

# Closing Purchase Orders

Use this guide to review invoices, check access, and close purchase orders for Academic or Miller School of Medicine.

<http://workday.miami.edu>

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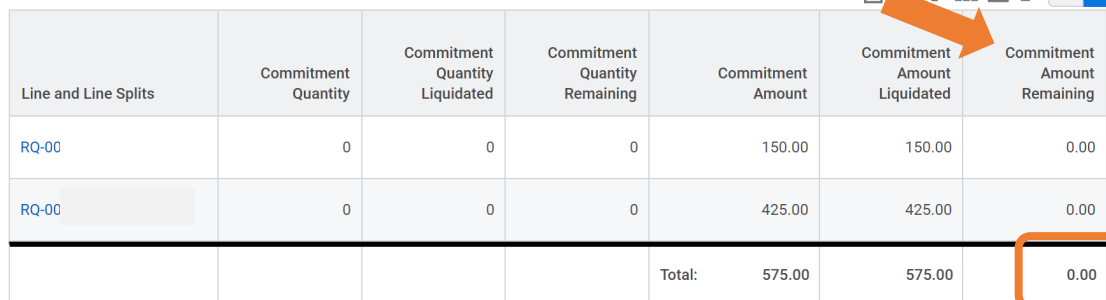
**1. Invoices** - Be advised, once a purchase order is closed, additional invoices will need to be paid from a different purchase order.

- Check the requisition's **Balances** tab to confirm the *Commitment Amount Remaining* is \$0.

**TIP:** If a line item was cancelled by either the department or the supplier, an amount may appear, but the PO can still be closed.

#### ▼ Balances

2 items



Line and Line Splits	Commitment Quantity	Commitment Quantity Liquidated	Commitment Quantity Remaining	Commitment Amount	Commitment Amount Liquidated	Commitment Amount Remaining
RQ-00	0	0	0	150.00	150.00	0.00
RQ-00	0	0	0	425.00	425.00	0.00
Total:				575.00	575.00	0.00

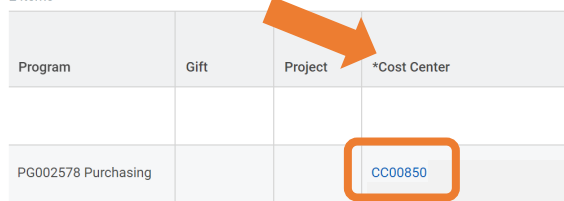
- Contact the supplier to confirm all invoices for this purchase order have been paid.

**2. Access** – Only users with the Workday security role *Department Procurement Data Entry Specialist* can close a purchase order. To view the list of users with access:

- a. Scroll down to the Goods/Services Lines and click the Cost Center number.

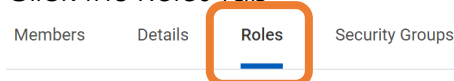
#### ▼ Service Lines

2 items



Program	Gift	Project	*Cost Center
PG002578 Purchasing			CC00850

- b. Click the *Roles* tab



Members	Details	Roles	Security Groups

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- c. Scroll down to the *Department Procurement Data Entry Specialist* role. The employees listed have access to close this purchase order.

Assignable Role	Assigned To
Department Procurement Data Entry Specialist	Manuel Marine
	Diego Rodriguez

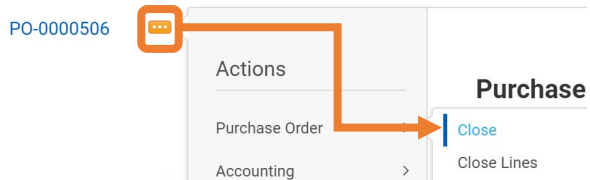
**TIP:** To request the *Department Procurement Data Entry Specialist* security role, email [Help@miami.edu](mailto:Help@miami.edu).

## Closing a PO

- a. [Search](#) for the purchase order.

4. Click the related actions button, hover over *Purchase Order* and select **Close**.

**TIP:** If the *Close* option does not appear and you have been granted the [PDES security role](#), contact [Accounts Payable](#) to confirm if there are any pending Receive Requests or if there is a draft invoice that needs to be processed or canceled.



4. Review the details and confirm this is the correct purchase order. Then click **OK**.

OK

For assistance, contact the [PurchasingHelpDesk@miami.edu](mailto:PurchasingHelpDesk@miami.edu)