PO-15 PO Buyer Close

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Close a PO in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of closing a PO in NCFS.

1. If a PO is fully received in eProcurement, it will be interfaced into NCFS and closed automatically as soon as the received amount is fully invoiced and paid.
2. If the most recent receipt in eProcurement is marked as “Close PO”, it will be interfaced into NCFS and close the PO for receiving. Marking the Close PO checkbox in eProcurement without a receipt will not send the PO Close request to NCFS.
3. If the PO is required to be closed before being received/billed in full, then the PO Buyer Close role will have to manually close it.

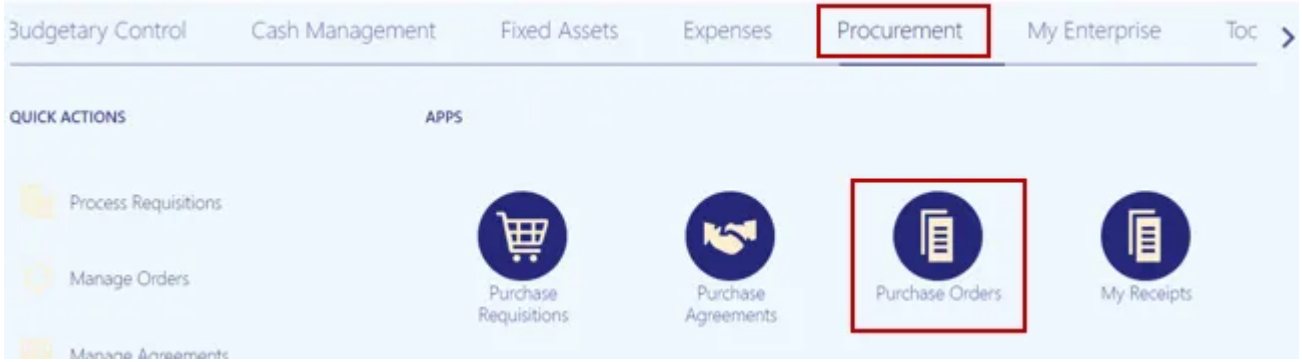
Close PO

To close a PO, please follow the steps below. There are 8 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

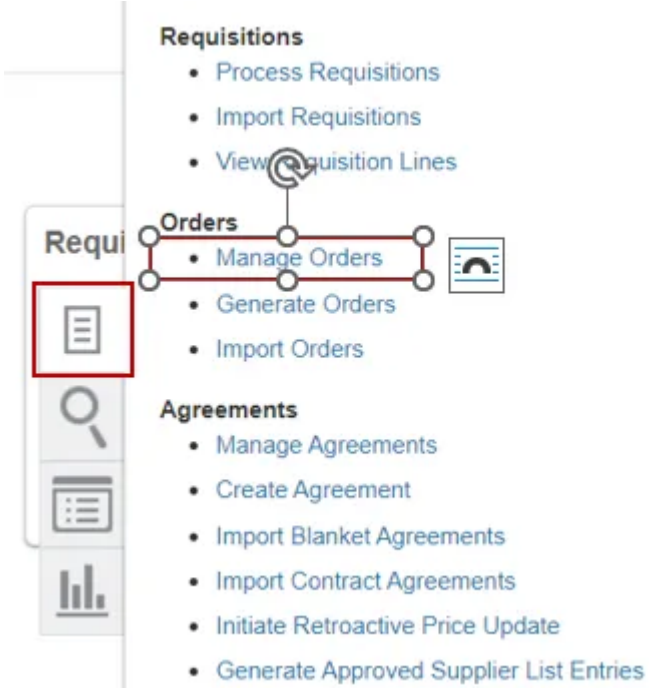
Step 2. On the **Home** page, click the **Procurement** tab and select the **Purchase Orders** app.

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Step 3. Click the **Task** panel and select **Manage Orders**.

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Step 4. The **Manage Orders** page opens. Using the search criteria, search for the purchase order you want to close. Click **Search** button.

Note: **Delete the defaulting Buyer name before searching**.

Image



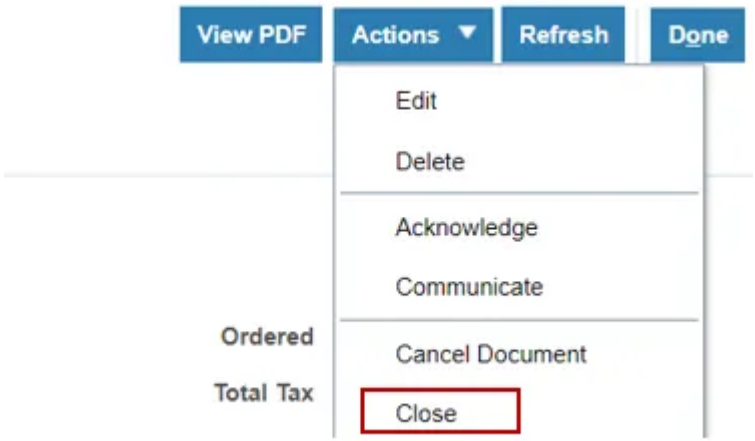
Step 5. The PO you searched for will be displayed. Click on the **Order** number link to view the PO.

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Step 6. To finally close the PO, click on the **Action** dropdown and select **Close**.

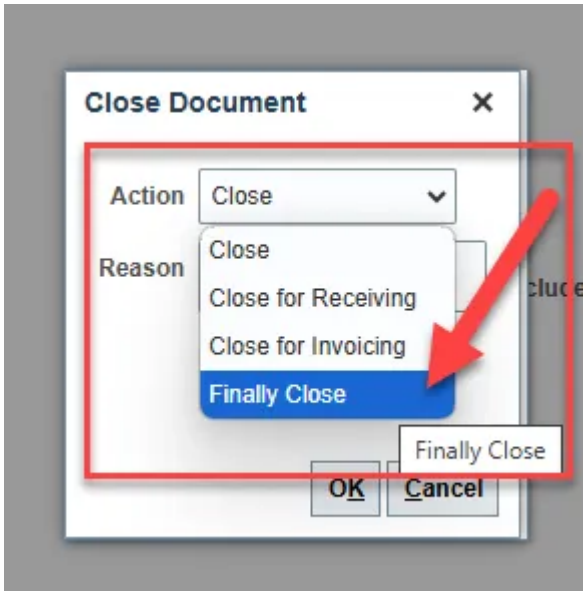
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Step 7. Close Document window will be displayed, click on the **Action** dropdown and select **Finally Close** and enter an appropriate reason for finally closing the PO. Click **OK**.

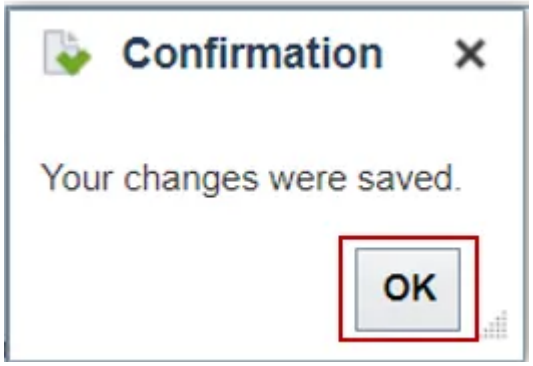
Note: Using Close instead of Finally Close will leave remaining obligations on POs that are not fully liquidated. During the year-end PO budget carryforward process, any POs in a closed, but not fully liquidated, status will be re-opened in NCFS. However, change orders made in eProcurement on POs in a Finally Closed status will fail when interfacing into NCFS.

Image



Step 8. You will receive a confirmation message, click **OK**. Click **Done** on the Purchase Order page.

Image



Wrap-Up

Close PO by using the steps above.

Additional Resources

- Web-Based Training (WBT)
  - PO108: PO Buyer Close

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