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# 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):

The screenshot shows the 'User Field Editor' window. On the left, a list of business objects is shown, with 'Sales Line Item' selected. The main area displays a table of user fields for 'Sales Line Item'. The table has columns for 'Seq', 'Field', and 'Disabled'. A new field named 'edm' is being added at sequence 0. The 'Field Properties' panel on the right shows the following settings:

- Table Name: Sales Line Item
- Field Name: edm
- Map To: (empty)
- Screen Label: EDM Blanket Order Qty:
- Field Type: Decimal (with a dropdown arrow)
- Decimal: 2
- Blank Value: (empty)
- Value Options: (empty)

Below the field properties, there are 'Options' for the field:

- ☐ 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 (empty)
- ☐ Field is a Hyperlink
- ☐ Field is an Image
- ☐ Field is Unicode
- ☐ Is Multi Select

Permissions and other settings are also visible:

- View Permissions: \*
- Edit Permissions: \*
- Quick Report: (empty)
- UDF Calculation: (empty)
- Script (Beta): (empty)

At the bottom, there is a section 'Show on Sales Document Types' with checkboxes for Quote, Order, Invoice, and Return.

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:

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 QUOTE (STDQTE)

Customer #: AARONFIT0001 Aaron Fitz Electrical

Cust PO: Sales Rep: PAUL W.

Req Ship: 9/19/2018 Sales Terr:

Ship Method: LOCAL DELIVERY Pay Terms: NET 30

Whse: WAREHOUSE Doc Date: 9/19/2018

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

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

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 128 SDRAM Item Class Code RETAIL UORM Schedule PHONE 1-10 Available 0.00 Onhand 9.00

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...			100	EACH	20.00	0.00	0.00	SPCUSTOMERSPECIAL	0.00	PA...	0	0	9/19/2018		WA...	0
COMPUTER	standard whi...			100	EACH	0.00	900.00	0.00	NONE	0.00	PA...	0	0	9/19/2018		WA...	0
HD-40	40 Gig hard ...			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: [AARONFIT001] Aaron Fitz Electrical (QUOTE) QTEST1027 (ORDER) ORDST2289

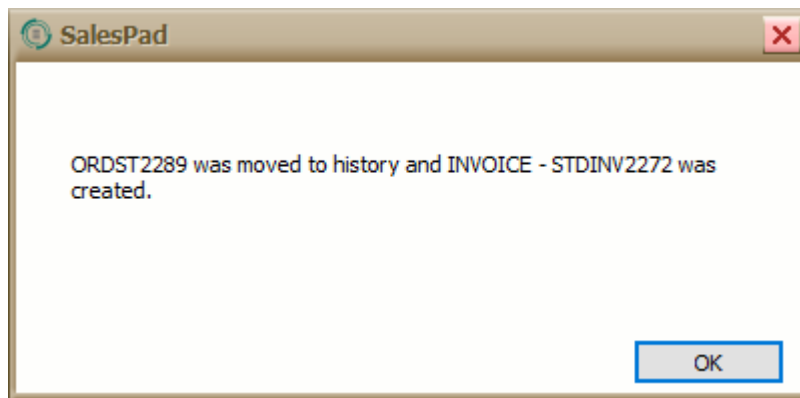
Close Save Print Shipping Weight: 10 Delete Copy Allocate Unallocate Dynamics GP Purchase Z-US\$ Ship EMAIL

Document Properties				Shipping Address		Additional Properties		Totals - GM: [-\$1,761.20]	
Document #:	ORDST2289	ORDER (STDORD)		Aaron Fitz Electrical Bob Fitz 11403 45 St. South Chicago, IL 60603-0776 P: (312) 555-0102 F: (312) 555-0102		Batch/Q:	NEW ORDER	Misc Charge:	
Customer #:	AARONFIT00	Aaron Fitz Electrical				Price Level:	RETAIL	Discount:	
Cust PO:						No Holds		Discount %:	
Req Ship:	9/19/2018	Sales Rep:	PA...					Freight:	
Ship Method:	LOCAL DE...	Pay Terms:	NE...					Tax:	
Whse:	WAREHO...	Doc Date:	9/19/					Total:	
Currency:	Z-US\$	Created By:	sa					Payment:	

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

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...			2	EACH	20.00	0.00	0.00	SPCUSTOMERSPECIAL	0.00	PA...	0	0	9/19/2018	WA...		2
COMPUTER	standard whi...			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:

Document Properties		Shipping Address	Additional Properties	Totals - GM: [\$38.80] [100.00%]
Document #:	STDINV2272	Aaron Fitz Electrical Bob Fitz 11403 45 St. South Chicago, IL 60603-0776 P: (312) 555-0102 F: (312) 555-0102	Batch/Q: <a href="#">NEW ORDER</a> Price Level: RETAIL	Misc Charge: \$0.000
Customer #:	AARONFIT0001			Discount: \$0.000
Cust PO:				Discount %: 3.00%
Req Ship:	9/19/2018			Freight: \$0.000
Ship Method:	LOCAL DELIVERY			Tax: \$0.000
Whse:	NORTH			Total: <b>\$38.800</b>
Currency:	Z-US\$			Payment: <b>0.00</b>
Sales Rep:	PAUL W.			
Sales Terr:				
Pay Terms:	NET 30			
Doc Date:	9/19/2018			
Created By:	sa			

Line	Item	Description	NI	DS	Qty	UoM	Price	Cost	Stan...	Price Source	Mar...	Sal...	Qty Fulfilled	I...	Req Ship	Whse	Qty BO	C...
128	SDRAM	128 meg SDRAM			2	EACH	20.00	0.00	0.00	SPCUSTOMERSPECIAL	0.00	PA...	2	2	9/19/2018	NO...	0	

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	UoM	EDM Blanket Order Qty:
128 SDRAM	128 meg SDRAM			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.