Blanket Orders

Cavallo Support - 2025-11-24 - System

Overview

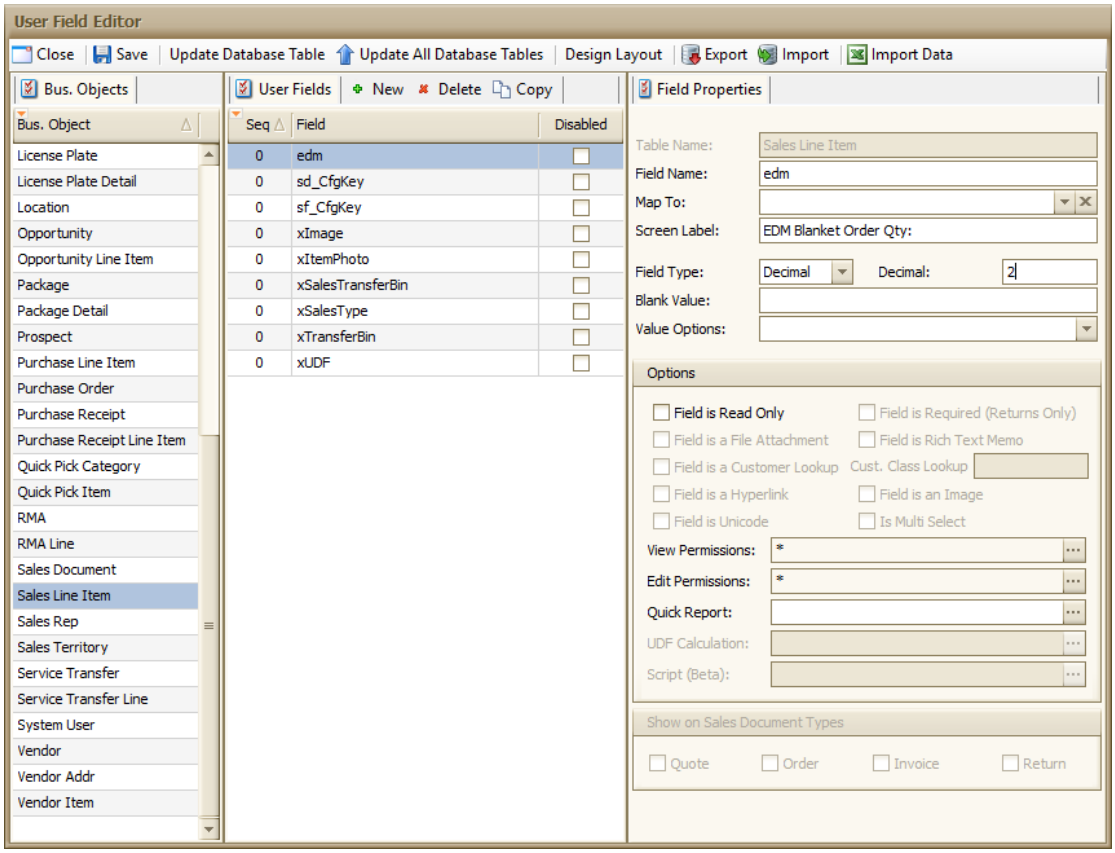
A Blanket Order is an agreement or master quote created for a customer's total anticipated need for an item over a specific period. Instead of being a single, one-time shipment, the blanket order allows the customer to order and receive smaller, specific quantities (called "releases") against the total quantity agreed upon in the master document. SalesPad includes two plugins to add functionality for blanket orders – Blanket Order Release and Blanket Order Invoicing. Blanket Order Release converts a specified quantity of line items on selected quote IDs into orders, which can then have pick tickets printed. Blanket Order Invoicing converts the blanket orders to invoices.

For similar functionality, see: Recurring Sales.

User Defined Field Setup

SalesPad allows you to create a user defined field to keep track of the quantity fulfilled when blanket orders are processed.

Create the following user defined field in the User Field Editor (refer to the SalesPad User Defined Fields document for more information):



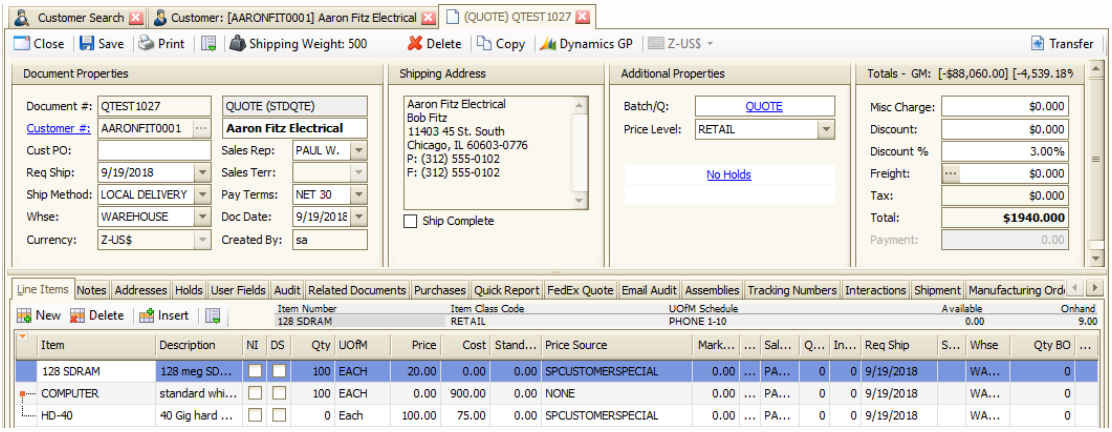
This UDF will need to be of type: Decimal. Once created, Go to Settings in SalesPad and enter the field name into the *Blanket Order Quantity Fulfilled* setting.

Usage

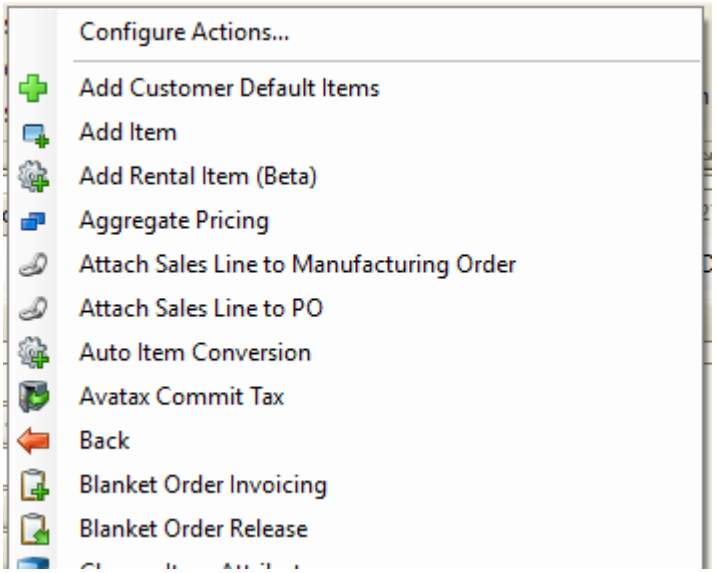
First, create a quote with the total quantity of an item that the customer will want overall. This quote will not go

through the regular transfer process. Inventory will not be reserved for the total quantity.

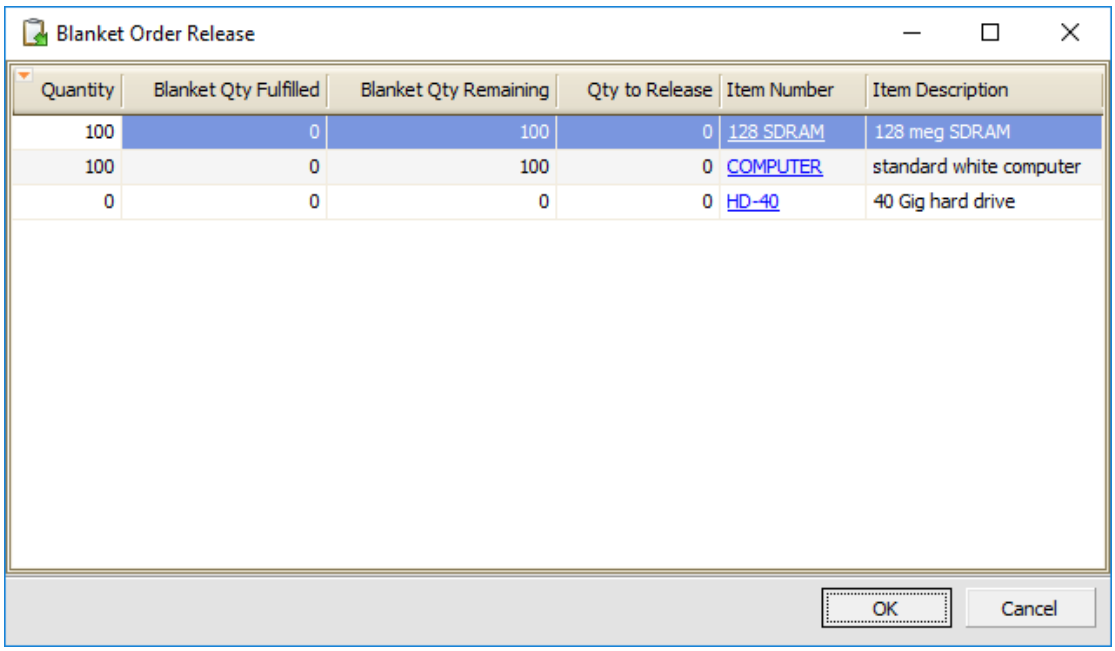
Original Quote:



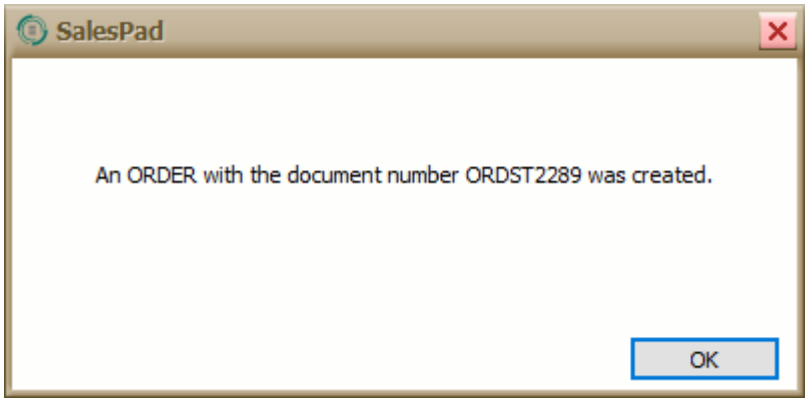
On a sales document header, Blanket Order Invoicing and Blanket Order Release are available from the **Actions** ( ) dropdown:



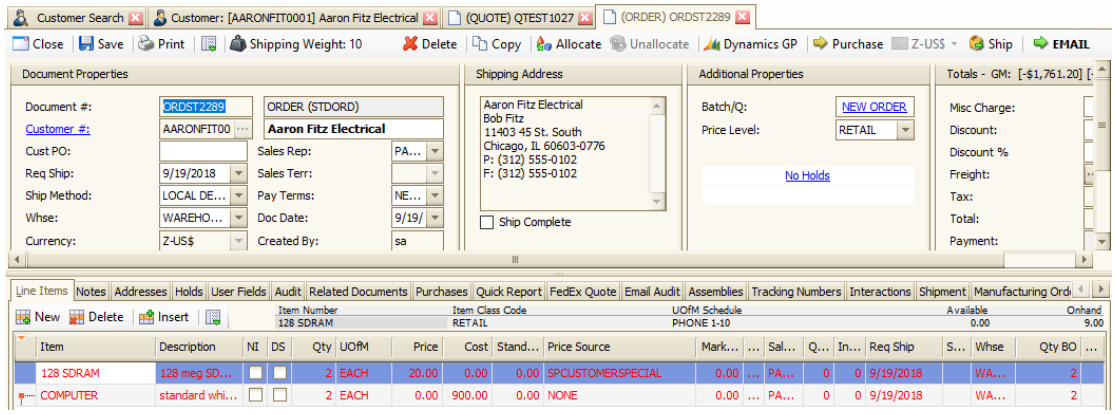
When the customer requests a portion of the order to be delivered, select **Blanket Order Release**. The Blanket Order Release Menu appears:



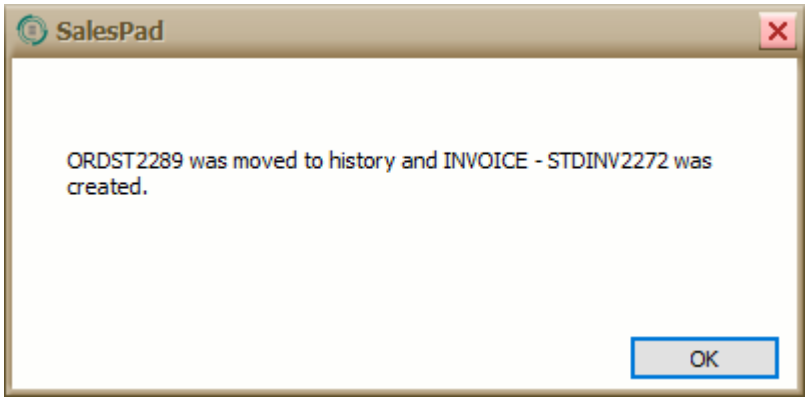
Enter the Qty to Release for each item and click **OK**. A confirmation that the blanket order has been created appears:



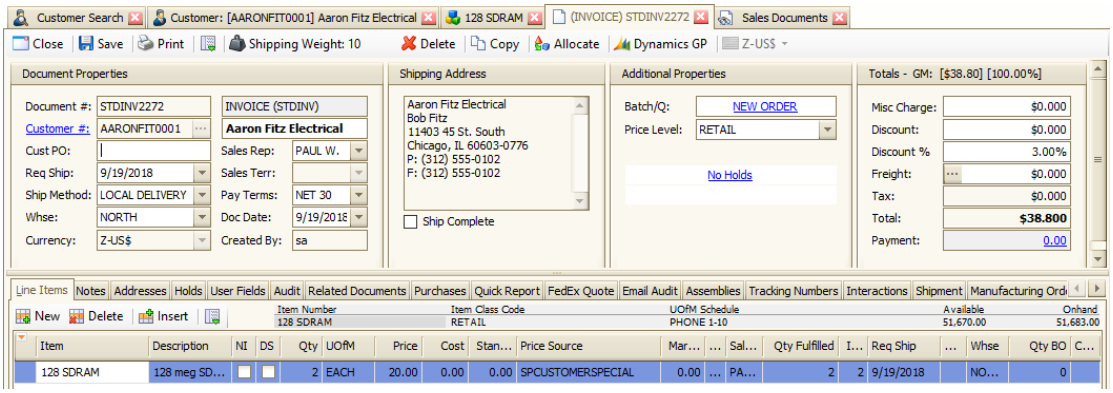
The New Order:



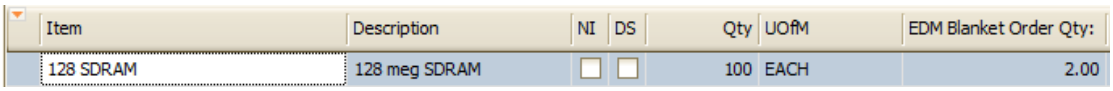
To create an invoice from the Order, Select Blanket Order Invoicing. A confirmation message will appear:



The New Invoice:



If the user field was created and added to the layout, you can see the column (EDM Blanket Order Qty) displays the quantity released:



When the full quantity is consumed, the quote will be moved to history.

Note: The quantity fulfilled user field for each line on the blanket quote is updated as lines on blanket orders are invoiced. Adding the User Field column to the layout of the line item on the quote will serve as an indicator of the quantity currently invoiced (fulfilled) for each line item. Should an invoice be voided, the fulfilled quantity will not be automatically reduced on the quote line, but the user can manually change the fulfilled quantity.

Security and Settings

Security

*Blanket Order Release** - Allows the use of the Blanket Order Release action from the document actions menu.

*Blanket Order Invoicing** - Allows the use of the Blanket Order Invoicing action from the document actions menu.

Settings

Blanket Order Quantity Fulfilled - Sets the user field that will record the quantity fulfilled from the blanket order.

Move Fully Invoiced Quote to History - When enabled, once all lines on the quote have been fully invoiced, the quote will be moved to historical.