

PO.060.020 – INQUIRING ON PO ACTIVITY SUMMARY

Purpose	<ul style="list-style-type: none"> To identify the information on the PO Activity Summary page. To access the Activity Summary page for a Purchase Order.
Description	The PO Activity Summary page contains receiving, invoicing, and matching information for any Purchase Order in the system.
Security Role	BOR_PO_INQUIRY
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to review the activity summary on a Purchase Order.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Review PO Information link.
6.	Click the Activity Summary link.
7.	Enter or search for the purchase order ID in the PO Number field.
8.	Click the Search button.
9.	Users can review information on each tab individually or view the information on all the tabs by clicking the Expand All arrow.
10.	To review the Purchase Order Line details, click the Details tab. Here users can review the following information: <ul style="list-style-type: none"> • Line • Line Details icon • Item • Item Description • UOM • Order Qty • Amount Ordered • If the Amount Only checkbox is checked
11.	To view the receiving details for the item(s), click the Receipt tab. Users can review the following information: <ul style="list-style-type: none"> • UOM • Amount Received • Open Quantity • Open Amount

Step	Action
12.	<p>To view the invoice information, click the Invoice tab. Here users can review the following information:</p> <ul style="list-style-type: none"> • UOM • Quantity Invoiced • Amount Invoiced • Un-invoiced Amount • Invoice
13.	<p>To view details about the matching status of the selected PO, click the Matched tab. Users can review the following information:</p> <ul style="list-style-type: none"> • Qty Matched: field displays the quantity of the line that has been matched. • Amt Matched: field displays the amount of the line that has been matched.
14.	<p>GeorgiaFIRST Financials model does not use the RTV functionality, so this tab can be ignored.</p>