

How to process a Call Off/Blanket order

Some customers send in an order which they do not want delivered until they ask for it either as the full quantity or as a call off order. Instead of processing a new Sales Order as usual we would add a new Blanket Sales Order.

Open Blanket Sales Order list view.

Click 'New' to create a new order which will start with the letters BSO and the next consecutive number.

Complete fields with information from the order making sure there is an External Document No.

The Location Code should be a HOLD depot (e.g. HOLDAYR or HOLDKGV etc) so make sure this is the case.

Ensure the PO attaches to the BSO.

Archive the order.

The order is now set up for the customer to call off when required.

When the customer decides they want to call off part of the order they don't always say that it's from a call off.
The majority of call off orders are for bulk de-icing salt.

Click on the appropriate BSO and click 'Edit'.

Fill in the field 'Quantity to Ship' in the lines with the amount requested.

On the top task bar click 'Make Order'. This will create a new Sales Order.

The new Sales order generated will show the correct tonnage and the quantity in the BSO will automatically

Any attachments should pull through to the new order.

Amend the Location code to the appropriate depot.

Check price is the current price as per CRM.

****This procedure is still under review to ensure it is working properly. Please flag up any issues you notice v**