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 closing the PO, go into myUFL, and finalize the last voucher paid. Then in myUF Marketplace, open the PO and click on the three dots on the top right of the PO, select Close and click the GO button. myUF Marketplace 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

Before closing the PO, finalize the last voucher in myUFL.

1. To find your last voucher, go to your PO in myUF Marketplace, and click on the Invoices tab to view your vouchers. The last one is at the top and should be Payable:

   ![Invoice Image](image-url)

   **Note:** If it is In Process, please wait until it gets through workflow and sent to myUFL, when it becomes Payable.
2. Go to Main Menu > Financials > Accounts Payable > Vouchers > Add Update > Regular Entry and click on the Find an Existing Value tab, then enter your voucher number and click Search:

![Voucher Search](image1)

3. Click on the Invoice Information tab, then click the pink Finalize Document box under the Documents button.

4. Make sure to Save and Budget Check.

![Invoice Information](image2)
5. Now return to myUF Marketplace, and within your purchase order, click the three dots (...) on the top right to view the dropdown. Click on Close PO.

![Purchase Order screenshot](image)

6. In the Dialog Box, enter the reason for closing the PO, for example:

![Add Note screenshot](image)
7. Click OK and it will show as (Closed).

myUF Marketplace will send the closed PO to myUFL which will budget check it overnight and release any encumbrances.

7. To check if your PO is closed in myUFL, go to Main Menu > Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. From there, enter your PO Business Unit and your PO number. PO Status = Compl and Budget Status = Valid

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