



ADDY TIP



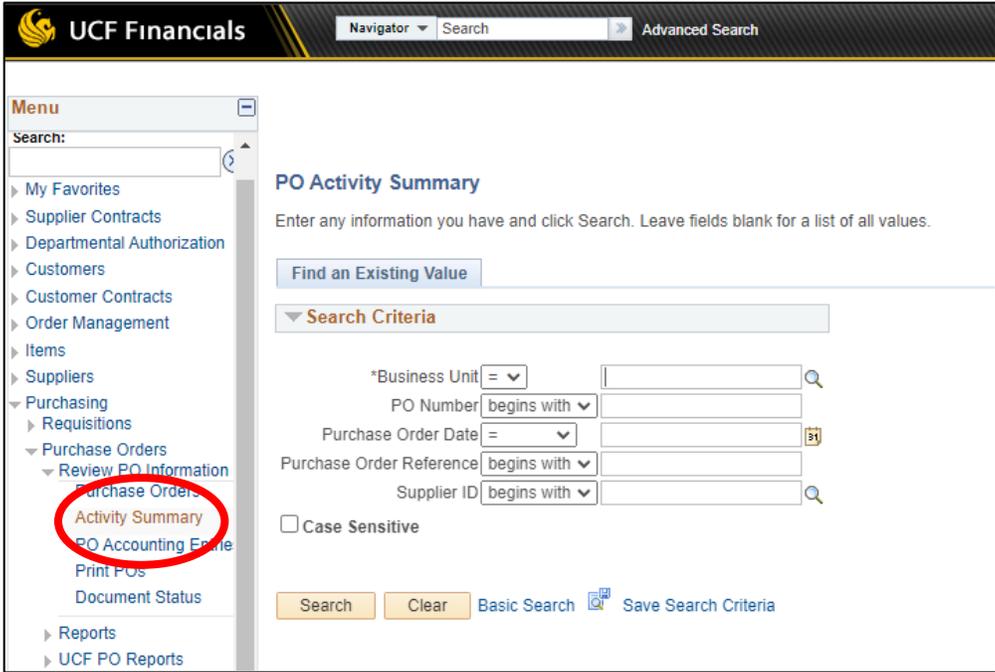
FINANCIALS
REFERENCE
DATABASE

ATTENTION:

This Addy Tip is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

Using Purchase Order Inquiry to Review Purchase Order

This Addy Tip will describe how you can review current Purchase Order (PO) activity. By reviewing the PO balances, you can determine if all the invoices have been received and if any purchase orders can be closed.

Step	Action
1.	<p>To review the Purchase Order balances, navigate to: Purchasing > Purchase Orders > Review PO Information > Activity Summary.</p> 



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2.	<p>Enter the PO number in the PO Number search field. Note: In the image below, the Purchase Order number has been pixelated. Then, select the Search button.</p> <div data-bbox="300 562 1404 1102"><p>PO Activity Summary</p><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><p>Find an Existing Value</p><p>Search Criteria</p><p>Business Unit = UCF01</p><p>PO Number begins with [Pixelated]</p><p>Purchase Order Status [Pixelated]</p><p>Purchase Order Reference begins with [Pixelated]</p><p>Supplier ID begins with [Pixelated]</p><p><input type="checkbox"/> Case Sensitive</p><p>Search <input type="button" value="Clear"/> Basic Search Save Search Criteria</p></div>												
3.	<p>The Activity Summary page displays.</p> <div data-bbox="300 1192 1404 1816"><p>Activity Summary</p><p>Business Unit UCF01 PO Status Dispatched</p><p>Purchase Order [Pixelated] Supplier [Pixelated]</p><p>Supplier Location 001</p><p>Merchandise Amount 10,000.00 USD</p><p>Merchandise Receipt [Pixelated] USD</p><p>Merchandise Returned 0.00 USD</p><p>Merchandise Invoice [Pixelated] USD</p><p>Merchandise Matched [Pixelated] USD</p><p>Lines Personalize Find View All [Page Icons] First 1 of 1</p><p>Details Receipt Invoice Matched RTV</p><table border="1"><thead><tr><th>Line</th><th>Item</th><th>Item Description</th><th>UOM</th><th>Manufacturer ID</th><th>Mfg Itm ID</th></tr></thead><tbody><tr><td>1</td><td>[Icon]</td><td>Establish PO for the purchase</td><td>LOT</td><td></td><td></td></tr></tbody></table><p>Return to Search Notify</p></div>	Line	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	1	[Icon]	Establish PO for the purchase	LOT		
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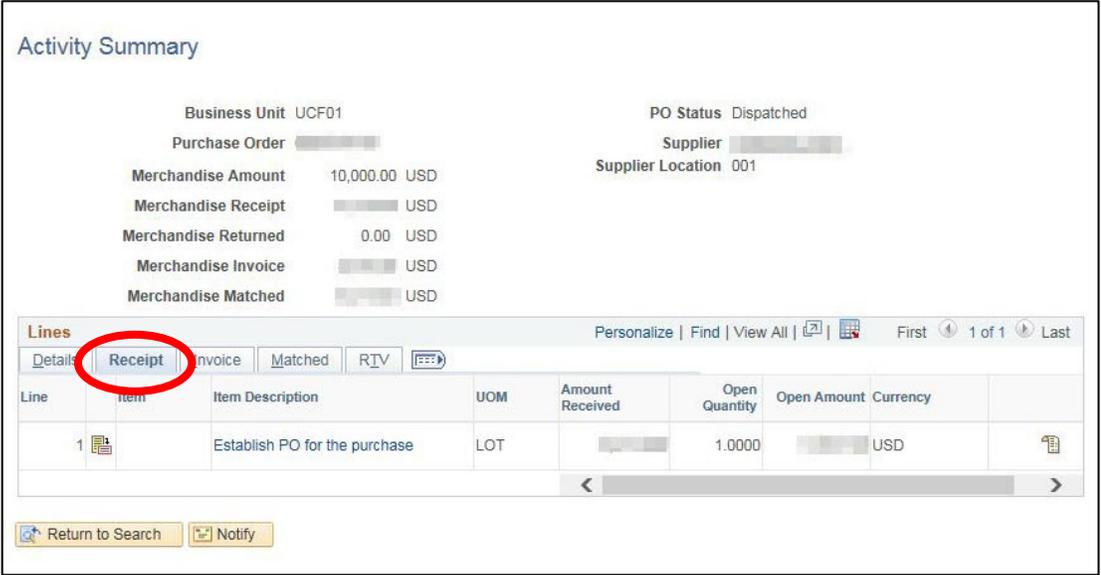
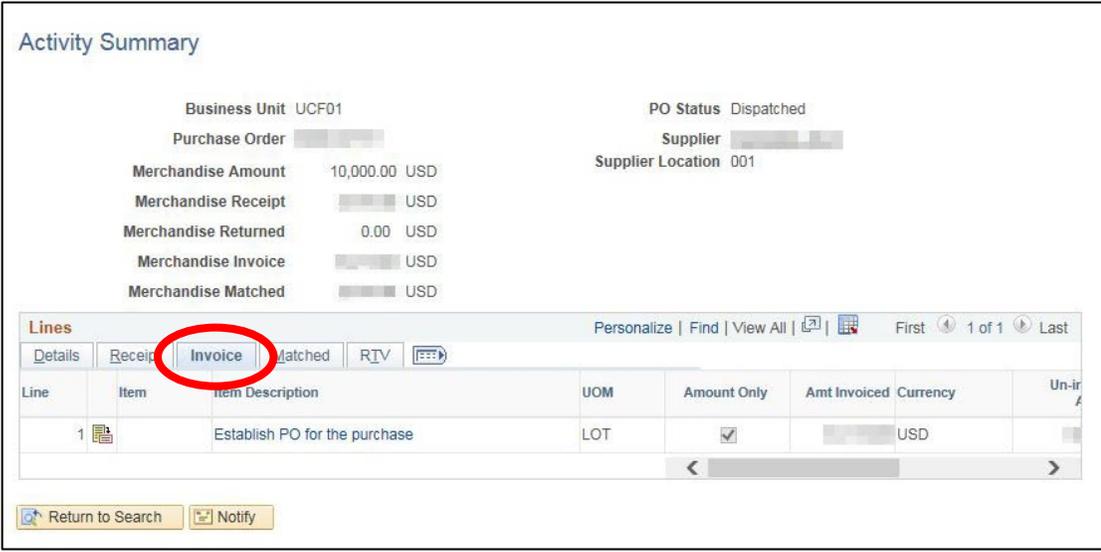


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Step	Action
4.	<p>Select the Receipt tab to review the receipts that have been received against this PO balance.</p>  <p>The screenshot shows the 'Activity Summary' for Business Unit UCF01 and PO Status Dispatched. The 'Receipt' tab is highlighted with a red circle. The 'Lines' table below shows one line item: 'Establish PO for the purchase' with a quantity of 1.0000 and currency USD.</p>
5.	<p>Select the Invoice tab to review the invoices that have been received against this PO balance.</p>  <p>The screenshot shows the 'Activity Summary' for Business Unit UCF01 and PO Status Dispatched. The 'Invoice' tab is highlighted with a red circle. The 'Lines' table below shows one line item: 'Establish PO for the purchase' with a checked box in the 'Amount Only' column and currency USD.</p>