



Blanket PO from Customer - Sales Orders

SOP 115

Revision H, 02/14/2020

Approved by: Don Stanton

PURPOSE:

Blanket sales orders represent a framework for a long-term agreement between a company and its customers and are typically used in situations where a customer has committed to purchasing **large quantities** that are to be delivered in several smaller shipments over a certain period of time.(i.e., *Spears*,...)

In DEACOM, blanket sales orders are setup using the “**Pricing Order – Bill-To**” or “**Pricing Order – Ship-To**” order types since the concepts and features used in these order types match those of the blanket sales agreements.

PROCESS STEPS:

AR – Tulco pre-requisite process:

1. Navigate to **Sales > Bill-To / Ship-To Management**
2. Enter the Bill-To Company
3. Click Modify Bill-To soft button



4. On the User Fields tab, change Blanket PO to “No”

Bill-To / Ship-To Management		Edit Bill-To Company
Save	Previous	Next
Undo	View Docs	Add Ship-To
Layout (User)	Send Email	Sales History
Write Letter	Cash Receipts	Sync Contacts
Receivables	View Contacts	Customer Parts
View Contacts	Copy Bill To	A/R Ledger
Authorized Buyers	Restricted Selling	Sales Assignment
Ship-To Companies		
Bill-To Created Date	07/26/2010	Ta
D&B Rating		XIV
Blanket PO	No	

5. Click Save

CSR/Sales process:

1. Navigate to **Sales > New Sales Order**

deacom	File	Tools	Sales	Purchasing	Inventory	Production	Accounting	CRM	Print Outs	System
Favorites			New Sales Order							
			Sales Order Management							
			Sales Calendar							
			Recurring Sales Orders							
			Ship Sales Orders							
			Receive In-Transit Orders							
			Available To Ship							
			Order Re-pricing							
			Calculate Commissions and Rebates							
			Block Order Allocation							
			Forecast Management							
			Bill-To / Ship-To Management							
			Progress Billing Management							
			Sales Maintenance							



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2. On the General tab:
 - a. Select appropriate Bill-To and Ship-To Companies by clicking on the magnifying glass.
Note: The default Ship-To Company and other header fields will be auto-populated by selecting a Bill-To Company, or over-ridden by the user.
 - b. Enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO if that information is provided
Note: Do Not Use "VERBAL..." or generic terms in PO fields. Use Full Names if no specific Purchase Order Number has been provided.
Note: Header Notes are a memo field used to store notes regarding the **order** and are printed on all sales documents.
 - c. Change the Order Type to "Pricing Order"
 - i. If it is for a bill to, change to "Pricing Order – Bill-To"
 - ii. If it is for a ship to, change to "Pricing Order – Ship-To"
3. On the Misc₁ tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
4. Click the Dates tab and fill in the applicable date fields:
 - a. Enter the **Wanted** Date
 - b. The **Due to ship** date will calculate based on the delivery lead time.
Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
5. Click the Add button to begin adding parts to the sales order. The "Edit Sales Order Line" window will open.
 - a. In the Cust. Part Number box, click on the magnifying glass to search for the part.
 - b. Use the Part Number field if the desired part is not listed under Cust. Part Number. If you do not know the product number, Click Contains button and type description in "Search all columns..." bar
Note: See SOP 114_ Customer Part Cross Reference to set pricing for specific products for the Bill-To Customer,
or directly from the Edit Sales Order Line window:
 - i. In the Part Number line, click on the magnifying glass to search for the part.
 - ii. Double-click the desired part to choose, it will close the "select a Part Number" window.
 - iii. Return to the Cust. Part Number selection by clicking on the magnifying glass, and press the Add New button.
 - iv. In the "Bill-To / Ship-To Part Information" window, complete:
 1. Use the search box in the Bill-To Company field to select the appropriate Customer
 2. If applicable, enter a Ship-To Company.
 3. Change Cust. Part Number to match the customer's number (if applicable)
 4. Enter Sales Price by stock pricing unit (i.e., Gallons, Pounds, Each, Tubes, & Case)
 5. Confirm the Sales Unit is the "container unit"
 6. Click 'Save' and close
 7. Double-click the newly added Cust.Part Number
- c. Enter the Quantity "1", press tab
- d. Confirm the Unit Price shown is "0.00".(see Note below)
Note: If a price came over from Customer Part Cross Reference(Override Pricing), this will need to be change to \$0.00 to use this Blanket PO price.
 - i. Return to the Cust. Part Number selection by clicking on the magnifying glass
 - ii. Highlight the desired Cust Part, click Modify
 - iii. In the "Bill-To/Ship-To Part Information" window:
 1. Change Sales Price to 0.00, press tab



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2. Click Save, and exit the "Bill-To/Ship-To Part Information" screen
3. Double-click the newly edited Cust.Part Number
- e. Enter the Quantity "1", press tab
- f. Change Unit Price to the correct Customer PO price.
- g. Enter the **Blanket Quantity** as the total amount of Product ordered on the Customer PO.
Note: In the line item Pricing tab the Pricing Method will change to "Manual" (NOT List Price)
- h. Click Save, and exit the "Edit Sales Order Line" window
6. Return to the General Tab
7. Click Save – this will generate an Order number in the Order Number field

Notes:

- The blanket quantity will appear on all applicable sales orders. This line will not print on any confirmations, quotes or invoices.
- The "Blanket Purchases" Report Type can be used to provide information regarding all Pricing Orders with blanket quantities, including the remaining amounts available to be sold. This report is available via Sales > Sales Order Management...Change Report Type to "Blanket Orders".
- All Pricing sales orders can be viewed and edited by navigating to Sales > Sales Order Management and clicking on the 'View' magnifying glass with order type set to "Pricing Order" and order status set to 'all orders' or 'not shipped.'

REVISIONS

Rev	Date	Change
I/R	01/10/18	New
A	5/1/18	Edit Button names and clear up steps, Dates tab needs
B	5/10/18	Change steps to unify with other SOPs
C	8/30/18	Note for no more "verbal..." PO#'s
D	9/6/18	Changed name of SOP, & tasks to clarify Customer Blanket PO quantity/price
E	10/9/18	Highlight Cust Part # change to \$0.00
F	10/24/18	Revise notes to clarify
G	12/18/18	Change CPXR steps
H	2/14/20	Change Bill-To User Field to "No"