Last Reviewed: 17 November 2023



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.

I.I. Menu

Search – Purchase Requests/Orders – Purchase Orders

🔍 My Account 🔹 🚔 Operations 🔹	Q Search 🔹 📄 Reports	•	? Help -
Search Orders	Customers / Suppliers		
New Search	Stock Items		
	Price Items		
Q Nominal Account	X Projects		Exclude Cor
Nominal Account Description	Purchase Requests / Orders		Purchase Requests
Organisation	Purchase Invoices		Purchase Orders
Cost Centre	Eq		EQ

Access the purchase order from the order enquiry menu.

I.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.

🝳 My Account 👻 🖻	Operations 🔻 📿 Search 🔻	Reports 🔻	? Help 🔹		
					Demo User 🌼
Search Orders		_			
New Search					
Q Nominal Account				Exclude Completed	
Nominal Account Description				Exclude Uncompleted	
Organisation Cost Centre	×			Exclude Fully Delivered	
Analysis	- () ·		4	Exclude Invoiced	
Funding Stream Entry User	, v			Exclude Paid	
Order No.	764		3)	Exclude Non Paid	
Q Supplier				Exclude Sent Documents	
Supplier Name Project	2			Exclude Unsent Documents	
Max M dified Date	21/08/2025				
Search Q R	leset 🖒 Clear 🖌				

Step	Description	
I	Enter the purchase order number if known.	

Last Reviewed: 17 November 2023



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.					
	🕒 My Account * 🔤 Operations * 📿 Search * 😰 Reports * 🕐 Help *					
	Search Orders					
	Order List					
	New Search Q					
	Double click a row to view the record					
	Display 50 Records Export: 🕅 🛄 📐 Search:					
	100 Supplier Order Reterence © proer Vate © Status Nett © I Amount © Gross © Iotal U/S (Delivery) © Iotal U/S (Invoice) © Interview 76 Gloucestershire County GLO004 28/02/202 Part 225.5 45.10 270.6 0.00 225.52 View					
	Total Records: 1 Page: 1					
6	[View] the order details to review if this is the purchase order to be closed.					

I.3. Closing the order

My Account 🔻 🍷	Operations 🔻	Q Search 🔻	F Reports 🔻	(?) Help 🔻						
										Demo User
Orders			_							
/iew Order Deta	ils									
ID	764				Notes		SEdwards			
Supplier	Gloucestershire	County Council								
Status	Part Posted									
Order Reference	GL0004									
Date Ordered	28/02/2023 13	04:01			Nett		225.5	12		
					VAT A	mount	45.1	.0		
					Gross		270.8	12		
			_							
Order Lines O	Order Documents 🕨	Receipts 🕨								
rder Details: Lir	ne List									_
)isplay <mark>50 🗸</mark> Recor	rds Export:	国人	_	_	-	_	_	_	Search:	
urchase Analysis	Description	n ¢	Quantity 🗘	Qty Delivere	ed 🌣	Qty Invoiced 🜣	Gross 🗘	А	•/	Ð
Grounds Maintenan		harge MAY23	1.00		1.00	0.00	270.62 🛢	View	Close	History
otal Records: 1			_	_	-	_	_	Fir	rst Previous 1	Next Last
Done 🗸 🛛	Close Orde	Help (?)								

Step	Description
I	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.

Last Reviewed: 17 November 2023



Step	Desc	ription
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 INFORMATION Order 764 closed Close	Information stating that the order has been closed in the final stage. [Close] to complete the process.

I.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 Q									
Double click a row to view the real	cord								
Display 50 Records Export	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	_	-	_	-		Search :		
ID ≎ Supplier ≎rder F	Reference 🌣 Order Date 🌣	Status 🗘	Nett 🌣 T	Amount ≎	Gross ≎	Total O/S (Delivery) 🗘	Total O/S (Invoice) 🗘	Ä	
76 Gloucestershire GLOO	004 28/02/202	Complete	225.5	45.10	270.6	0.00	0.00	View	
Total Records: 1	_	_	-	_	-	_	_	Page:	1
C ton			D		•				

Step	Description
I	[View] the order.

Last Reviewed: 17 November 2023



Step	Descr	iption
2	Orders	
	View Order Details	—
	0 74 Nota: 356wpt 50pfar securativity during clund 74m ompseud Order Adhrence 60004 Drift Ordered 3x100/2023 33 64. Nett 223 32. Uit Answer 43.9	I o see the closed information, click on the [History] button.
	Order Units O Order Socuments b Recepts b Order Obtailet Line List Search Purchase Analysis O Description Quantity O Grounds Maintenance Grounds recharge MAV33 1.00 1.00 Total Kootes: Free (Previous) & literal Liter	
3		The [History] shows that the order has been closed.
	ID: 1541 Closed Purchase Order Line by Demo User at 19/11/2023 01:17:56 Close	[Close] to return to the main screen.