



Closing Purchase Orders

Instructions on how to close a PO for those with a PO Close Role in buyWays.

Step 1

Pull up the PO in buyWays that you want to close

Step 2

Choose Close PO from the drop down

Purchase Order • Motivational Sports Product... • CU00596559 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts 1 Invoices 1 Comments Attachments 3 History

| General Information | | Document Status | |
|---------------------|--|--|---------------------------------|
| PO/Reference No. | CU00596559 | A/P status | Open |
| Revision No. | 0 | Workflow | Completed (2/3/2023 7:25 AM) |
| Supplier Name | Motivational Sports Products, Inc. | The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view | |
| Purchase Order Date | 2/3/2023 | Email (HTML Body) | derek@diamondpromo.com |
| Total | 3,630.60 | Distribution Date/Time | 2/3/2023 7:25 AM |
| Owner Name | Amanda Smith | Supplier | Sent To Supplier |
| Owner Phone | +1 803-699-3176 | | |
| Owner Email | abs4@clemson.edu | | |
| Requisition Number | 167694227 view print | | |
| Contact | Amanda Smith | | |
| Email | abs4@clemson.edu | | |
| Phone | +1 803-699-3176 | | |

Details

Supplier Status

Sent To Supplier

Supplier

Motivational Sports Product...

Total (3,630.60 USD)

Shipping, Handling, and Tax charges must be entered by the Requisitioner. The values entered here will be budget checked and workflow routed accordingly. Values will also be given to vendor on PO.

| | |
|--------------|-----------------|
| Subtotal | 3,435.00 |
| Sales Tax | 195.60 |
| Use Tax | 0.00 |
| Shipping | 0.00 |
| Handling | 0.00 |
| Total | 3,630.60 |

Step 3

Add a note as to why you are closing the PO, click OK

Purchase Order • Motivational Sports Product... • CU00596559 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts 1 Invoices 1 Comments Attachments 3 History

| General Information | |
|---------------------|------------------------------------|
| PO/Reference No. | CU00596559 |
| Revision No. | 0 |
| Supplier Name | Motivational Sports Products, Inc. |
| Purchase Order Date | 2/3/2023 |
| Total | 3,630.60 |
| Owner Name | Amanda Smith |
| Owner Phone | +1 803-699-3176 |
| Owner Email | abs4@clemson.edu |

Add Note [X]

Specify the reason for changing the A/P status to closed.

[expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[OK](#) [Cancel](#)

Step 4

From the drop down, choose Finalize Revision.

Purchase Order • Motivational Sports Product... • CU00596559 Revision 0 (Closed)

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts 1 Invoices 1 Comments Attachments 3 History

| General Information | | Document Status | |
|---------------------|--|--|-----------------------------------|
| PO/Reference No. | CU00596559 | A/P status | Closed |
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| Contact | Amanda Smith | | |
| Email | abs4@clemsion.edu | | |
| Phone | +1 803-699-3176 | | |

| Details | |
|--|-----------------------------------|
| Supplier Status | |
| Sent To Supplier | |
| Supplier | Motivational Sports Products,Inc. |
| Total (3,630.60 USD) | |
| Shipping, Handling, and Tax charges must be entered by the Requisitioner. The values entered here will be budget checked and workflow routed accordingly. Values will also be given to vendor on PO. | |
| Subtotal | 3,435.00 |
| Sales Tax | 195.60 |
| Use Tax | 0.00 |
| Shipping | 0.00 |
| Handling | 0.00 |
| | 3,630.60 |

- Add Comment
- Add Notes to History
- Finalize Revision**
- Print Fax Version
- Open PO
- Resend to Supplier

Step 5

Enter a revision name (ex: REV1) and revision note (PIF, closed, etc), Make sure that PO Export to PS is selected. Click Save.

Purchase Order • Motivational Sports Product... • CU00596559 Revision 0 (Closed)

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts

| General Information | |
|---------------------|--|
| PO/Reference No. | CU00596559 |
| Revision No. | 0 |
| Supplier Name | Motivational Sports Products,Inc. |
| Purchase Order Date | 2/3/2023 |
| Total | 3,630.60 |
| Owner Name | Amanda Smith |
| Owner Phone | +1 803-699-3176 |
| Owner Email | abs4@clemsion.edu |
| Requisition Number | 167694227 view print |
| Contact | Amanda Smith |
| Email | abs4@clemsion.edu |
| Phone | +1 803-699-3176 |

Finalize Revision

Enter revision name and note. The revision name is required.

NOTE: Finalizing a revision will not automatically save changes. Save changes prior to finalizing revision or resending PO.

PO No. CU00596559

Revision: 1

Revision Name *

Revision Note

994 characters remaining

Resend to...

✓ PO Export to Peoplesoft

Save **Close**

Step 6

This Finalize Revision note will appear to tell you that the revision has taken place. Click Close.

- It will take approximately 15 minutes to sync with Peoplesoft before the encumbrance is cleared.

The screenshot shows a web application interface for a Purchase Order. The breadcrumb trail at the top reads: "Purchase Order • Motivational Sports Product... • CU00596559 Revision 0 (Closed)". Below this is a navigation bar with tabs: "Status", "Summary", "Revisions 1", "Confirmations", "Shipments", "Change Requests", "Receipts 1", "Invoices 1", "Comments", "Attachments 3", and "History". The main content area is titled "General Information" and contains a table of fields:

| | |
|---------------------|--|
| PO/Reference No. | CU00596559 |
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Overlaid on the right side of the screen is a "Finalize Revision" dialog box. It contains the following text: "CU00596559 The PO will be resent to the external system with the information from this revision. If changes are made to this PO revision, please create another revision and resend it again." A "Close" button is located at the bottom right of the dialog box.

Questions about the process or errors, please contact disbursements@clemsn.edu.

Disclaimer: If a PO is closed in error, you are responsible for creating a new PO. We will not re-open POs that are closed in error.