Before you close a PO in UShop, be sure that all applicable invoices and credit memos have been applied to it. Accounts Payable cannot make payments on or apply credits to a closed PO.

1. Document Actions

On the PO in question, open the Document Actions menu and select Close PO.

2. Add Note

Explain why the PO is being closed.

This documentation is a crucial step in the process.

3. Documentation in Comments

The explanation is included in the PO’s Comments and will document the reason for the close, the date and the name of the person who took that action.

4. Re-open PO

A PO should only be closed if you are confident that it is no longer needed. To open a closed PO you must contact the Purchasing Department. They will discuss with you whether this action is appropriate for the PO in question.