How to Make Purchase Orders Required on Service Tickets

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Sometimes a customer may require a Purchase Order on a Service Ticket. If so, you can set up the customer System so that a PO is required when creating a Service Ticket.

Customer System

1. Go to the Customer Account and Right-Click on the System that needs to have a Service Ticket created.
2. Select Edit.
3. Under "Service Information" select the box for "Require PO" and save.

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4. Next, Create a New Service Ticket for that System.
5. Enter the Problem Code and PO Number click Save.

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If a PO Number was not entered in that field, then a pop-up will appear advising a PO Number must be entered to create the Service Ticket.

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