

One Council

Quick Reference Guide

SUPPLY CHAIN

Finalise order lines on a Purchase Order



Need help? Ask for your friendly Change Champion

Overview

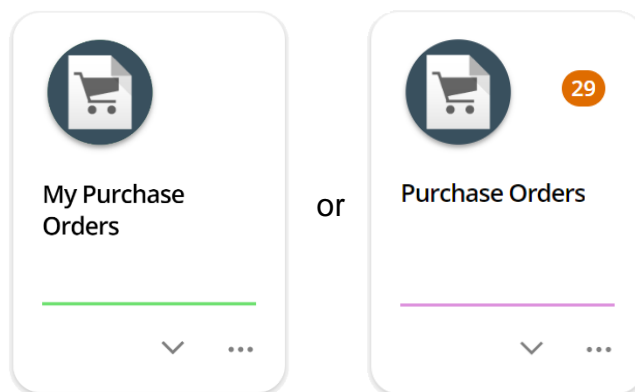
To finalise the lines on a Purchase Order if funds are no longer required.



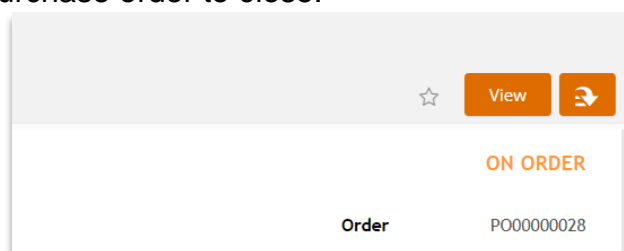
You cannot close an order that has receipts that are in progress or have not been invoice matched.

Launch My Purchase Orders

- ① Launch function:
 - **My Purchase Orders** or **Purchase Orders** (if the order was raised by someone else)

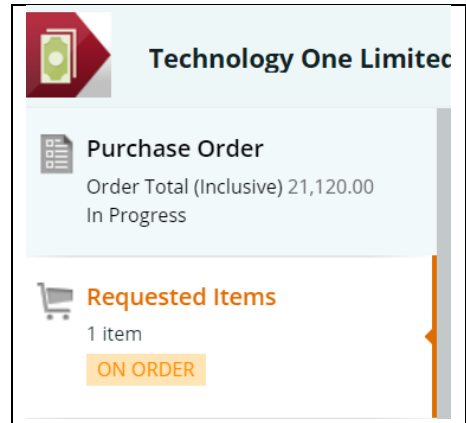


- ② Use the search capabilities to find the purchase order to close:
 - Select the **purchase order**
 - Select **View**



③

- Select Requested Items



④

- Select **Outstanding Order Lines**

Requested Items



Requested Items

Outstanding Order Lines

Outstanding Receipt Lines

⑤

- Select **the tick box** of the line(s) you want to finalise and click **Finalise order lines**



1 SELECTED
Finalise order lines
< 1 - 1 of 1 record.

	Order Line	Description	Goods/Service	Invoice Match
<input checked="" type="checkbox"/>	1	Hypercare B...	Goods	Receipt required

⑥

- A warning message will pop up to check if you are sure you want to finalise the selected lines.
- Select ok

Confirm Action ✕

Are you sure you want to finalise the selected order lines? This will create an order amendment and will clear the outstanding receipt amounts.

For order lines that require a receipt - The order amount will be set to match the receipted amount and outstanding amounts are cleared.
 For order lines that do not require a receipt - The order amount will be set to match the invoiced amount and the outstanding order amounts are cleared.

⑦

- Your purchase order will now move to an amended status.

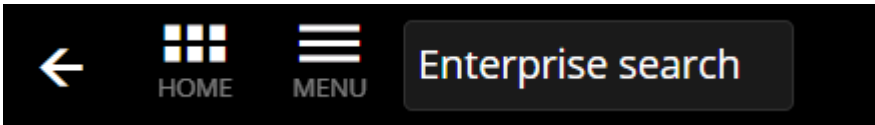
PURCHASE ORDER AMEND

Technology One Limited
Level 11, TechnologyOne HQ

Order Reference
PO00000227

⑧

- Select the back arrow



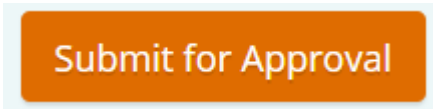
⑨

- Select View Order amendment



⑩

- Select Submit for Approval



⑪

- Complete the Assign to and provide comments.
- Select ok

Submit for Approval

This will complete the current task Create Amendment. The next task is: Approve Amendment

Assign To *
This field requires a value

Comments
Remaining funds no longer required. Please approve the amendment to enable me to close this PO.



OK Cancel

12

- You will receive a notification once the amendment is approved. The remaining order lines are now removed from the PO.

Requested Items

Requested Items **Outstanding Order Lines** Outstanding Receipt Lines

  > No records found.

Order Line	Description	Goods/Service	Invoice Match	Order Amount (Inclusive)	Order Unit
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