and are only available to the site they are added to.

Edit Site

From the Customer Service screen, right-click within the Site Details section to open the Edit Site window. A PO number can then be added under the Basic Settings tab.

The screenshot shows the 'EDIT SITE' window with the 'Basic Settings' tab selected. The 'PO#' field is highlighted with a red box. The form contains the following fields and values:

Field	Value
NAME	Osceolas Guac N Roll
NAME 2	
ADDRESS LINE 1	444 N Cascade St
ADDRESS LINE 2	
CITY/STATE/POSTAL CODE	Osceola WI 54020
PHONE 1	(999) 999-9999 Office
PHONE 2	(999) 999-9999
OLD ID	
PO#	
SIGNATURE REQUIRED	<input type="checkbox"/>
LEED REPORTABLE	<input type="checkbox"/>
VIP	<input type="checkbox"/>
DIVISION	QAWASTE
SERVICE REGION	QA Waste OPEN MARKET
TAX REGION	
ORIGIN	
SOURCE	Call In
SALES REP	Aliena Somers - Admin-NS (Sales)
SITE CLASS	COM
GENERATOR	Small Quantity Generator
EPA	
STATE ID	
ADDITIONAL SERVICE MINUTES	

Service-Level PO

Service-level PO numbers are added to a specific service a site is receiving. If a valid Blanket Purchase Order exists for the account, it can be linked to the service. Otherwise, a PO number can be entered directly in the available field. **A PO entered here overrides a site-level PO.**

Active Services

From the Active Services section of the Customer Service screen, select the *Service Additional Fields* icon. A PO number can be entered directly, or if a valid Blanket PO exists and applies to future servicing of the selected service, it can be selected and applied.

The screenshot shows the 'ACTIVE SERVICES' screen with the 'SERVICE ADDITIONAL FIELDS' dialog box open. The 'PO NUMBER' field is highlighted with a red box. The dialog box contains the following fields and values:

Field	Value
REASON CODE	Add - New from Referral
PO NUMBER	1234 Test
BLANKET PO	
SERVICE NOTES	
START DATE	06/16/2025
END DATE	
NOTE	This is a service note.

Work Order-Level PO

Work order-level PO numbers can be entered on both On Call Orders and Service Records. Additionally, a PO number or applicable Blanket PO can be assigned to manual charges on the site. **When a PO number is assigned in any of these areas, it overrides both site-level and service-level PO numbers.**

On Call Order

When creating an on-call order, both a PO Number field and a Blanket PO field are available. If the site has a valid Blanket PO that applies to the service, select it from the dropdown. If not, enter the PO number directly in the PO Number field.

CREATE ON CALL ORDER

Site # 49418003
Total Body Wellness Chiropractic
425 Rice St
Saint Paul, MN 55103-2123
PHONE +1 555-555-3327

SCHEDULE DATE: 06/18/25 Wednesday
SERVICE CODE: 4 Yard Trash Service
ORDER TYPE: [Dropdown]
QUANTITY: 1

REQUESTED BY: [Text]
CONTACT: [Dropdown]
REASON CODE: [Dropdown]

ORDER NOTES: [Text] **PREPAYMENT**

PO NUMBER: [Text] **BLANKET PO**: [Dropdown] **EXTERNAL ID**: [Text]

ROUTE: [Dropdown]

CHARGES

Charges must match Equipment
 Charges must match Material

GROSS QTY	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL

CREATE

Edit Service Record

In the Edit Service Record screen, the PO Number field is available to capture a PO number if applicable.

EDIT SERVICE RECORD

Site # 49418003
 Total Body Wellness Chiropractic
 425 Rice St
 Saint Paul, MN 55103-2123
 PHONE +1 555-555-3327
 CREATED BY Aliena Somers - Admin-NS (Sales) on 6/16/25 2:56 pm

WORK ORDER 9821292 QTY 1 SERVICE CODE 4 Yard Trash Service (38973) EQUIPMENT 4YD WORK TYPE FL_EXTRAPU ORDER TYPE On Call MATERIAL MSW

ORDER NOTES

PO NUMBER [Red Box] EXTERNAL ID [Red Box]

SCHEDULED DATE 06/17/25 Tuesday ROUTE [Red Box] SEQUENCE 0 DESTINATION / ORIGIN [Red Box]

WORK STATUS Scheduled EXCEPTION REASON [Red Box] POSTING STATUS Pending

SVC NOTE This is a service note.

Charges \$ 40.24 ¹ Disposal / Ship Payments Completion Lab Tests Attachments Labels Photos

Charges must match Equipment
 Charges must match Material

WO MINIMUM [Red Box] **CALCULATE LAB QTY AND DISCOUNT**

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
1			1	each	Bulk Pickup	\$ 40.2365		None		\$ 40.24

Select Print Format **ADD PAYMENT (F7)** **SAVE (F2)**

Add Manual Charge

When adding a manual charge, the option is available to enter a PO Number in the Add/Edit Manual Charge popup.

TUE Jul 1 WED Jul 2 THU Jul 3

Jul 8 Jul 9 Jul 15 Jul 16 Jul 22 Jul 23 Jul 29 Jul 30

- Add Active Service
- Create On Call Order
- Add Appointment
- Add Note
- Add Task
- Add Manual Charge**
- Add Account Request

ADD/EDIT MANUAL CHARGE

CHARGE CODE [Red Box]
 QUANTITY [Red Box]
 PER UNIT RATE [Red Box]
 AMOUNT [Red Box]

PO NUMBER [Red Box]
 BLANKET PO [Red Box]

DATE 07/01/2025

NOTE [Red Box]

INCLUDE ATTACHMENT WITH INVOICE

Choose a file or drag it here.

SAVE **DELETE**

Blanket Purchase Orders
Blanket Purchase Order Management
