

## How do I Finally Close a Purchase Order?

You would like to **Finally Close** a purchase order.

### Notes:

- The purchase order must be in an **APPROVED** status.
- You must be listed as the **Buyer**.
- You should **NOT** unreserved the purchase order.

### Solution:

#### Find the PO:

1. On the **Navigator** form select **UVA PO Purchaser >> Purchasing >> Purchase Orders >> Purchase Order Summary**
2. Enter Purchase Order information into either the **Number** field or the **Buyer** field
3. Click **Find**

#### Are you the Buyer?

**Please read all 3 questions below BEFORE you begin in order to determine if you can control the Purchase Order.**

Is your name in the Buyer field? You cannot control the PO unless your name is in the Buyer field.

#### Question #1:

Is your name listed in the Buyer field on the purchase order? If **yes**, you can control the PO.

#### Question #2:

If you answered “**no**”, answer the following question: “Is the name listed someone who currently works in your department or who used to work there and is no longer there?” If **yes**, consult with the person who is listed as the Buyer. If they have left the department, they you may replace their name with your name in the Buyer field.

The following are instructions on how to replace the Buyer name:

- Open the PO
- Delete the name currently in the Buyer field
- Enter your name in the Buyer field (last name, then TAB)
- Save your work
- Click the [OK] button
- Click the Approve button to reapprove the PO

- Click the [OK] button
- Re-query the PO (PO Summary, Find but do not OPEN it). Scroll over to the right to see your name listed as the Buyer.

### Question #3:

If **no**, is the name listed a buyer in **Procurement Services**? If **yes**, then the PO was created by a Central Buyer in the Procurement and Supplier Diversity Services department. You should **NOT** change the Buyer field to your name! Instead, complete the Purchase Order Change Request form found on the Procurement and Supplier Diversity Services website. The Central Buyer will control the PO for you.

### What is the Status of the PO?

Scroll to the right to view the status of the PO. It must be in an “**Approved**” status.

### View Invoices:

On the **Purchase Order Header** menu bar, select **Inquire >> View Invoices** to verify all invoices have been paid. The system will NOT let you Finally Close a purchase order that has outstanding invoices awaiting payment. Close the window.

### Control the PO:

1. In the menu bar, click **Tools >> Control**
2. In the **Actions** field, select **Finally Close** – closes all actions on a purchase order. The Finally Close action option is only available to the buyer listed on the purchase order. This will automatically create credit encumbrance journal entries in the general ledger system. This action is **irrevocable**.

**Note:** If you have any issues with the Supplier or Supplier site, please see below for help.

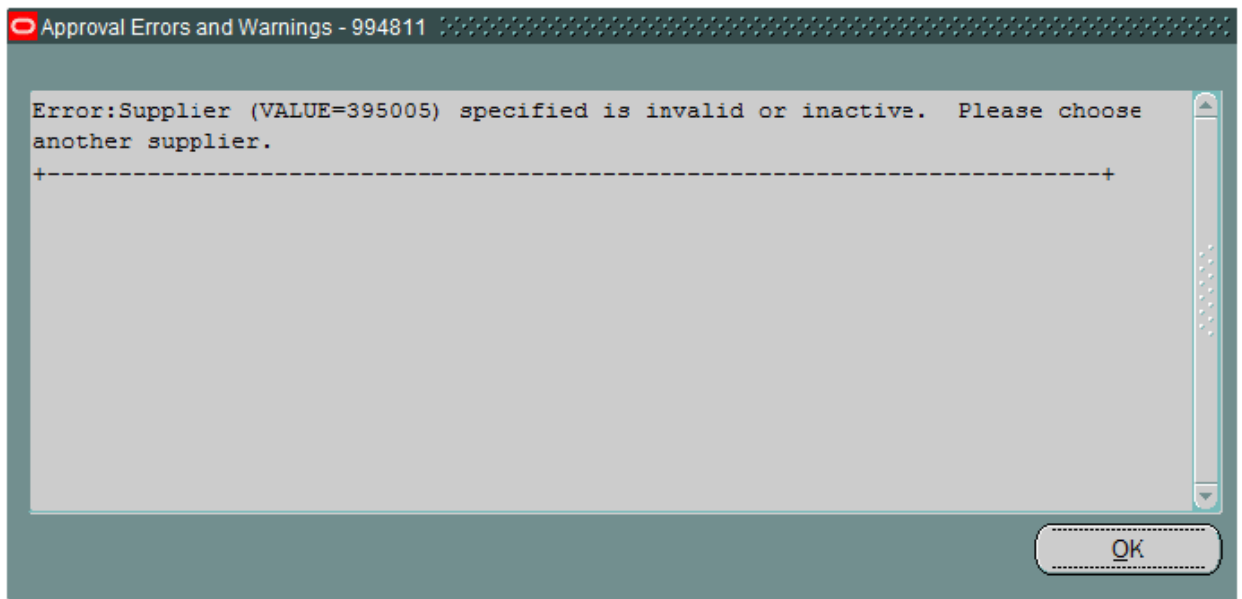
3. In the **Reason** field, enter a reason for control. Click **OK**
4. On the Caution message, click **OK**
5. On the Note message, click **OK**
6. Close the PO. Requery the PO to confirm your control action was successful

### Supplier Issues:

Sometimes you may have trouble when trying to Finally Close a purchase order if either the Supplier Site or the Supplier is inactive. You will need to perform different steps depending on whichever one if the issue.

- **Supplier Site is Inactive:** A purchase order cannot be Finally Closed if the supplier site is inactive. Therefore, please use the following work around:

1. Open and unreserve the purchase order. The inactive site should no longer be grayed out
  2. Change the supplier **site** to an active site
    - Note: The Ship-To location may disappear. If that happens, re-enter the Ship-To information
  3. Save your changes
  4. Reapprove and close the purchase order
- **Supplier in Invalid or Inactive:** A purchase order cannot be Finally Closed if the supplier is invalid or inactive. You will see the following message when you try to Approve the PO:



Therefore, please use the following work around:

1. Contact the Procurement Services Vendor File Coordinators (434-924-4212) to ask them to *temporarily* reactivate the supplier
2. Once the supplier has been reactivated, then you will be able to Finally Close the purchaser order
3. When you have Finally Closed the purchase order, then you must contact the Procurement Services Vendor File Coordinators again to tell them you are done so that they can inactivate the Supplier again.
4. Save your changes
5. Reapprove and close the purchase order.