Purchase Order Activity Summary

1) Begin by navigating to the Activity Summary page: NavBar > Menu > Financials > Purchasing > Purchase Orders > Review PO Information > Activity Summary.

2) From the PO Activity Summary search page, enter the PO Number to be viewed.

3) Click the Search button.

4) The Activity Summary page is displayed. This page displays the status of the purchase order (PO) and the total amount of the merchandise (receipt, returned and invoiced amount), receiving, invoicing, matching, and returning activities that have been performed on the selected PO.

Note, depending on how many line items are on the PO, it may be necessary for you to click the "View All" link or the "Show Next Row" button. In this example, all line items are displayed.

a. The Details section displays purchase order line item information.
b. The Receipt section displays receiving information. This section provides how many items have been received, accepted and the number of items still open for receipt.

To drill-down to Receipt information, scroll to the last column on the right and click the Receipt icon.

c. The Invoice section displays the items on the PO that have been invoiced.

To drill-down to payment voucher information, scroll to the last column on the right and click on the Invoice icon.

d. The Matched section displays the items that have gone through the matching process. The matching process is performed to ensure that the purchase order, the receiving document (if required), and the invoice all correspond.

To drill-down to view the vouchers to which the PO has been matched, scroll to the last column on the right and click on the Matching icon.

e. The RTV (Return to Vendor) section displays the items that have been returned to the vendor. This module is not used by UTA.