

Create a Purchase Order from a Ticket-Parts

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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 de-selected.

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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.

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2. A new button, "Create Purchase Order" will be displayed at the top of the form; click on this button.

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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 on the Save button when finished.

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

If you select the vendor "Other", all parts from all Primary Vendors will be 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 checking the box to the left of that Vendor.

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