

Create a Purchase Order from a Ticket-Parts

Last Modified on 10/08/2025 4:11 pm EDT

To be able to create a Purchase Order for Parts, from a Service Ticket, at least one part must be listed on the "Equipment and Parts" form of the Service Ticket, and the part for which you want to create a Purchase Order must have the "Stock" checkbox cleared.

Ticket #27611

Central Station

Service Ticket Additional Info Appointments and Labor Billing Documents **Equipment and Parts** Journal Notes Other Items Purchase Orders Service History OPT Web Services Ticket Log Ticket Group

COGS Account: 521000

Go To Notifications

Customer 16158 Taylor, Lilly
Site Lilly Taylor
22 North Lane
Novi, MI 48375
Eastern Time

Created 12/19/2022 3:04 PM
Created By Administrator
Status Open

Contact
Phone
Ext
Notify

Customer Equipment Detail					Installed				Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Serial-Lot	Date	Remove

Service Ticket Parts											
Stock	Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Est Tax	Exempt	Costing	Serial-Lot
<input checked="" type="checkbox"/>		5893RKT	5893RKT WIRELES...		1	636.7300	636.73	47.75	<input type="checkbox"/>	Standard	

New Save

Follow the instructions on the following pages to create a Purchase Order within a Service Ticket record.

1. Navigate to the Purchase Orders form of the Service Ticket. Click on the Purchase Order tab at the top of the form.

Ticket #27611

Purchase Ord...

Service Ticket, Service Additional Info, Appointments and Labor, Billing, Documents, Equipment and Parts, Journal, Notes, Other Items, **Purchase Orders (0)**, Service History, Ticket Log, Ticket Group, OPT Web Services

Go To

Customer: 16158 Taylor, Lilly
 Site: Lilly Taylor, 22 North Lane, Novi, MI 48375, Eastern Time
 Created: 12/19/2022 3:04 PM
 Created By: Administrator
 Status: Open
 Contact: [Dropdown]
 Phone: [Text] Ext: [Text]
 Notify: [Text] [Email Icon]

PO #	Vendor	Amount	Ordered	Due	Back Ordered
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2. A new button, "Create Purchase Order" is displayed at the top of the form; click this button.

Purchase Ord...

Ticket, Central Station, Purchase Order

Create Purchase Order
 Create Purchase Order

Customer: 16158 Taylor, Lilly
 Site: Lilly Taylor, 22 North Lane, Novi, MI 48375, Eastern Time
 Created: 12/19/2022 3:04 PM
 Created By: Administrator
 Status: Open
 Contact: [Dropdown]
 Phone: [Text]
 Notify: [Text]

PO #	Vendor	Amount	Ordered
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3. If only one part is marked for ordering on the the Equipment and Parts form or if there are multiple parts to be ordered and all parts are assigned to the same Primary Vendor, then the new Purchase Order form will open and fill in the majority of information on the PO form. Complete filling in the data entry fields, and then click the Save button when finished.

New Purchase Order

Vendor: Category: ☐ Print Now ☐ Direct Expense ☐ Acknowledged

Purchase Order

Vendor Address: Tri-Ed
P.O. Box 402433
Mail Drop 23567
Atlanta, GA 30384
(800) 366-4472

Ship To: SedonaSecurity
555 Albert Road
Plymouth, MI 48170-1721

PO #: 3766 Branch: MI
Tracking #: Ordered: 12/19/2022
Ship: Warehouse: *MI-Main
Parts Due: Ticket: 27611
Created By: Ship Method:
Last Updated:

Parts \$282.99 Expenses Documents

No Special Order Parts Allowed ☐ Select From All Parts

Part	Description	Vendor Part	Vendor Desc	Pkg Quantity	Unit_Of_Measure_Code	Quantity	Cost	A
5893RKT	5893RKT WIRE...	5893RKT	5893RKT WIRE...	1	EA	1	282.9900	2

Memo:

Total: \$282.99
Received:

☐ Closed

If there are multiple parts to be ordered with different Primary Vendors, then the "Select Vendors to Create PO's for" form opens. Each unique Primary Vendor is listed along with a Vendor labeled "Other".

If you select the vendor "Other", all parts from all Primary Vendors are loaded onto one PO. When selecting this Vendor option, the application assumes you want to order all parts from a vendor that is not linked to the parts.

Select the desired vendor by selecting the checkbox to the left of that vendor.

Select Vendors to Create PO's for

Select	Vendor	Company
<input checked="" type="checkbox"/>	Bosch Security Systems Inc.	Bosch Security Systems Inc.
<input type="checkbox"/>	Communication Connection	Communication Connection
<input type="checkbox"/>	Other	Other