

Paying with a Purchase Order: When a customer account is set up to require a Purchase Order (PO), work orders for that customer are held at the sub status **Job Complete Waiting On PO or Payment** until a PO number is submitted. This guide shows how a PO number is entered and submitted against a work order so it can move forward for payment.

Note: Portions of application pages are grayed/blurred out to conceal and protect identities.

Step 1 — Customer Set Up as PO Required

ACCOUNT SETUP

On the customer's **Account** record, the **Administration** section controls how purchase orders are handled. For this customer, **Purchase Order Required** is set to **Yes**, with a **Purchase Order Dollar Limit** of \$500.00. Because a PO is required, every work order for this account will need a PO number before it can be paid.

The screenshot displays the 'Customer Account' record in the eSHOP 2.0 application. The interface is divided into several sections: SUMMARY, DETAILS, ASSETS AND LOCATIONS, SERVICING, WARRANTIES, TIMELINE AND DOCUMENTS, INCLUSIONS / EXCLUSIONS, and Related. The 'ADMINISTRATION' section is highlighted, showing the following settings:

- Purchase Order Required:** Set to **Yes** (indicated by a red box).
- Purchase Order Approval:** Set to **No**.
- Purchase Order Dollar Limit:** Set to **\$500.00**.

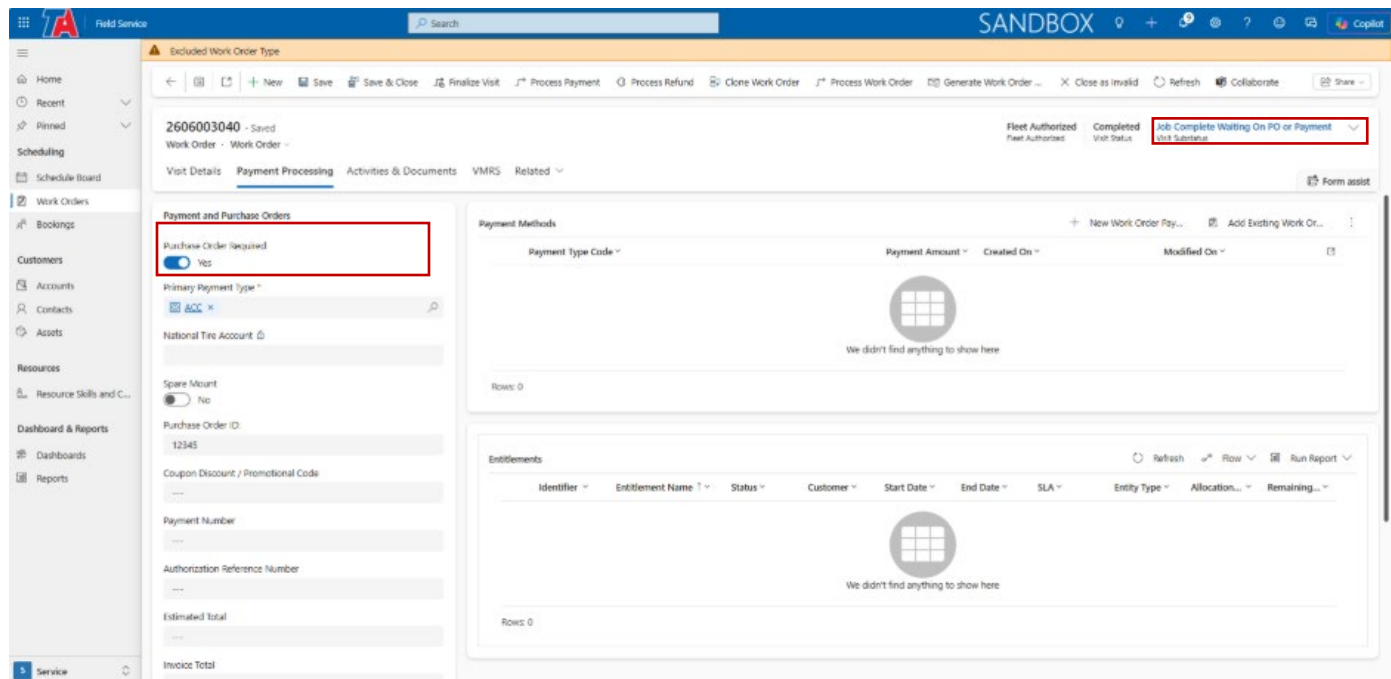
Other sections visible include 'CONTACT PREFERENCES' (Primary Time Zone: GMT-08:00 Central Time (US & Canada), Contact Method: Any, etc.) and 'BILLING' (Credit Limit, Credit Allocated, etc.). The 'ACCOUNTING' section at the bottom shows the Billing Account and Default Price List.

Customer Account record — Purchase Order Required is set to Yes in the Administration section.

Step 2 — A Work Order Is Created for the Customer

WORK ORDER · WAITING ON PO

When service is completed for the customer, the work order reaches the **Payment Processing** stage. Note its status: the **Visit Status** is **Completed** and the **Visit Sub status** is **Job Complete Waiting On PO or Payment. Purchase Order Required** shows **Yes**, confirming a PO is needed.

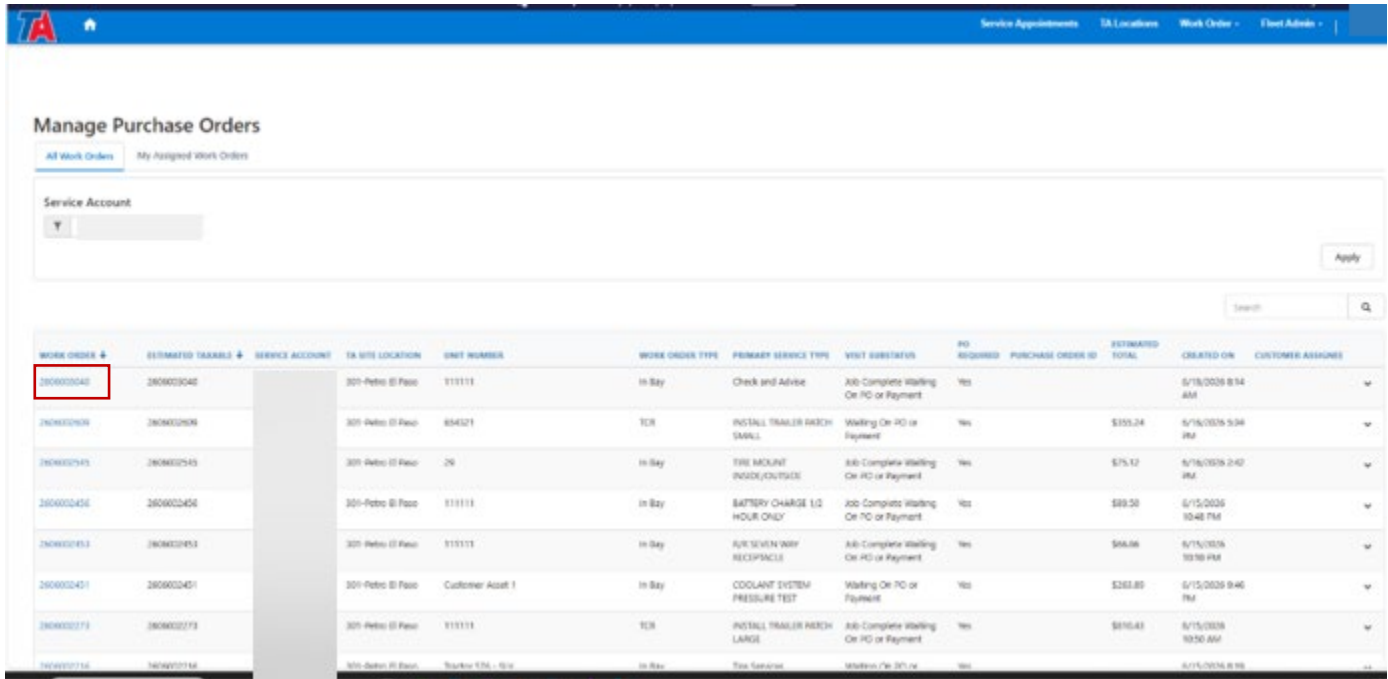


Work order at Completed / Job Complete Waiting On PO or Payment, with Purchase Order Required = Yes.

Step 3 — Work Order Appears on the Portal

PORTAL · ACTION REQUIRED

In the eShop 2.0 portal, the work order appears on the **Manage Purchase Orders** page for the fleet to action. Filter by the **Service Account** to find it. The **Visit Sub status** reads **Job Complete Waiting On PO or Payment** and **PO Required** shows **Yes**.



WORK ORDER	ESTIMATED TOTAL	SERVICE ACCOUNT	SA SITE LOCATION	UNIT NUMBER	WORK ORDER TYPE	PRIMARY SERVICE TYPE	VISIT SUB STATUS	PO REQUIRED	PURCHASE ORDER ID	ESTIMATED TOTAL	CREATED ON	CUSTOMER ASSIGNED
2606002040	2606002040		301-Petro (I) Paso	111111	In-Shop	Check and Advise	Job Complete Waiting On PO or Payment	Yes			5/18/2025 8:14 AM	
2606002069	2606002069		301-Petro (I) Paso	854321	TCR	INSTALL TRAILER HATCH DASH	Waiting On PO or Payment	Yes		\$155.24	5/16/2025 5:34 PM	
2606002045	2606002045		301-Petro (I) Paso	29	In-Shop	TIRE MOUNT INVOKE/OUTSIDE	Job Complete Waiting On PO or Payment	Yes		\$75.12	5/16/2025 2:42 PM	
2606002456	2606002456		301-Petro (I) Paso	111111	In-Shop	BATTERY CHARGE 1/2 HOUR ONLY	Job Complete Waiting On PO or Payment	Yes		\$89.50	5/15/2025 10:48 PM	
2606002453	2606002453		301-Petro (I) Paso	111111	In-Shop	AIR/STEERING/BOY RECEPTACLE	Job Complete Waiting On PO or Payment	Yes		\$68.86	5/15/2025 10:59 PM	
2606002451	2606002451		301-Petro (I) Paso	Customer Asset 1	In-Shop	COOLANT SYSTEM PRESSURE TEST	Waiting On PO or Payment	Yes		\$263.85	5/15/2025 9:46 PM	
2606002273	2606002273		301-Petro (I) Paso	111111	TCR	INSTALL TRAILER HATCH LARG	Job Complete Waiting On PO or Payment	Yes		\$810.43	5/15/2025 10:50 AM	
2606002113	2606002113		301-Petro (I) Paso	Tractor 116 - 101	In-Shop	Tire Rotation	Waiting On PO or Payment	Yes		\$174.00/116 9:10		

Portal Manage Purchase Orders page — the work order is listed with PO Required = Yes.

1. Click the **Work Order** number to open its details.

Step 4 — Enter the PO Number and Submit

ENTER PO · SUBMIT

The work order opens on the **Manage Purchase Order** form. The Instructions banner reads: *Enter Purchase Order ID and Confirmation, if required, and submit.* Review the **Work Order Details** and **Service Estimate** to confirm you have the correct record.



Service AppointmentsSA LocationsWork OrderFleet Admin

Manage Purchase Order

Instructions

Enter Purchase Order ID and Confirmation, if required, and submit.

Work Order Details

WORK ORDER NUMBER *	SERVICE ACCOUNT *	WORK ORDER TYPE *	PRIMARY SERVICE TYPE
260602456		In Bay	BATTERY CHARGE 1/2 HOUR ONLY
SA SITE LOCATION *	PRIMARY CUSTOMER ASSET *	FLEET AUTHORIZATION	PAYMENT TYPE *
301-Weto (S) Race		Fleet Authorized	Cdn
TIME WINDOW START	TIME WINDOW END	ACTUAL DURATION	VISIT STATUS
6/15/2025 11:03 PM	6/15/2026 11:03 PM	2 minute	Completed
CUSTOMER ASSIGNEE	LATITUDE	LONGITUDE	CREATED ON
	31.66080	-106.24243	6/15/2025 10:48 PM

VISIT SUBSTATUS

Job Complete Waiting On PO or Payment

CUSTOMER ASSET DETAILS

 This site is protected: Only specific people can view this info. [Learn more](#)

Signed in as **Bessett Stokes**

CUST/UNIT NUMBER *
111111
VIN
CATEGORY
Tractor

Portal Manage Purchase Order form — review the work order details before entering the PO.

1. Scroll to the **Purchase Order Details** section.
2. In the **Purchase Order ID** field, type the PO number.
3. In the **Purchase Order ID Confirmation** field, type the same PO number again to confirm it. Ensure **Purchase Order Required** is set to **Yes**.

Page 1 of 1 Previous Next

Service Estimate

ESTIMATED PARTS	ESTIMATED LABOR
\$0.00	\$55.00
ESTIMATED NEW TIRES	ESTIMATED USED TIRES
\$0.00	\$0.00
ESTIMATED OIL	ESTIMATED TRADE IN
\$0.00	
ESTIMATED NON TAXABLE	ESTIMATED TAXABLE
	\$0.00
ESTIMATED DISCOUNT	ESTIMATED ENVWST TAX
\$0.00	\$0.00
ESTIMATED NET	ESTIMATED TOTAL
\$89.50	\$89.50

Purchase Order Details

PURCHASE ORDER ID: *	PURCHASE ORDER ID CONFIRMATION *	PURCHASE ORDER REQUIRED
12345	12345	☐ No ☒ Yes

Enter the PO number in Purchase Order ID and re-enter it in Purchase Order ID Confirmation.

4. Click **Submit**.
5. In the **Enter Comments** dialog, type a comment (a comment is **mandatory**), then click **Confirm**.

Enter Comments

Comment is mandatory.

PO Approved

Confirm

Purchase Order Details

PURCHASE ORDER ID: *	PURCHASE ORDER ID CONFIRMATION *	PURCHASE ORDER REQUIRED
12345	12345	☐ No ☒ Yes

Work Order Comments

Comment is required — enter it in the Enter Comments dialog and click Confirm, then Submit.

Step 5 — PO Recorded on the Work Order

SUBMITTED · REQUIRES TA ACTION

After submitting, the PO is recorded on the work order. On the **Payment Processing** tab, the **Purchase Order ID** now shows the number you entered, and the **Visit Substatus** has changed to **Requires TA Action** — the order has moved out of “Waiting On PO or Payment” and is now with TA to process.

The screenshot displays the eSHOP 2.0 interface for a work order. The top navigation bar includes a search bar and a 'Sandbox' label. The left sidebar contains various navigation options like Home, Recent, Pinned, Scheduling, and Work Orders. The main content area is divided into several sections. On the left, under 'Payment and Purchase Orders', the 'Purchase Order ID' is highlighted with a red box and shows the value '12345'. On the right, under 'Payment Methods', there is a table with columns for Payment Type Code, Payment Amount, Created On, and Modified On. Below this, there is a section for 'Entitlements' with a table that includes columns for Identifier, Entitlement Name, Status, Customer, Start Date, End Date, SLA, Entity type, Allocation, and Remaining. The 'Requires TA Action' status is highlighted in the top right corner of the main content area.

Work order now shows the Purchase Order ID and a Visit Substatus of Requires TA Action.

Summary

When a customer is set to **PO Required**, a completed work order waits at **Job Complete Waiting On PO or Payment** until you enter and submit a PO number on the Portal’s **Manage Purchase Order** form. Entering the **Purchase Order ID** and **Confirmation**, adding the required comment, and clicking **Submit** records the PO and moves the work order to **Requires TA Action** for payment processing.