

A GL Account is Not Available on the Expense Tab of a Purchase Order linked to a Job

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When a PO is linked to a Job, the Job Type setup controls whether or not a GL Account is available on the Expense Tab.

Purchase Order

Create a New Purchase Order and select a Job Number.

Go to the Expense Tab and select the drop-down menu for the GL Account.

If the GL Account needed is not listed, and you are not able to access the GL Account List button, this is controlled by the Job Type Setup for the Job linked to the Purchase Order.

The screenshot shows the 'New Purchase Order' form. The 'Vendor' is 'Bosch Security Systems Inc.' and the 'Category' is 'Admin G & A'. The 'Purchase Order' section includes fields for 'PO Number' (5058), 'Branch' (Alabama), 'Tracking #', 'Order Date' (3/2/2025), 'Ship Date', 'Ship Method', 'Parts Due Date', 'Job Number' (5199-2), and 'Job Phase Code' (Phase 01). The 'Ship To' address is 'Sedona Security, 999 Maple St, Suite 100-M, Northville, MI 48888'. The 'Expenses' tab is selected, and the 'General Ledger' table is visible. The table has columns for 'GL Account', 'Description', 'Qty', 'Rate', 'Amount', 'Rcvd', and 'Cost'. A red box highlights the 'GL Account' dropdown menu, which is currently set to '610122 Advertising - Misc. Expense'.

The screenshot shows the 'New Purchase Order' form with the 'Job Number' field empty. The 'Expenses' tab is selected, and the 'General Ledger' table is visible. The table has columns for 'GL Account', 'Description', 'Qty', 'Rate', 'Amount', 'Rcvd', and 'Cost'. A red box highlights the 'GL Account' dropdown menu, which is currently set to '610122 Advertising - Misc. Expense'. A red arrow points to the dropdown menu, indicating that the GL Account is not available for the selected Job Number.

SedonaSetup - Job Types

Go to SedonaSetup and select Job Types.

Select the Job Type for the Job linked to the Purchase Order.

Select the Accounts Tab.

The GL Accounts listed in that Section will be the only ones available in the GL Account drop-down menu on the Purchase Order, and this will prevent you from being able to access the GL Account List button on a PO.

The screenshot shows the 'Job Type Setup' window with the 'Accounts' tab selected. The 'Job Type' is 'ACC-Res' and the 'Description' is 'Access - Residential'. The 'Accounts' tab contains a table with the following data:

Account Code	Description	Default Amount
610122	Advertising - Misc.	0.00

At the bottom of the window, there are input fields for 'Account' and 'Amount', and buttons for 'Save', 'New', 'Remove', 'Apply', 'New', 'Copy', and 'Delete'.

New GL Accounts can be added to the Account List in the Job Type, which will then show in the GL Account drop-down menu on the PO.

If you remove each of the GL Accounts listed under the Accounts Tab in the Job Type, the GL Account List Button will become visible, and you can select the GL Account needed.

If there are still GL Accounts listed in the drop-down menu, these are entered under the Vendor Information > GL Accounts Tab.