



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):

Seq	Field	Disabled
0	edm	<input type="checkbox"/>
0	sd_CfgKey	<input type="checkbox"/>
0	sf_CfgKey	<input type="checkbox"/>
0	xImage	<input type="checkbox"/>
0	xItemPhoto	<input type="checkbox"/>
0	xSalesTransferBin	<input type="checkbox"/>
0	xSalesType	<input type="checkbox"/>
0	xTransferBin	<input type="checkbox"/>
0	xUDF	<input type="checkbox"/>

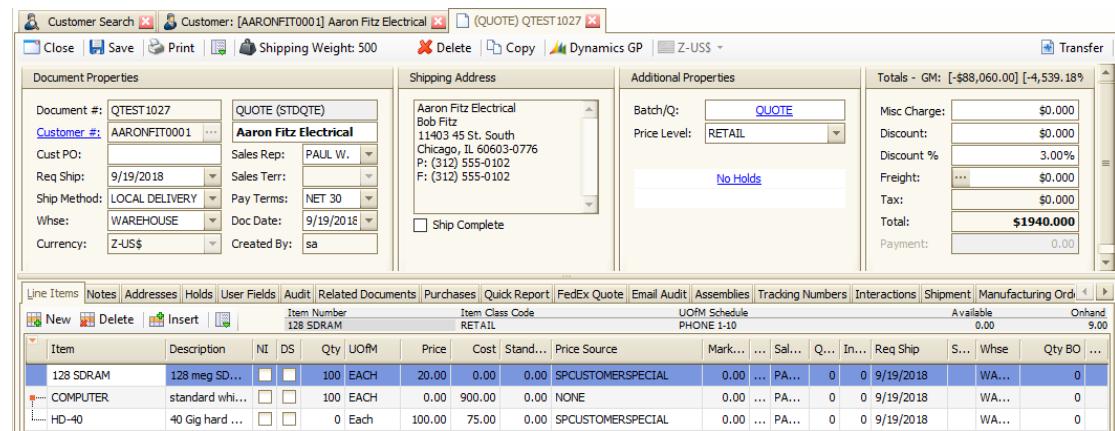
This UDF will need to be of type: Decimal. Once created, Go to Settings in SalesPad and enter the field name into the *Blanket Order Quantity Fulfilled* setting.

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.

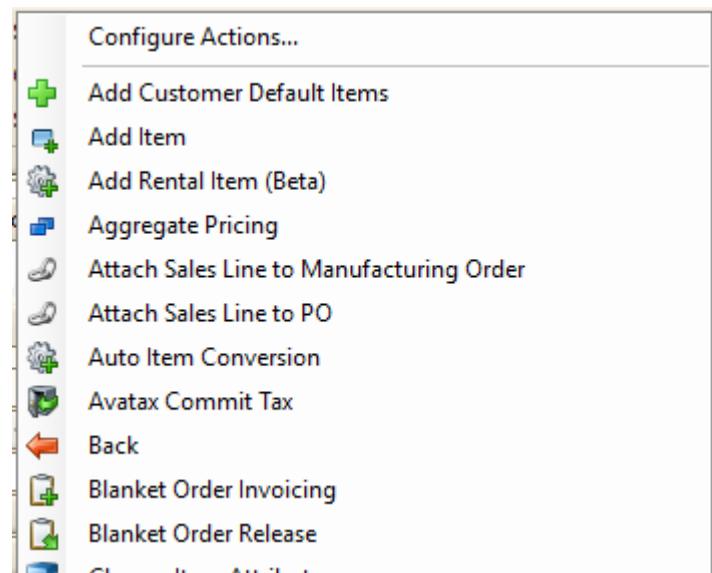
Original Quote:



The screenshot shows the Dynamics GP Sales Quote screen. The Document Properties section includes fields for Document # (QTEST1027), Customer # (AARONFIT0001), Sales Rep (PAUL W.), and Ship Method (LOCAL DELIVERY). The Shipping Address section shows the customer's address: Aaron Fitz Electrical, 11403 45 St. South, Chicago, IL 60603-0776. The Additional Properties section includes a Batch/Q: field set to QUOTE, a Price Level dropdown set to RETAIL, and a Totals section showing a Total of \$1940.00. The Line Items grid shows three items: 128 SDRAM, COMPUTER, and HD-40, with their respective descriptions, quantities, and prices.

Item	Description	NI	DS	Qty	UoM	Price	Cost	Stand...	Price Source	Mark...	...	Sal...	Q...	In...	Req Ship	S...	Whse	Qty BO	...
128 SDRAM	128 meg SD...	<input type="checkbox"/>	<input type="checkbox"/>	100	EACH	20.00	0.00	0.00	SPCUSTOMERSPECIAL	0.00	...	PA...	0	0	9/19/2018	WA...	0	0	
COMPUTER	standard whi...	<input type="checkbox"/>	<input type="checkbox"/>	100	EACH	0.00	900.00	0.00	NONE	0.00	...	PA...	0	0	9/19/2018	WA...	0	0	
HD-40	40 Gig hard ...	<input type="checkbox"/>	<input type="checkbox"/>	0	Each	100.00	75.00	0.00	SPCUSTOMERSPECIAL	0.00	...	PA...	0	0	9/19/2018	WA...	0	0	

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



The screenshot shows the 'Configure Actions...' menu. It includes a list of actions with icons: Add Customer Default Items, Add Item, Add Rental Item (Beta), Aggregate Pricing, Attach Sales Line to Manufacturing Order, Attach Sales Line to PO, Auto Item Conversion, Avatax Commit Tax, Back, Blanket Order Invoicing, and Blanket Order Release. The 'Blanket Order Invoicing' and 'Blanket Order Release' items are highlighted.

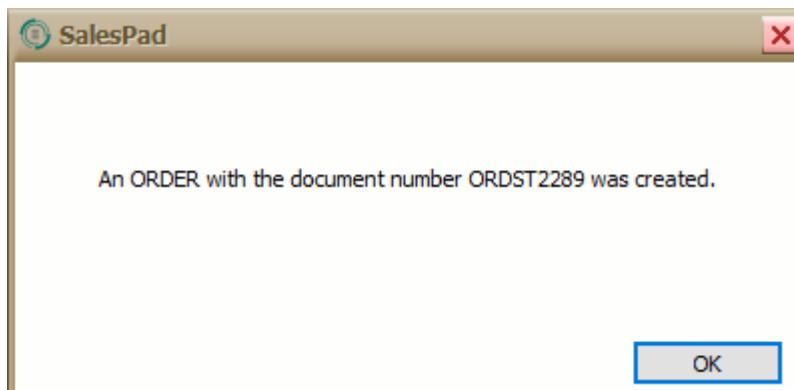
When the customer requests a portion of the order to be delivered, select **Blanket Order Release**. The Blanket Order Release Menu appears:

Blanket Order Release

Quantity	Blanket Qty Fulfilled	Blanket Qty Remaining	Qty to Release	Item Number	Item Description
100	0	100	0	128 SDRAM	128 meg SDRAM
100	0	100	0	COMPUTER	standard white computer
0	0	0	0	HD-40	40 Gig hard drive

OK Cancel

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



The New Order:

SalesPad

Customer Search Customer: [AARONFIT0001] Aaron Fitz Electrical (QUOTE) QTEST1027 (ORDER) ORDST2289

Close Save Print Shipping Weight: 10 Delete Copy Allocate Unallocate Dynamics GP Purchase Z-USS Ship EMAIL

Document Properties

Customer #: ORDST2289 ORDER (STDORD)
Customer #: AARONFIT00 Aaron Fitz Electrical

Shipping Address

Sales Rep: PA...
Sales Terr: NE...
Pay Terms: NE...
Doc Date: 9/19/2018
Created By: sa

Additional Properties

Batch/Q: NEW ORDER
Price Level: RETAIL
No Holds
Ship Complete

Totals - GM: [-\$1,761.20]

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Tracking Numbers Interactions Shipment Manufacturing Order

New Delete Insert Item Number Item Class Code UOM Schedule Available
128 SDRAM RETAIL PHONE 1-10 0.00

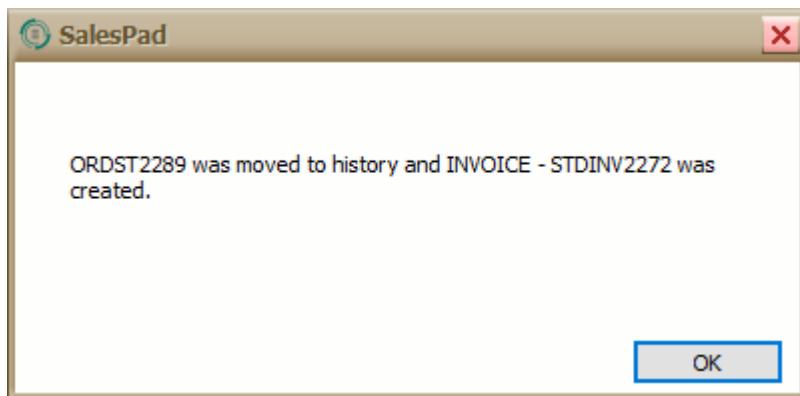
Orchard 9.00

Item Description NI DS Qty UO/FM Price Cost Stand... Price Source Mark... ... Sal... Q... In... Req Ship S... Whse Qty BO...

128 SDRAM 128 meg SD... 2 EACH 20.00 0.00 0.00 SPCUSTOMERSPECIAL 0.00 ... PA... 0 0 9/19/2018 WA... 2

COMPUTER standard whi... 2 EACH 900.00 0.00 NONE 0.00 ... PA... 0 0 9/19/2018 WA... 2

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



The New Invoice:

Item	Description	NI	DS	Qty	UOFM	EDM Blanket Order Qty
128 SDRAM	128 meg SDRAM	1	1	100	EACH	2.00

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

Item	Description	NI	DS	Qty	UOFM	EDM Blanket Order Qty
128 SDRAM	128 meg SDRAM	1	1	100	EACH	2.00

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.