

For Internal Testing - Where to add a PO in WeSuite

07/03/2024 9:06 am EDT

This article is meant to assist internal support reps testing in wesuite. Customers should instead review WeSuite's support documentation.

If a Purchase Order Number is required for a Job, you can enter it when creating the Quote in WeSuite.

WeSuite

Once the Quote is created in WeSuite, select the Status Tab.

Enter the Purchase Order Number.

Save.

The screenshot displays the Sedona Office software interface. At the top, there is a navigation bar with tabs for Project View, Status, Accounting, Forecast, Data Lists, Dates, and Options. Below this, there are buttons for Save and XML Output. The main content area is divided into several sections:

- Job Open: 9/4/2023**
Current Status: Won Job
Project Engineer: -----
Due: 10/04/2023
- Winning Estimate Information**
Sold As: Outright
Sold Amount: \$ 1,515.49
RMR Sold Amount: \$ 0.00
- Job Information**
Job Type Group: CCTV - Residential/Small Commerci
System Type: CCTV
Type Of Sale: Negotiation
Market: Residential
Opportunity ID: 0
Work Order #: [Empty]
Purchase Order #: WeSuite PO#123

Red boxes and arrows highlight the 'Status' tab, the 'Save' button, the 'Purchase Order #' field, and the 'WeSuite PO#123' value.

Sedona Office

Once the Job is created in Sedona Office the Purchase Order Number will appear on the Work Order Screen.

Job	Job	Customer 49954	Site
Job Number		Kelley Ainsworth	Pool House
Job Type	CCTV-Res	2525 Ascroft Court	4567 Blue Lagoon Drive
Job Status	Parts	Baton Rouge, LA 70816	Baton Rouge, LA 70816
New System	CCTV		
Labor Units			

Work Order Entry

Job Information

Locked

Job Number	5131-1	Prevailing Wage	<input type="text"/>
Job Type	CCTV-Res	Project Manager	<input type="text"/>
Description	Kelley Ainsworth - Pool House	Salesperson	Amy Bartimus
Tax Group	NC - State Tax	P.O. Number	WeSuite PO#123456
Branch	MI	Sold Date	9/4/2023
HoldBack %	<input type="text"/>	Projected Start	<input type="text"/>
Install Company	MI	Projected End	<input type="text"/>
Installer	<input type="text"/>	Notes	<input type="text"/>
<input type="checkbox"/> Permits Required			
Permit 1	<input type="text"/>		
Permit 2	<input type="text"/>		
Permit 3	<input type="text"/>		

Apply