Closing a Purchase Order to Release Encumbrances

Overview
This guide will show you how to close a Purchase Order in myUF Marketplace and release encumbrances. Before myUF Marketplace, change orders were used to close POs; now closing POs is separate and easier to do. Use the dropdown on the top right of the PO, select Close and click the GO button. The system will close the PO, send to myUFL and the nightly process will budget check the PO, releasing any remaining encumbrances. Check the PO the next day in myUFL. It should show as Complete and Valid.

Navigation
Within myUFL, navigate to:
- Main Menu
- My Self Service
- myUF Marketplace

Process
1. Within your purchase order, click the tiny black triangle next to the PO number to view the dropdown. Click on Close PO.
2. In the Dialog Box, enter the reason for closing the PO, for example:

![Add Note dialog box](image)

Specify the reason for changing the A/P status to closed.

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<th>Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.</th>
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3. Click OK and it will show as (Closed).

![Purchase Order screenshot](image)
4. The PO will be budget checked at night and the encumbrance released then. The next day, check the PO in myUFL to make sure it is Complete and Budget Check is valid. To check it, go to Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.
   - Enter the PO Business Unit and the PO number.
   - The PO should be Complete and Valid.
   - If you need the PO reopened, contact the myUF Marketplace Help Desk the next day after closing, not the same day. It needs the nightly budget check to be Valid before it can be reopened.

Additional Assistance

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<tr>
<th>Marketplace Help Desk</th>
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<tbody>
<tr>
<td>Email: <a href="mailto:myUFMarketplace@ufl.edu">myUFMarketplace@ufl.edu</a></td>
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<td>Phone: (352) 392-1335</td>
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