

Create a PO for a Service Provider

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It is a good business practice to issue a Purchase Order to Vendors who are processing Service Tickets on behalf of your company.

The Purchase Order is linked directly to the Ticket so that expenses for the services invoiced by the Service Provider will be recorded to the Ticket. Once it has been confirmed the work has been completed by the Service Provider, the Purchase Order may be received directly from the Ticket.

To create the Service Provider Purchase Order, click on the Purchase Orders button on the ribbon of the ticket, and then click on the Purchase Order Menu Tab.

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A new ribbon, Create Purchase Order, will be displayed. Click on the Order Service From Vendor button.

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The New Purchase Order form will be displayed. Fill in the form according your company's policies and procedures.

- Vendor - The Vendor name and address is automatically filled in.
- Direct Expense - Check this box.
- Branch - The Branch field will auto-fill with the default Branch from the Vendor's setup. If this is not the correct Branch, make a selection from the drop-down list.

Click on the Expenses tab and enter or lookup the G/L Account number for the expense; enter the amount and select the appropriate Job Costing Expense Type.

You may override the Description field that is automatically filled in with the G/L Account Number description.

Enter any additional information into the memo field. If you are printing or emailing the Purchase Order via SedonaSync, the memo field text will be printed.

When finished, click on the Save button located at the lower right of the form.

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