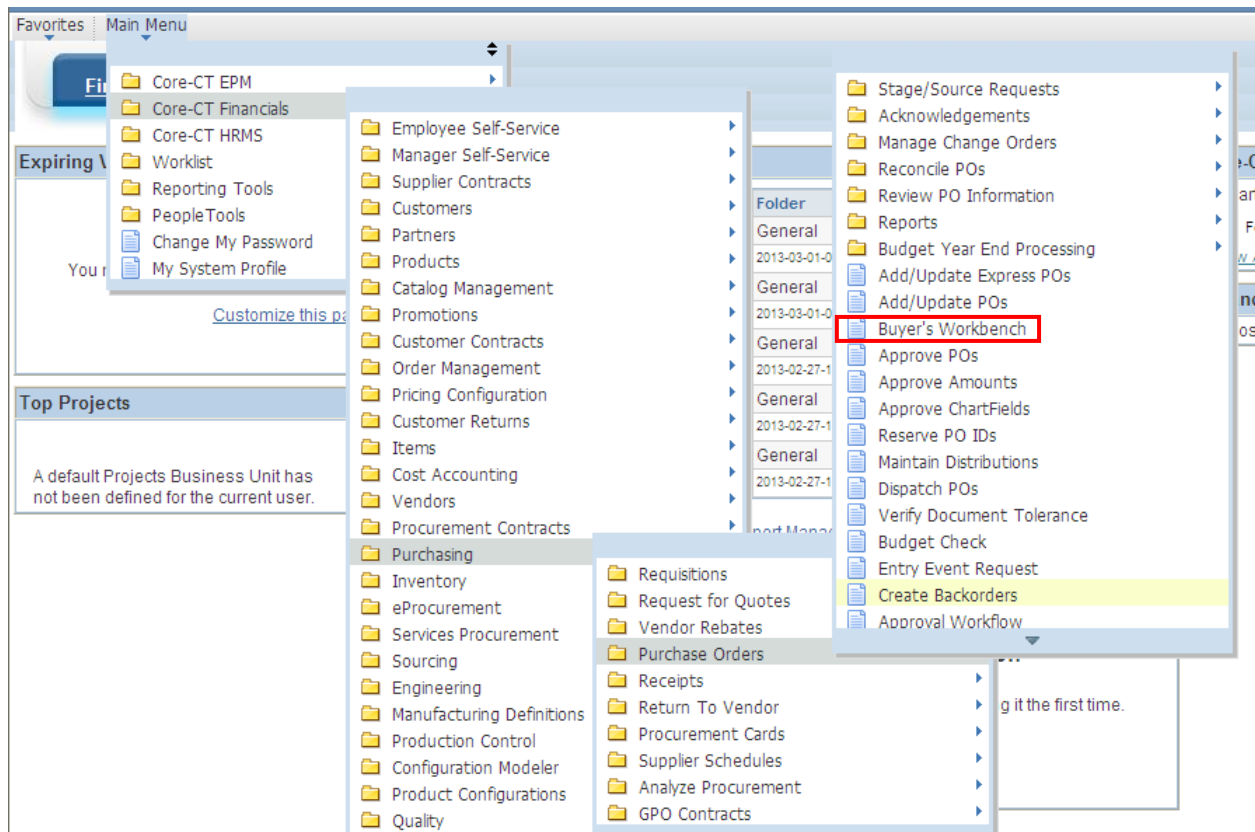


Close a Line on a PO through the Buyer's Workbench

Closing a single line on a PO without closing the entire PO can be performed via Buyer's Workbench in the Purchasing module.

Navigation: **Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Buyer's Workbench**



Close a Line on a PO through the Buyer's Workbench

If this is the first time you are closing a PO line, you will need to create a new run control ID. Click [Add a New Value](#) and enter in a WorkBench ID. Click [Add](#).

Buyer's WorkBench

[Find an Existing Value](#) | [Add a New Value](#)

Business Unit:

WorkBench ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Anytime you run it afterwards, you can search for and existing value.

Buyer's WorkBench

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Search Criteria

Business Unit: =

WorkBench ID: begins with

Description: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First Last

Business Unit	WorkBench ID	Description
DOTM1	PO_CLOSE	Close PO

[Find an Existing Value](#) | [Add a New Value](#)

Close a Line on a PO through the Buyer's Workbench

Enter the Purchase Order and click .

Buyer's WorkBench

Filter Options

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
Description: Close PO

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

Purchase Order:	<input type="text" value="0000115505"/>	To:	<input type="text" value="0000063111"/>
PO Date:	<input type="text"/>	To:	<input type="text"/>
Activity Date:	<input type="text"/>	To:	<input type="text"/>
Due Date:	<input type="text"/>	To:	<input type="text"/>
Request BU:	<input type="text"/>	Requisition ID:	<input type="text"/>
Vendor ID:	<input type="text"/>		
Item ID:	<input type="text"/>		
Buyer:	<input type="text"/>		
Contract SetID:	<input type="text"/>	Contract Version:	<input type="text"/>
Contract ID:	<input type="text"/>		
Release Number:	<input type="text"/>		
GPO ID:	<input type="text"/>		
GPO Contract:	<input type="text"/>		

Status

Open Pending Appr Approved
 Dispatched Cancelled Include Closed

Receiving

Recv Reqd:

All Not Received Partially Received Fully Received

Matching

Required Not Required
 All None Partial Match Fully Matched

Encumbrance

Open Encumbrances

ChartFields Personalize | Find | View All | First 1 of 1 Last

GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud F
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

 [Return to Buyer's WorkBench](#)


Close a Line on a PO through the Buyer's Workbench

Select the box before the PO number and then click the Lines icon  .

Buyer's WorkBench

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 *Description: Close PO

Select POs for Further Processing

List of Purchase Orders											
Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> PO Number			N								

Select All Clear All

Action:

Go To: [Set filter options](#) [Process Request Options](#)
[Process Monitor](#) [View Processing Results](#)

Click [Clear All](#) and then check the specific line number that you want to close.
 Click [Return to Buyer's WorkBench](#) when you are done.

Buyer's WorkBench

Purchase Order Lines

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 Description: Close PO
 Purchase Order: 0000115505

Select POs for Further Processing

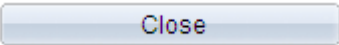
List of Purchase Order Lines							
Line	Status	Item ID	Description	Category ID	Recv Reqd	RFQ ID	RFQ Line
<input checked="" type="checkbox"/> 1	Approved		Copy Paper	00051	Y		
<input type="checkbox"/> 2	Approved		Address Labels	00051	Y		

Select All Clear All

[Return to Buyer's WorkBench](#)

Close a Line on a PO through the Buyer's Workbench

Select the line and click



Buyer's WorkBench

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 *Description: Close PO

Select POs for Further Processing

Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 000115505		Dispatched	N	02/13/2013	03/01/2013	0000010009	DOT-TURBERT Julie	Standard			

Select All Clear All

Action:

Go To: [Set filter options](#) [Process Request Options](#)
[Process Monitor](#) [View Processing Results](#)

You will then be able to view the Processing Results. The PO will either be in the Non-Qualified or Qualified. In this case, the PO appears on the Non-qualified side. Click to see why.

Buyer's WorkBench

Processing Results

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 *Description: Close PO

Select POs for Further Processing

Accounting Date for Action: 03/01/2013

Update Budget Date Equal to Accounting Date

Not Qualified	
PO ID	Log
<input type="checkbox"/> 0000115505	<input checked="" type="button" value="Log"/>

Qualified			
PO ID	Line	Sched	Distrib Line

Select All Clear All

Proceed: [Return to Buyer's WorkBench](#)

Close a Line on a PO through the Buyer's Workbench

Click and you will return to the previous page.

Buyer's WorkBench

Purchase Order Logs

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 Description:
 PO Number: 0000115505

Log			
Line	Sched	Dist	Message Text
1	1		The Purchase Order may not be closed because it has not been fully Matched.

Select the PO and click on the arrow in the middle which will move the PO to the qualified side. To proceed, click .

Buyer's WorkBench

Processing Results

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 *Description:

Select POs for Further Processing

Accounting Date for Action:

Update Budget Date Equal to Accounting Date

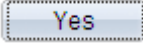
Not Qualified		
PO ID	Log	
<input type="checkbox"/>	<input type="button" value="▶"/>	

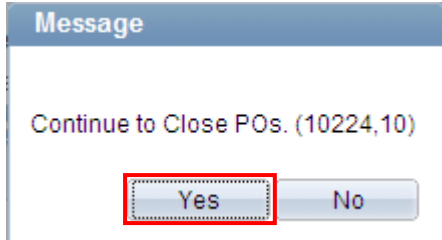
Qualified			
PO ID	Line	Sched	Distrib Line
0000115505	1		

Select All Clear All

Proceed: [Return to Buyer's WorkBench](#)


Close a Line on a PO through the Buyer's Workbench

You will get a pop up window asking if you want to continue. Click .



You will be returned to the workbench screen.

Depending on the resources available, closing may take a while.


To verify that the line was closed, click the Lines icon .

Buyer's WorkBench

Business Unit: DOTM1 WorkBench ID: PO_CLOSE

*Description:

Select POs for Further Processing

List of Purchase Orders											
Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 0000115505		Dispatched	N	02/13/2013	03/01/2013	0000010009	DOT-TURBERT Julie	Standard			

Select All Clear All

Action:

Go To: [Set filter options](#) [Process Request Options](#)
[Process Monitor](#) [View Processing Results](#)

Close a Line on a PO through the Buyer's Workbench

Line 1 of this PO is now closed.

Buyer's WorkBench

Purchase Order Lines

Business Unit: DOTM1 WorkBench ID: PO_CLOSE
 Description: Close PO
 Purchase Order: 0000115505

Select POs for Further Processing

Line	Status	Item ID	Description	Category ID	Recv Reqd	RFQ ID	RFQ Line
<input checked="" type="checkbox"/> 1	Closed		Copy Paper	00051	Y		
<input type="checkbox"/> 2	Approved		Address Labels	00051	Y		

Select All Clear All

[Return to Buyer's WorkBench](#)

You can also go back to Add/Update PO's to confirm that the line item was closed.
 NOTE: The PO is now awaiting Budget Check

Purchase Order

Business Unit: DOTM1 PO ID: 0000115505 PO Status: Dispatched Budget Status: Not Chkd

Copy From:

Hold From Further Processing

Header

*PO Date: 02/13/2013 Vendor Search
 *Vendor: 061043422F-001 Vendor Details
 *Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 *Buyer: TurberJ DOT-TURBERT Julie
 PO Reference: DASM1 0000000305

Backorder Status: Not Backordered Create BackOrder
 Receipt Status: Partial
 *Dispatch Method: Print Dispatch

Amount Summary

Merchandise:	8,500.00	
Freight/Tax/Misc.:	0.00	Calculate
Total Amount:	8,500.00	USD
Encumbrance	8,500.00	USD
Balance:		
Total PO Obligation:	36500.000	USD

Add Items From
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Select Lines To Display
 Line: To: Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Copy Paper	200.0000	CT	44000000	40.00000	8,000.00	Closed
2		Address Labels	50.0000	BX	44000000	10.00000	500.00	Approved