

# Order Parts for a Job

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SedonaOffice provides an automated process of ordering parts for Jobs. Parts are selected and added to the Materials form of each Job requiring parts. Each part added is linked to a Primary Vendor. The automated ordering process will auto-fill a suggested PO with all the parts on the Material List that are linked to the Primary Vendor. Prior to generating Purchase Orders, Users should first issue parts from stock that are available.

Follow the steps below to create a Purchase Order for Parts from a Job record.

1. Open the Job record from the Job Queue.
2. Once the Job record is displayed, click the Tools button on the Job toolbar, then click the Purchase Orders button on the Tools Toolbar.
3. To create a Purchase Order, position the mouse in the white area of the Purchase Orders form, right-click then select the Create Part PO option.

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If there are multiple Phase Codes assigned to the parts on the Materials list, the Select Phase for Part Selection form will be displayed where you will check the box of the Phase for which you are ordering.

If only one Phase Code is used on all part lines, and there are multiple Primary Vendors associated with the parts entered on the Materials List, the Select Vendors to Create PO's for form will be displayed. You will select one Vendor at a time from the Primary Vendor list to create a Purchase Order. Check the box to the left of the Vendor then click the Save button located at the lower right of the selection form.

If there is only one Primary Vendor for all of the Parts, the Purchase Order form will open and be assigned to the Primary Vendor.

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4. Once a Vendor is selected, the New Purchase Order form will open filled in with all the parts on the Materials List for the Primary Vendor selected where the Stock checkbox is not selected. If all parts on the Materials List have the same Primary Vendor, the New Purchase Order form will open filled in with the parts. Fill in the header area of the Purchase Order according to your company policy and procedures.

## Ship To Address

When the Direct Expense checkbox is selected on the PO, the Ship To address will default to the address of the Branch for the Job. If the Direct Expense checkbox is not selected, you will select the Warehouse to which the parts will ship and the Ship To address will default to the address on the Warehouse setup.

To the left of the Ship To field are two buttons; Edit and Drop Ship.

- Clicking on the Edit button will open the Ship To address field where you may type in the desired Ship To name and address.
- Clicking on the Drop Ship button will automatically change the Ship To address to the Site name and address for

the Job.

When finished, click the OK button to save the Purchase Order. If your company has subscribed to SedonaDocs, and you want to attach a document to the Purchase Order, instead of clicking on the OK button, click on the Apply button then navigate to the Documents tab and scan in or attach an existing document. When finished click the OK button to save the Document(s) to the Purchase Order.

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