

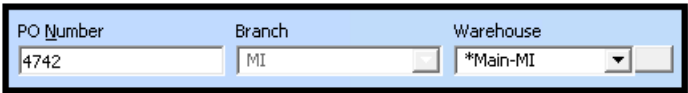
How to Make Branch Field Live in Purchase Orders

04/29/2024 10:59 am EDT

Description of Issue:

The customer was having difficulty with getting the branch to default properly.

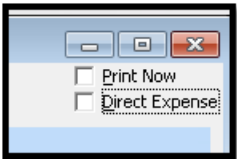
When creating a Purchase Order in SedonaOffice, the Branch field is grayed out and I cannot choose the branch I want.



A screenshot of a software form with three fields: 'PO Number' containing '4742', 'Branch' containing 'MI', and 'Warehouse' containing '*Main-MI'. The 'Branch' field is grayed out, and the 'Warehouse' field has a dropdown arrow.

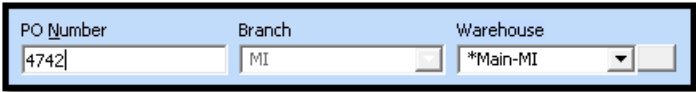
Resolution:

The Branch field will default to the Branch that is associated with the Warehouse. If you find that you need to change the Branch of the Purchase Order but it is grayed out, then you should either change the branch associated with the warehouse or if the PO is not being sent to a warehouse, mark the Direct Expense box on the PO.



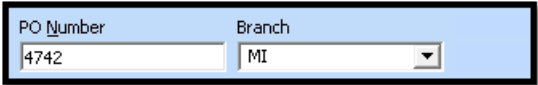
A screenshot of a small dialog box with two checkboxes: 'Print Now' and 'Direct Expense'. Both checkboxes are currently unchecked.

When Direct Expense is unmarked, the Branch option is not accessible, but the Warehouse dropdown menu option will be available and accessible.



A screenshot of the same software form as before. The 'Branch' field is now active and shows a dropdown arrow, indicating it is no longer grayed out.

Marking the Direct Expense box will remove the Warehouse dropdown menu option, but you will be able to update the Branch information instead.



A screenshot of the software form with the 'Warehouse' field removed. The 'Branch' field is now a dropdown menu and is active.