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OF GLOUCESTER
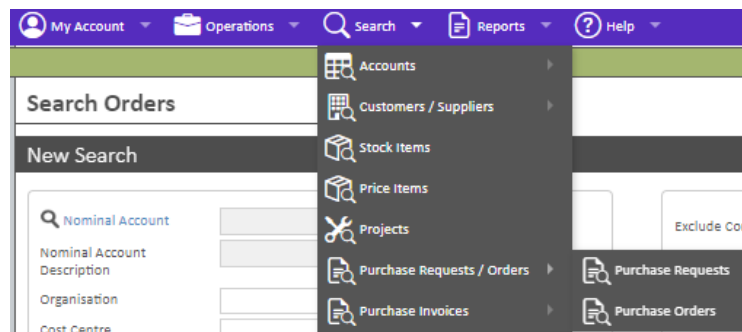ACADEMIES TRUST
unlocking potential

Closing a Purchase Order

Overview

Purchase orders that are either no longer required or are duplicates that were created in error, should be closed. Closing a purchase order will remove the commitment that is held on it.
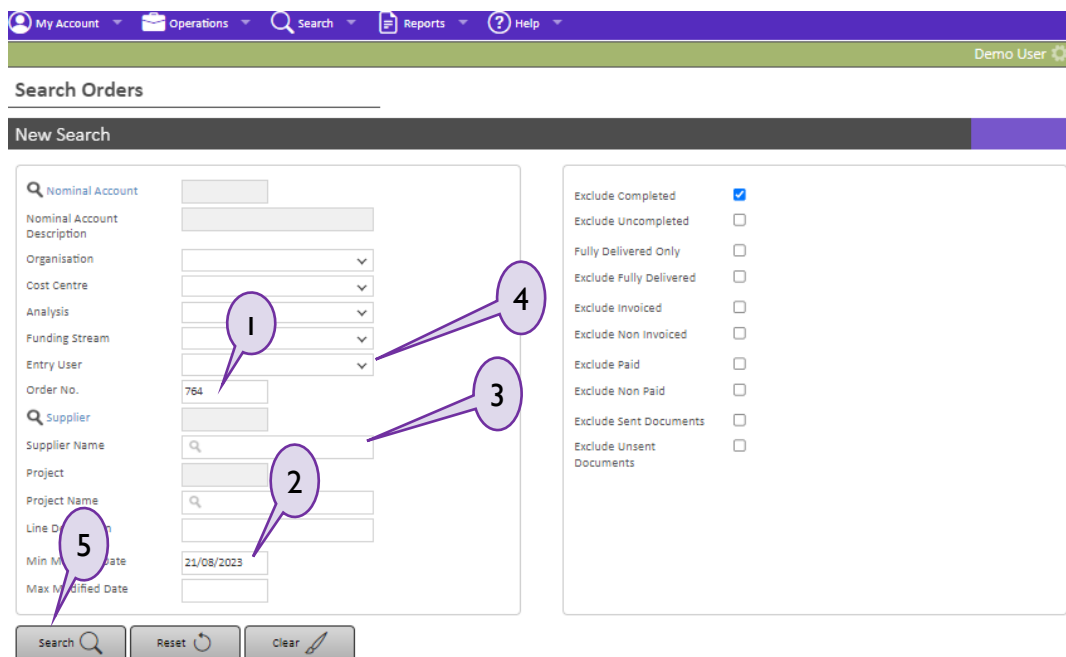
1.1. Menu

Search – Purchase Requests/Orders – Purchase Orders

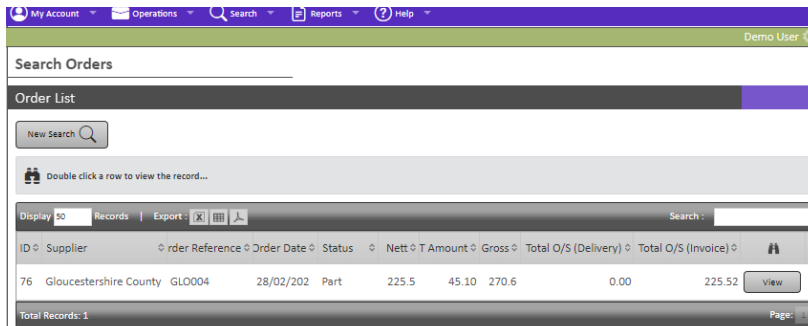Access the purchase order from the order enquiry menu.

1.2. Retrieve the purchase order

Enter the purchase order details, for example the purchase order number if known. If not known, enter something that will be useful to search on like the supplier name or the person who entered the original order.
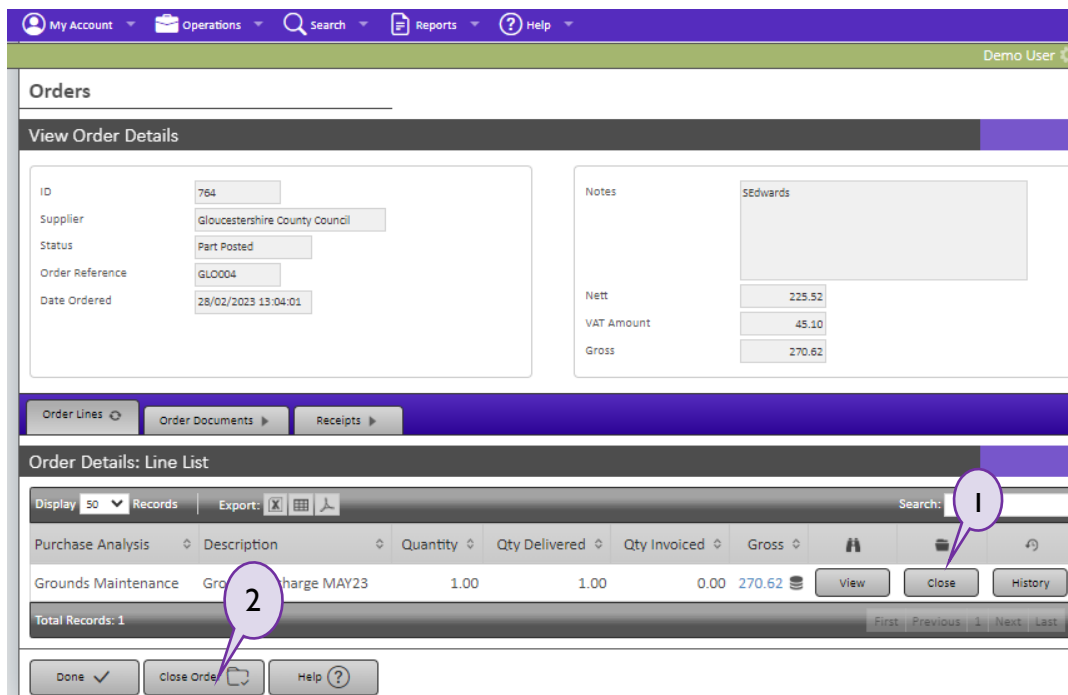

Step	Description
1	Enter the purchase order number if known.

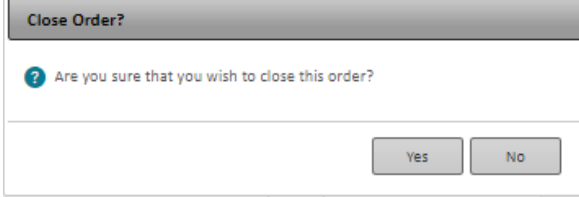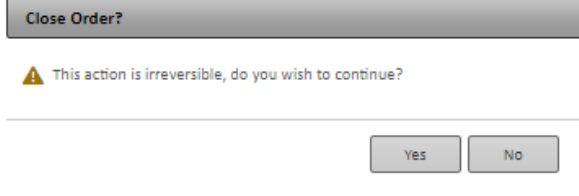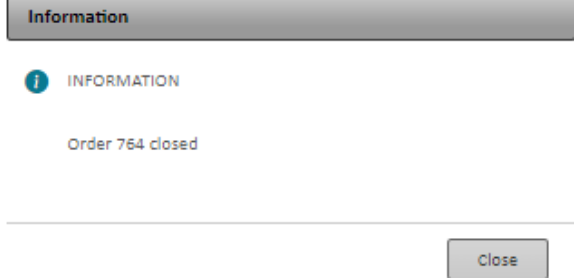| Step	Description
2	If the purchase order is not recent, change or remove the Min Modified Date, otherwise no data will be extracted.
3	If the purchase order number is not known, a search could be performed at supplier level.
4	If the purchase order number is not known, a search could be performed at entry user level, i.e. the person who created the initial request.
5	[Search] for the results. If no results are found click [New Search] to retry.
6	[View] the order details to review if this is the purchase order to be closed.

1.3. Closing the order

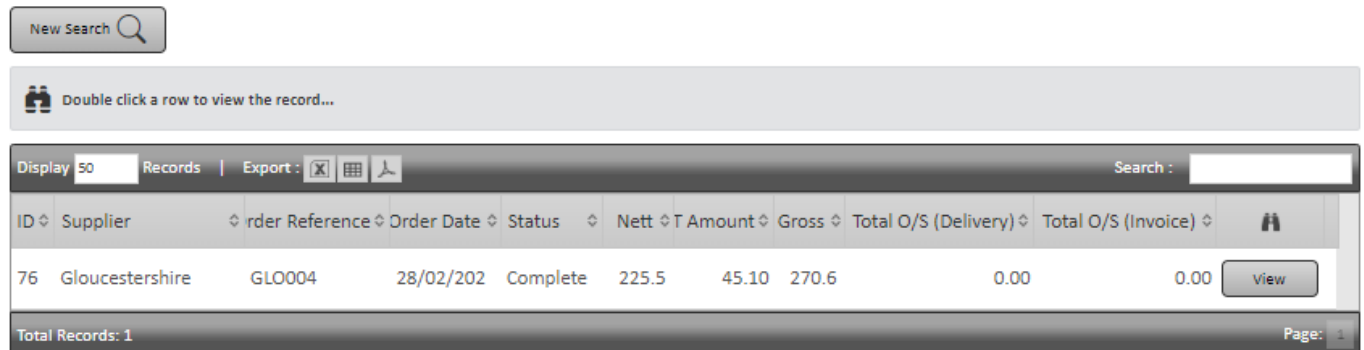| Step	Description
1	Review the order. If the order has multiple lines, then a single line could be closed.
2	If this order is to be closed in full select the [Close Order] button.

Step		Description
3	**Close Order?** ❓ Are you sure that you wish to close this order? [Yes] [No]	Once selected you will be requested to confirm that you want to close the order. Select [Yes] to continue.
4	**Close Order?** ⚠ This action is irreversible, do you wish to continue? [Yes] [No]	A second confirmation will be sought once yes has been selected. Select [Yes] to continue.
5	**Information** ℹ INFORMATION Order 764 closed [Close]	Information stating that the order has been closed in the final stage. [Close] to complete the process.

1.4. Viewing the closed order

Closed orders can be viewed. From the same menu searching on the order shows the below. [View] the order
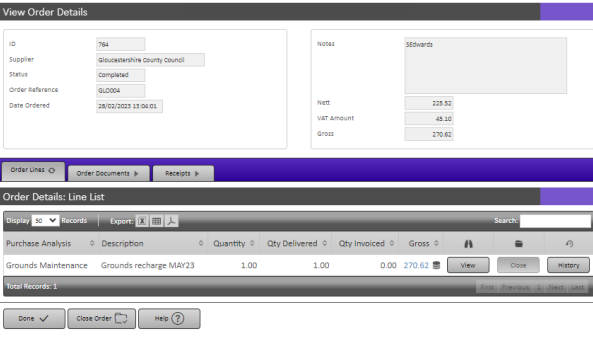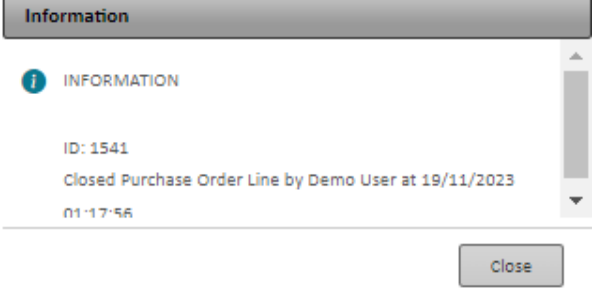
Search Orders

Order List

New Search 🔍

🔭 Double click a row to view the record...

ID	Supplier	Order Reference	Order Date	Status	Nett	T Amount	Gross	Total O/S (Delivery)	Total O/S (Invoice)	
76	Gloucestershire	GLO004	28/02/202	Complete	225.5	45.10	270.6	0.00	0.00	View

Total Records: 1   Page:

Step	Description
1	[View] the order.

Step	Description	
2		To see the closed information, click on the [History] button.
3		The [History] shows that the order has been closed. [Close] to return to the main screen.