PO and Invoice Review Prior to PO Closure

Reviews to accomplish prior to PO closure.

1. **Look at PO**
   - Find the PO via quick search (toolbar) or document search. Then click on the PO to open.

2. **Invoice Tab**
   - Click on the invoices tab to begin reviewing.

3. **Payment Status**
   - If any invoices are Payable the PO should remain open.
   - If all invoices have been paid move to next review step.

4. **Open vs Net Invoiced**
   - Are all funds **Net Invoiced** (fully invoiced/spent). PO may be ready for closure.
   - Are there any Open funds (not yet invoiced/spent).
   - Move to next review step.

5. **Outstanding invoices or credits?**
   - Are there any further invoices which are expected to come from the supplier? If yes, leave the PO open.
   - No further invoices or credits and all invoices are fully paid then Close the PO.

6. **Close PO**
   - When all invoices have been paid and there aren’t any outstanding Invoices nor credit memos the PO is now ready for closure.

***NOTE: PO’s invoiced to the penny will close automatically***

When the PO is ready to close then click the options dots on the PO and click Close PO. Do **not** click Cancel.