Closing Purchase Orders

Use this guide to review invoices, check access, and close purchase orders for Academic or Miller School of Medicine.

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1. **Invoices** - Be advised, once a purchase order is closed, additional invoices will need to be paid from a different purchase order.
   - Check the requisition’s **Balances** tab to confirm the Commitment Amount Remaining is $0.
   
   **TIP:** If a line item was cancelled by either the department or the supplier, an amount may appear, but the PO can still be closed.

   ![Balances Image]

   - Contact the supplier to confirm all invoices for this purchase order have been paid.

2. **Access** – Only users with the Workday security role *Department Procurement Data Entry Specialist* can close a purchase order. To view the list of users with access:
   - Scroll down to the Goods/Services Lines and click the Cost Center number.
   - Click the **Roles** tab.

   ![Roles Image]
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c. Scroll down to the *Department Procurement Data Entry Specialist* role. The employees listed have access to close this purchase order.

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**Closing a PO**

<table>
<thead>
<tr>
<th>a. Search for the purchase order.</th>
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| 4. Click the related actions button, hover over *Purchase Order* and select **Close**.  

**TIP:** If the *Close* option does not appear and you have been granted the **PDES security role**, contact **Accounts Payable** to confirm if there are any pending Receive Requests or if there is a draft invoice that needs to be processed or canceled. |  |
| 4. Review the details and confirm this is the correct purchase order. Then click **OK**. |  |

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For assistance, contact the PurchasingHelpDesk@miami.edu