

Create a Purchase Order from a Ticket-Service Provider

Last Modified on 10/08/2025 4:23 pm EDT

In SedonaOffice, the term "Service Provider" refers to a Vendor your company has contracted to perform service calls or inspections on behalf of your company - this is commonly referred to as a Subcontractor. When a vendor record is created, and the Vendor Type selected is Service Provider, once the vendor record is saved, a record is also entered into the Service Company setup table. If the vendor type of Service Provider is not selected, but should have been, you will not be able to assign tickets to the vendor or schedule them for service or inspection appointments.

A Service or Inspection Ticket can be delegated to a Service Provider by manually changing the default service company on the ticket. It is highly recommended to create a purchase order for the services being provided by the Service Provider to ensure the Purchase Order has been received prior to closing the ticket. It will also ensure costs are directed to the appropriate tickets.

The SedonaOffice application will not allow a ticket to be closed if open purchase orders exist for the ticket.

Follow the instructions below to create a purchase order for a Service Provider on a Ticket.

The screenshot shows the 'Vendor Newington Electric Co. Edit' window. The 'Vendor Code' is 'Newington Electric Co.' and the 'Category' is 'S-Svc T&M'. The 'Vendor Type' dropdown is highlighted with a red circle and a blue arrow pointing to it, showing 'Service Provider' selected. The 'Branch' is 'OH'. The 'Open Bills', 'Open Credit', and 'Net Due to Vendor' are all '0.00'. The form includes tabs for Vendor, Bills, Credits, Payments, PO's, Receipts, Returns, GL Journal, GL Accounts, Parts, Custom Fields, and Notes. The 'Vendor Information' section includes Name, Address, Contact 1, and Contact 2. The 'Identification' section includes Federal Id, Social Sec #, and Issue 1099. The 'Payables' section includes Exp Account, Default Cost, Terms, and Credit Limit. The 'Payments' section includes Checks Payable To and Address. The 'Notes' section is empty. At the bottom, there are checkboxes for 'Inactive' and 'Secure Vendor', and 'Save' and 'Close' buttons.

Service Companies

Service Companies

Code	Description	Ticket Form	Inact...	Insp Form	Vendor
A&S Electronics	A&S Electronics	Standard	N	N	A&S Electronics
MI-INSP Cont	SedonaSecurity	Standard	N	N	
MI-INSP T&M	SedonaSecurity	Standard	N	N	
MI-SVC Cont	SedonaSecurity	Standard	N	N	
MI-T&M	SedonaSecurity	Standard	N	N	
Newington Electric Co.	Newington Electric Co.	Standard	N	N	Newington Electri
OH-INSP Cont	SedonaSecurity	Standard	N	N	
OH-INSP R&M	SedonaSecurity	Standard	N	N	
OH-SVC Cont	SedonaSecurity	Standard	N	N	
OH-T&M	SedonaSecurity	Standard	N	N	

Include inactive
 Include vendors

General Inactive

Code: Newington Electric Co. Description: Newington Electric Co.

Company Detail | Labor Setup

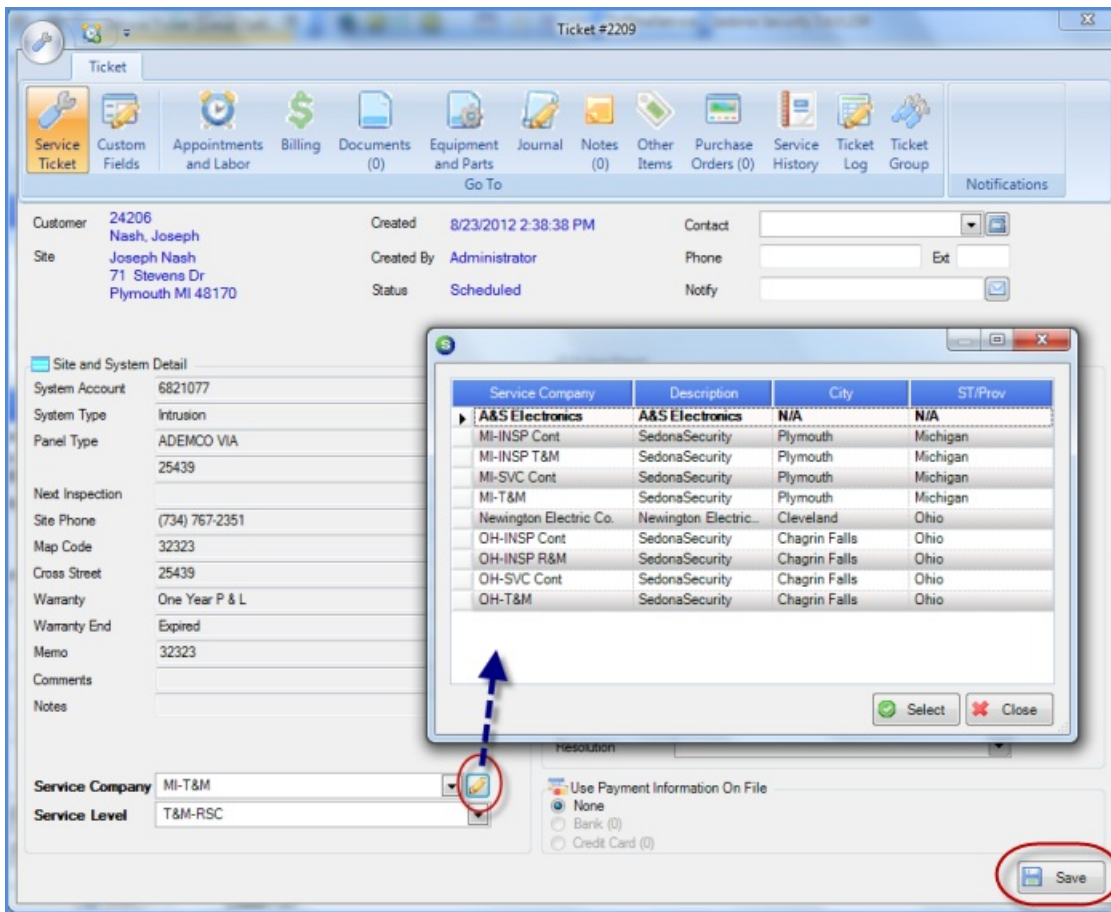
Ticket Form: Standard
 Does NOT use service ticket form for inspections.
 Vendor: Newington Electric Co.
 Warehouse: Main-MI
 Email:

Category: S-Svc T&M
 COGS Acct: 520004
 Expense Inventory on Service Tickets
 When Invoiced
 Primary
 Secondary

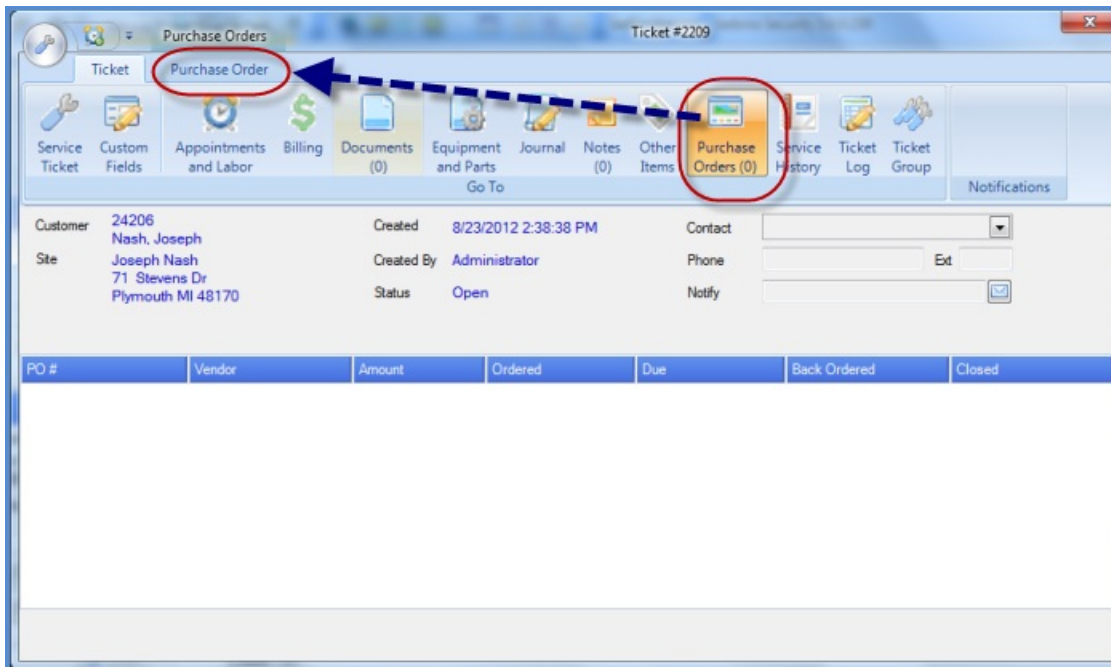
Critical Message
 Expires On:

Apply New Delete

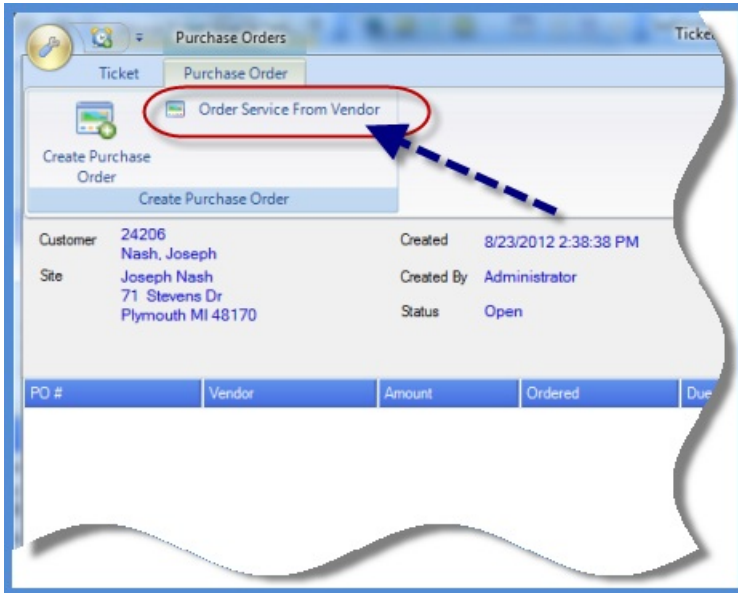
1. Navigate to SedonaSchedule and open the ticket that you will be creating a PO for a Service Provider.
2. If the Service Provider has not already been selected for the ticket, make that selection now and save.



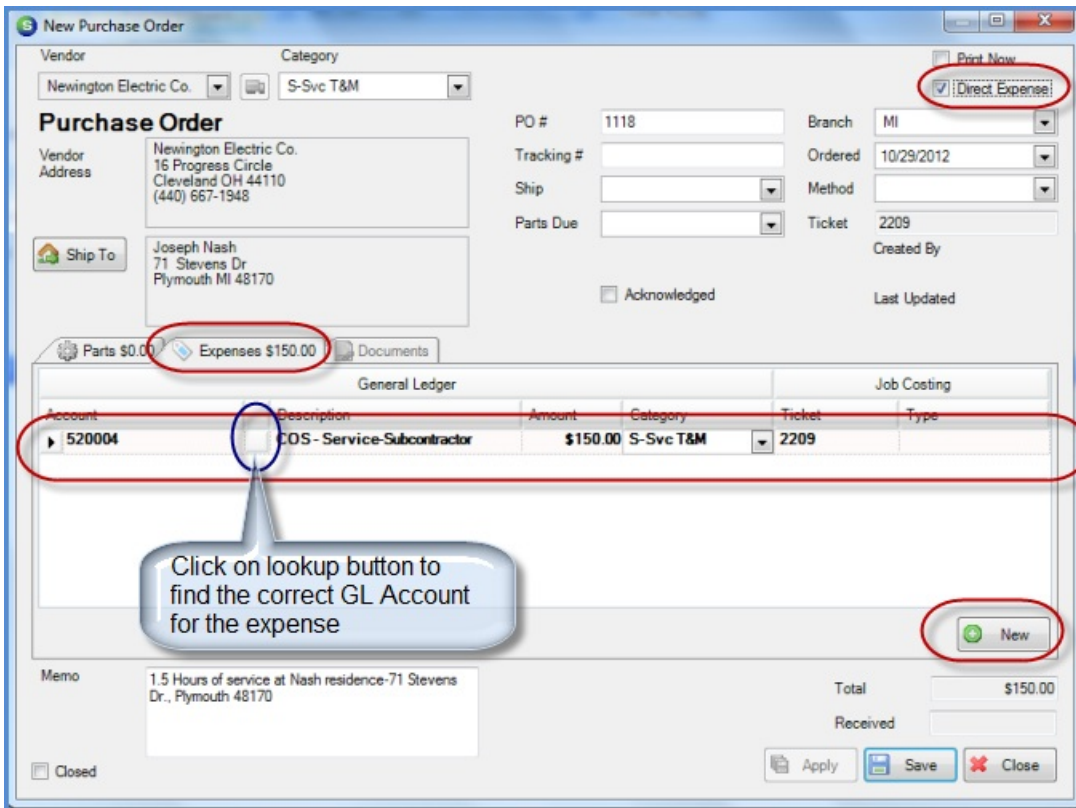
3. Navigate to the Purchase Orders button on the ribbon. Click on the Purchase Order tab.



4. A new menu ribbon will be displayed. Click on the option "Order Service From Vendor".



5. The Purchase Order form will open and assign the PO to the Service Provider selected on the front page of the service or inspection ticket.
6. Navigate to the Expenses tab in the body of the PO. Either type in or lookup the GL Account to be used for the expense. Make certain to check the Direct Expense checkbox at the upper right of the PO.



7. In the Memo field you may type in details of the service to be provided by the Vendor.
8. When finished, click on the "Save" button located at the lower right of the form.

