ELAWARE EXCHANGE

Closing & Canceling Purchase Orders (PO) Revised 2/19/2024



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General Guidelines

Closing or Canceling a PO releases the obligated funds when a PO has not and will not be fully invoiced or fulfilled.

Closing or Canceling a PO is **NOT** completed via a Change Request.

A request to Close or Cancel **IS** initiated by adding a comment to the PO addressed to Procurement Help.

• Additional steps may be required and are outlined in this guide.

Like all revisions to POs, closures and cancelations **must** be initiated on the PO itself in UD Exchange.

Procurement staff cannot modify any UDX document as a response to an email or a help ticket addressed to procurement@udel.edu



Closing vs. Canceling – What's the Difference?

REQUEST TO CLOSE A PO:	When your PO has a remaining balance, but no
	more invoices are expected, and you need to
	release the obligation on your funding source(s).

REQUEST TO CANCEL A PO: When you no longer need the goods or services ordered.

Closed POs can be reopened, Canceled POs cannot be restored.

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Before you CLOSE a Purchase Order...

Purchase orders will automatically close when they have been fully invoiced.

- Once an order has been fully invoiced, it enters **Soft Close** status.
- During the 15-day Soft Close period, the PO can still be reopened to allow any credits from the supplier to be posted.
- When the Soft Close period has ended, the PO is considered fully closed, enters **Closed** status, and updates in PeopleSoft.

If a PO has **not** been fully invoiced and needs to be Closed to release the obligation in PeopleSoft/UDataGlance, you can add a Comment to the PO addressed to Procurement Help.

PO Comments to Close a Purchase Order are most commonly requested for Blanket Purchase Orders (UDB).



	Purchase Order CLOSE Processes										
	CATALOG ORDERS	NON-CATALOG ORDERS									
UDS/QUANTITY-BASED PO	Add a PO Comment addressed to Procurement Help asking the system administrator to close the PO. Attach documentation that the supplier has communicated to you that the remainder of the order will not be fulfilled or that there will be no further invoices (e.g., email from the supplier).	Add a PO Comment addressed to Procurement Help asking the system administrator to close the PO. The Comment must include the reason that there will be no further invoices received.									
UDB/AMOUNT-BASED PO	N/A - No Catalog orders should ever be set up as a UDB/Amount-based PO (i.e., the multi- invoice box should never be checked when you are creating a Catalog order).	Add a PO Comment addressed to Procurement Help asking the system administrator to close the PO. The Comment must include the reason that there will be no further invoices received.									

NOTE: POs cannot be closed until all vouchers are paid.

- If any voucher is in "In Process" or in "Payable" status, your PO will be Soft Closed instead.
- It will automatically move to Closed 15 days after the invoice pays.





I want to Close a Purchase Order: Blanket POs

PO Close requests are most frequently used for a blanket purchase order.

• For example, a PO was created for a blanket dollar amount because the user did not know precisely how much a repair would cost, or how long the supplier's services would be engaged.

Blanket purchase orders can be Closed with a PO Comment to Procurement Help once the user determines that all invoices have been paid.





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I want to Close a Purchase Order: Standard POs

- Standard purchase orders should be set up by quantity the order would be precise as to what quantities we are ordering, and once that line's quantity is invoiced, the line is Closed.
- A standard purchase order Closes once all quantities have been invoiced, regardless of price.
- Close requests for standard purchase orders should include a reason why we are not going to fully pay for all items ordered, such as a notification of unavailability from the supplier.
- For catalog orders, you MUST attach documentation that you have already communicated with the supplier.



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Type a comment requesting closure of the purchase order once the Procurement Help email address is checked. Attach documentation using **Choose File**.

Click Add comment.

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Purchase Order CANCEL Processes

	CATALOG ORDERS	NON-CATALOG ORDERS
LINE ITEMS	 Because Catalog suppliers are not set up to receive updates from UD Exchange once an order has been dispatched, you must contact the supplier directly to arrange a cancellation. After you have contacted the supplier to cancel the items and have received confirmation of the cancellation, add a PO Comment addressed to Procurement Help asking the system administrator to cancel the specific line items. Attach the documentation that un-invoiced items were canceled with/by the supplier. 	 Non-Catalog orders can be updated, and the changes can be sent to the supplier. Add a PO Comment addressed to Procurement Help asking the system administrator to cancel the specific line items. The Comment must include the exact verbiage/message you want sent to the supplier to explain the cancellation in quotations. A revision of the order will be sent to the supplier from UD Exchange.
FULL ORDER	 Because Catalog suppliers are not set up to receive updates from UD Exchange once an order has been dispatched, you must contact the supplier directly to arrange a cancellation. After you have contacted the supplier to cancel the order and have received confirmation of the cancellation, add a PO Comment addressed to Procurement Help asking the system administrator to cancel the PO. Attach the documentation that the order was Canceled with/by the supplier. 	 Non-Catalog orders can be updated, and the changes can be sent to the supplier. Add a PO Comment addressed to Procurement Help asking the system administrator to cancel the The Comment must include the exact verbiage/message you want sent to the supplier to explain the cancellation in quotations. A revision of the order will be sent to the supplier from UD Exchange.



I Want to CANCEL a PO

IMPORTANT: We cannot cancel entire Purchase Orders via change request because documents route for approval based on the total dollar amount.

Requisitions and change requests are routed to various approvers based on dollar amount. If the dollar amount is zero, the system would not know where to route a zero dollar request.

In the *attempted* change request below, you can see that for a zero dollar change request, it will not route to an approver.

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Proceed to Slide 17 for the correct process to cancel an entire PO



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atus Summary Revisions 1 Confirmations Shipme	nts Change Requests	Receipts Vouch	rs Comments	Attachments	History			
ecords found: 0			Show comr	nents for Purchase	Drder 🗸 +	Details	Completed	
ADD COMMENT					×	Supplier Status Sent To Supplier		
Please cancel PO. Supplier said the item will be backordered until July and I need items before then. Emailed them and they responded that they have canceled the order for me. Attaching cancel confirmation.	This will add a comment to the added to the document. Email notification(s) Add rec	he document. If you select a us cipient	r they will receive an email	ndicating that a comm	ent has been	Supplier W B MASON CO INC		
	Lauren Romeo (Prepare	ed by, Prepared for) <ud-mart@u< td=""><td>del.edu></td><td></td><td></td><td>Total (13.92 USD)</td><td></td><td></td></ud-mart@u<>	del.edu>			Total (13.92 USD)		
794 characters remaining expand I clear	Attach file (optional)	exchange@udel.edu>				Shipping, Handling, and each supplier. The valu budget checking, and v	Tax charges are calcul es shown here are for e rorkflow approvals.	ated and charged stimation purpos
	Attachment Type	File				Subtotal		1:
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						Requisition: 3726388		
	File	Choose File	UDX TEST.png			What's next?		
Type a comment requ	uesting cand	celation of t	he purcha	se orde				 Complet
 Include a reason for t Upload your docume 	the cancelat ntation of co	ion (e.g., ite ommunication	ems out o on with the	f stock). e supplie	er.			Ľ
Click the Check Mark to	Add comm	nent and se	nd the no	tification	to Proc	curement F	lelp.	Powered by JAGGAE
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I Want to Cancel a Catalog PO Line

- Canceling a Catalog order **line** is also done via a comment to Procurement Help
- Proceed to slide 21 for instructions.





EXCHANGE	TEST SITE	All 🔻	Search (Alt+Q)	3,000.00 USD 📜	♡ 🔊 🛺
Purchase Or	der • W B MASON CO INC • UDST001169 Revision 0		≡ 🖶 @	••• 1 of 1 Results	• < >
Status	Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers Comments Attachments	History			
Records fo	und: 0 Show comments for Purchase Order	+	Details	Completed	~
No comment	s have been added		Supplier Status		
l,			Sent To Supplier		
₽ (Cancelling a Catalog PO Line with a comment:		Supplier W B MASON CO INC		
u	Click the Commonts tab and click "+" to generate a new comment				
1			Shipping, Handling, and Ta each supplier. The values budget checking, and wor Subtotal	ix charges are calculated shown here are for estim (flow approvals.	and charged by ation purposes, 13.92 13.92 13.92
			Related Documents		~
			Requisition: 3726388		
			What's next?		~
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			Workflow		C 🖶
			Show skipped	steps	
a ,			Submitted 3/15/2023 4:32 P Lauren Romeo	N	
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EXCHANCE TEST SITE			All 🕶	Search (Alt+Q) 3,000.00 US	d 🛱 😞 🗖 🥻
urchase Order • W B MASON CO INC • UDSTO	01169 Revision 0	User Search		× = • • •	1 of 1 Results ▼ 〈 〉
Status Summary Revisions 1 Confir	mations Shipments Change Re	quests Receipts Last Name 🔹	help		
Records found: 0		First Name 🏾 🕚		Complete	d
				Details	~
ADD COMMENT		User Name 🌒		Supplier Status	
		Email 0		Sent To Supplier	
Click Add Recipient.	will add a co d to the docu	nment to the document. If you : ment		Supplier	
Type " Help " in the last	name field	s) Add recipient Department			
of the User Search win		eo (Prepared by, Prepared for) <	×	Total (13.92 USD)	~
of the User Search with	h file (option	al)		Shipping, Handling, and Tax charges a each supplier. The values shown here	re calculated and charged by are for estimation purposes,
Click Search .	hment Type	Fi Results Per Page	10 🗸	budget checking, and workflow approv	rals.
Salaat Braauramant H	ala from	0 4		Subtotal	13.92
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chase Order • W B MASON CO INC • UDST001169 Revisio	on 0				≡ ⊕	1 of 1 Res	sults 🔻 <
atus Summary Revisions 1 Confirmations (Shipments Change Requests	Receipts Vouchers	Comments	Attachments History			
ecords found: 0			Show commen	ts for Purchase Order 🗸	+ Details	Completed	
ADD COMMENT					Supplier Status Sent To Supplier		
Please Cancel Line 2. The items will be on backorder for 6 month and we r before then. Have confirmed cancellation with supplier. Email documentat attached.	This will add a comment to th added to the document. Email notification(s) Add rec	e document. If you select a user the	will receive an email indi	cating that a comment has been	Supplier W B MASON CO INC		
	Lauren Romeo (Prepareo	d by, Prepared for) <ud-mart@udel.ee< td=""><td>u></td><td></td><td>Total (13.92 USD)</td><td></td><td></td></ud-mart@udel.ee<>	u>		Total (13.92 USD)		
794 characters remaining expand	Attach file (optional)	«change@udel.edu>			Shipping, Handling, a each supplier. The va budget checking, an	nd Tax charges are calcul lues shown here are for e l workflow approvals.	ated and charge stimation purpo
	Attachment Type	File			Subtotal		1
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	File	Choose File	DX TEST.png		What's next?		
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 Include a reason fo Upload your docur 	or the cancelation of co	ion (e.g., iten mmunication	ns out of a with the	stock). supplier.			2
Click the Check Mark	to Add comm	ent and send	d the noti	fication to P	rocurement	Help.	Powered by JAGGA
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I Want to Cancel Non-Catalog PO Lines

- Canceling a *line* (*not* an entire order)on a non-catalog PO *should* be done on a change request.
- Proceed to slide 25 for instructions.





î	DEANARE EXCHANGE TEST SITE				All ▼ Se	earch (Alt+Q) Q 3,000.00 USD	a 💩 👘	2
	Purchase Order • DELWO	OOD TRAILER SALES INC • UDST000	680 Revision 5			≡ ··· 1 of 1	Results \checkmark \langle \rangle	
-	Status Summary	Revisions 6 Confirmations S	Shipments Change Requests 4	Receipts Vouchers 1 Comments 1	Attachments 2	History		
Ş	Records found: 4				+	Completed	~	
ī.	Status	Number	Owner	Created	_	Supplier Status		
<u>11</u>	Completed	3035629	Kristen Pickering	8/14/2020		Sent To Supplier		
-0	Completed	3035664	Kristen Pickering	8/14/2020		Supplier		
9	Completed	3035495	Kristen Pickering	8/14/2020		DELWOOD TRAILER SALES INC		
և	Completed	3045455	Kristen Pickering	9/1/2020		Total (17,010.00 USD)	~	
						Shipping, Handling, and Tax charges are ca	lculated and charged by	
						each supplier. The values shown here are f	or estimation purposes,	

To Create a Change Request in a PO:

Click the Change Requests tab.

Click **'+'** sign.

Sent to Supplier	
Supplier	
DELWOOD TRAILER SALES INC	
Total (17,010.00 USD)	\checkmark
Shipping, Handling, and Tax charges are calculated a	nd charged by
each supplier. The values shown here are for estimat	ion purposes,
budget checking, and workflow approvals.	
Subtotal	17,010.00
	17,010.00
Related Documents	~
Requisition: 3035622	•
Change Requests: 3045455	
Change Requests: 3035495	•
Change Requests: 3035664	•
Change Requests: 3035629	•
Voucher: 10000343	•
What's next?	~
Workflow Status	 Completed

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Status Sumn	nary Revisions 6 Confirmation	ons Shipments	Change Requests 4	Receipts	Vouchers 1	Comments 1	Attachments 2	History	Add Comment
Canarol Informatio	- ^	Chinaing Information	ion		Pilling (Dovrment		A 14		Create Change Request
	·····	Shipping informat	lon	<i>.</i>	billing/Payment		····· ·	Details	Cancel PO
PO/Reference No.	UDST000680	Ship To			Bill To			Supplier Status	Finalize Revision
Revision No.	5	University of Delawar	re		Accounts Pavable			Sopher Status	Create Quantity Receipt
Priority	Normal You may	also click	k the ellips i	is on th	e PO an	d select		Sent to Supplier	Print Fax Version
Supplier Name	DELWOOD TRAILER Croato C	hango P	oquest from	m tho m				Supplier	Send Test PO
	Ciedle C	папуе к	equest no		ienu.			DELWOOD TRAILE	Soft Close PO
Address	FELTON, Delaware 19943-5470 United States	United States			BillTo Address Code	BillTo		Total (17,010.00	Close PO
Purchase Order Date	8/14/2020	ShipTo Address Code	NC32		Billing Options			Shipping, Handling,	and Tax charges are calculated and charg
Total	17,010.00				Accounting Date	no value		each supplier. The budget checking, a	values shown here are for estimation purp nd workflow approvals.
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Purchasing Rusinose	LIOD01	Expedite	×		FOR	Destination			170
Unit	UNIVERSITY OF DELAWARE	Ship Via	Best Carrier-Best Way			Sectification			17,0
	×	Requested Delivery	no value					Related Documen	ts
Payment Term Override		Date						Requisition: 30356	22
Payment Term Override								Change Requests:	3045455
Payment Term Override eBuilder Process Instance	no value								0005405
Payment Term Override eBuilder Process Instance	no value							Change Requests: 3	3035495
Payment Term Override eBuilder Process Instance Multi- Invoice/Payment	no value							Change Requests: Change Requests: 3	3035664
Payment Term Override eBuilder Process Instance Multi- Invoice/Payment	no value							Change Requests: 3 Change Requests: 3 Change Requests: 3	3035664 3035629
Payment Term Override eBuilder Process Instance Multi- Invoice/Payment Contact Information	no value							Change Requests: 3 Change Requests: 3 Change Requests: 3 Voucher: 10000343	3035664 3035629







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-	Purchase Order • DELWOOD TRAILER SALES INC • UDST000680 Revision	Create Change Request X		≡ … [1 of 1 Results 👻 <
4	Status Summary Revisions 6 Confirmations Shipments	This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.	Attachments 2	History	
0	December formate &	Email notification(s) Add recipient	1	Complet	ed
AW	Records found: 4	Kristen L Pickering (Approved Requisition) <kpick@udel.edu></kpick@udel.edu>	+	Details	
Â	Status Number Own	Kristen Pickering (Prepared by) <ud-mart@udel.edu></ud-mart@udel.edu>		Supplier Status	
312	Completed 3035629 Kris	✓ Sam Shopper (Prepared for) <ud-mart@udel.edu></ud-mart@udel.edu>		Sent To Supplier	
	Completed 3035664 Kris	User with change request permission:		Supplier	
In	the Create Change Request Window:	Amy Drag (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		DELWOOD TRAILER SALES INC	
S	elect any Recipients from boxes or	Christian Aha (Approved) <ud-mart@udel.edu> Debbie Diversity (Approved) <bgonzal@udel.edu></bgonzal@udel.edu></ud-mart@udel.edu>		Total (17,010.00 USD) Shipping, Handling, and Tax charges a	are calculated and charged by
11	se the link to Add Recipients	Lauren Romeo (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		each supplier. The values shown here	are for estimation purposes,
	se the link to Add Recipients	Test Buyer (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		budget checking, and workflow appro	vals.
T۱	pe the Change Request Reason.	add email			
					17,010.0
A	tach a document if necessary.	Change Request Reason			
		Remove the service charge		Related Documents	~
C	ick Create Change Request.	943 characters remaining expand clear		Requisition: 3035622	0
		Attach file to this change request (optional):		Change Requests: 3045455	0
				Chapter Pequeste: 2025405	

Completed
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Change Requests: 3035664

Change Requests: 3035629

What's next?

Workflow Status

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File

O Link/URL

Create Change Request

Close

Attachment Type

E. EAGHANGE							
hange Requ	ests • 3787993					≣ ● 🖶 🛛 …	Assign Draft Submit
Summary	PO Preview External Communication	Comments 1 Attachmen	nts 2 History				
i Changes wil	I not be sent to the Supplier.					Be aware of these issues.	Draft
Change Reque	est Reason				<i>•</i> ~	You may review and proce	eed.
Reason	Remove the service charge					Total (16,990.00 USD) Shipping, Handling, and Tax	charges are calculated and char
General	ø ^{r.} · ·	Shipping	ø	Billing	ø v	each supplier. The values sho budget checking, and workflo	own here are for estimation purp ow approvals.
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Note The Prepared for	e the default setting supplier should rea	g in UDX is to N ceive the revise	NOT send PO ed PO, so clic	changes to the k the External	e supplier. Communica	ation tab.	16,
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Resend to	~		Draft	
Suppliers on Change Request		Be aware of these issu You may review and pr	es. oceed.	>
ERP System Connections on Change Request	То	tal (16,990.00 USD)		~
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		btotal		16,990.00
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Check the Suppliers on Change Request box to send the Do not uncheck the other two boxes.	ne revision to the supplier.	lated Documents rchase Order: UDST000 quisition: 3035622	1680	16,990.00 ~ ⊕ ⊕
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Change Requ	lest Reason						Subtotal		7,58
Reason	Remove the service charge								7,58
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General Return Will be Prepared by Prepared for Purchasing Business Unit eBuilder	Richard Requester Kristen Pickering UOD01 UNIVERSITY OF DELAWARE no value	mary tab, plier with 162 THE GREE HULLIHEN HA NEWARK, DE 1 United States Delivery Optic Expedite	you see tha the reason N LL 19716	at the char you entered ur Bi Ac	lling nge request ed. wark, DE 19716 ited States ling Options counting Date <i>no value</i>		Related Doc: Purchase Ord Requisitions: : What's next f Next Step Approvers Workflow	uments er: UDBT000092 3328084 for my order? Wait for Validation I There are no approv	Response vers □

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Questions:

• procurement@udel.edu

Resources:

Procurement Services Website



