



Blanket Orders

Megan De Freitas - 2024-11-22 - System

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):




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.