



Blanket Orders

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Overview

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.

User Defined Fields

Your SalesPad version may allow 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):

The screenshot shows the 'User Field Editor' window. The 'User Fields' tab is active, displaying a table of existing fields. The 'Sales Line Item' object is selected in the left-hand pane. The 'Field Properties' pane on the right is configured for a new field named 'edm'.

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"/>

Field Properties:

- Table Name: Sales Line Item
- Field Name: edm
- Map To: [Dropdown]
- Screen Label: EDM Blanket Order Qty:
- Field Type: Decimal (Decimal: 2)
- Blank Value: [Text Box]
- Value Options: [Dropdown]

Options:

- Field is Read Only
- Field is Required (Returns Only)
- Field is a File Attachment
- Field is Rich Text Memo
- Field is a Customer Lookup (Cust. Class Lookup: [Dropdown])
- Field is a Hyperlink
- Field is an Image
- Field is Unicode
- Is Multi Select

Permissions and Reporting:

- View Permissions: *
- Edit Permissions: *
- Quick Report: [Dropdown]
- UDF Calculation: [Dropdown]
- Script (Beta): [Dropdown]

Show on Sales Document Types:

- Quote
- Order
- Invoice
- Return

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:

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

Close Save Print Shipping Weight: 500 Delete Copy Dynamics GP Z-US\$ Transfer

Document Properties: Document #: QTEST1027, Customer #: AARONFIT0001, Aaron Fitz Electrical, Cust PO: , Req Ship: 9/19/2018, Ship Method: LOCAL DELIVERY, Whse: WAREHOUSE, Currency: Z-US\$, QUOTE (STDQTE), Sales Rep: PAUL W., Sales Terr: , Pay Terms: NET 30, Doc Date: 9/19/2018, Created By: sa


Shipping Address: Aaron Fitz Electrical, Bob Fitz, 11403 45 St. South, Chicago, IL 60603-0776, P: (312) 555-0102, F: (312) 555-0102, Ship Complete

Additional Properties: Batch/Q: QUOTE, Price Level: RETAIL, No Holds

Totals - GM: [-\$88,060.00] [-4,539.18%]

Misc Charge: \$0.00, Discount: \$0.00, Discount %: 3.00%, Freight: \$0.00, Tax: \$0.00, Total: \$1940.000, Payment: 0.00

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
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
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

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

- Configure Actions...
- 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
- Blanket Order Release

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

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

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

An ORDER with the document number ORDST2289 was created.

The New Order:

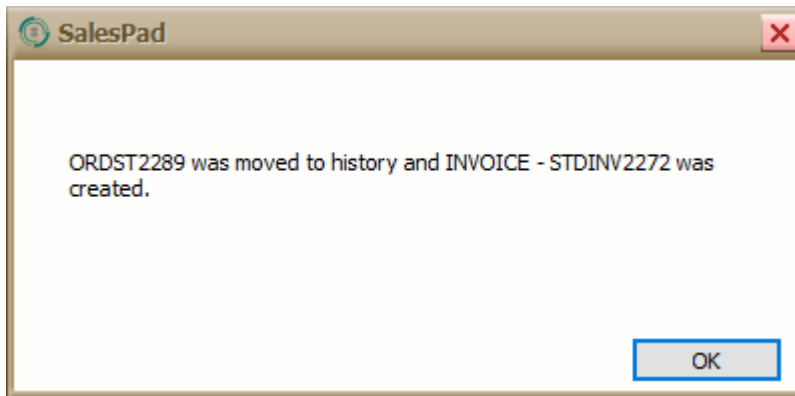
Customer Search | Customer: [AARONFIT001] Aaron Fitz Electrical | (QUOTE) QTEST1027 | (ORDER) ORDST2289

Close | Save | Print | Shipping Weight: 10 | Delete | Copy | Allocate | Unallocate | Dynamics GP | Purchase | Z-US\$ | Ship | EMAIL

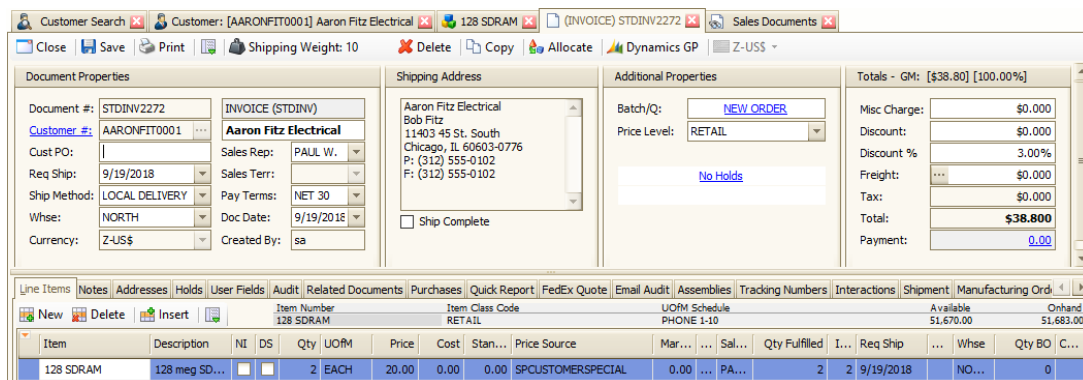
Document Properties Document #: <u>ORDST2289</u> ORDER (STDORD) Customer #: AARONFIT001 Aaron Fitz Electrical Cust PO: Sales Rep: PA... Req Ship: 9/19/2018 Sales Terr: Ship Method: LOCAL DE... Pay Terms: NE... Whse: WAREHO... Doc Date: 9/19/ Currency: Z-US\$ Created By: sa		Shipping Address Aaron Fitz Electrical Bob Fitz 11403 45 St. South Chicago, IL 60603-0776 P: (312) 555-0102 F: (312) 555-0102 <input type="checkbox"/> Ship Complete	Additional Properties Batch/Q: <u>NEW ORDER</u> Price Level: RETAIL No Holds	Totals - GM: [-\$1,761.20] Misc Charge: Discount: Discount % Freight: Tax: Total: Payment:
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Item	Description	NI	DS	Qty	UORM	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"/>	2	EACH	20.00	0.00	0.00	SPCUSTOMERSPECIAL	0.00	PA...	0	0	9/19/2018	WA...		2
COMPUTER	standard whi...	<input type="checkbox"/>	<input type="checkbox"/>	2	EACH	0.00	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:



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	<input type="checkbox"/>	<input type="checkbox"/>	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.