

Create a Purchase Order from a Ticket-Service Provider

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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 will also be 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 may 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.

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- 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.
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- 3. Navigate to the Purchase Orders button on the ribbon. Click on the Purchase Order tab.
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- 4. A new menu ribbon will be displayed. Click on the option "Order Service From Vendor".
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- 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.
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- 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.