# iShopUTRGV™ *Quick Reference Guide*

## How to – Close a Purchase Order/Disencumber Funds

iShop UTRGV allows users to disencumber funds from purchase orders that are no longer needed. Only staff with a Reconciler /Requestor role have access to close PO's. Verify that the PO NUMBER is correct, and make sure it belongs to your department. **Once a PO is closed, it cannot be re-instated.**

Questions can be emailed to: esmeralda.rios@utrgv.edu or ishop@utrgv.edu.

1. Set the Document Search to show "ALL".   Enter the PO# in the Quick Search Bar and select the PO number. See sample below.
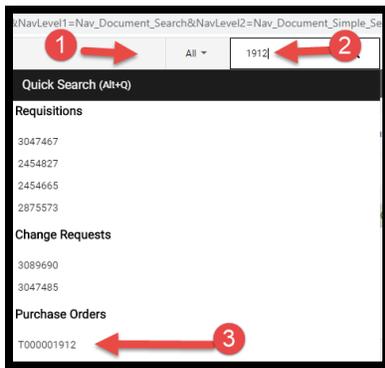
2. Click on menu to close the PO. This option has been moved to the right side of the screen to a document action icon displayed with three dots (…). See sample below. Select Close PO.
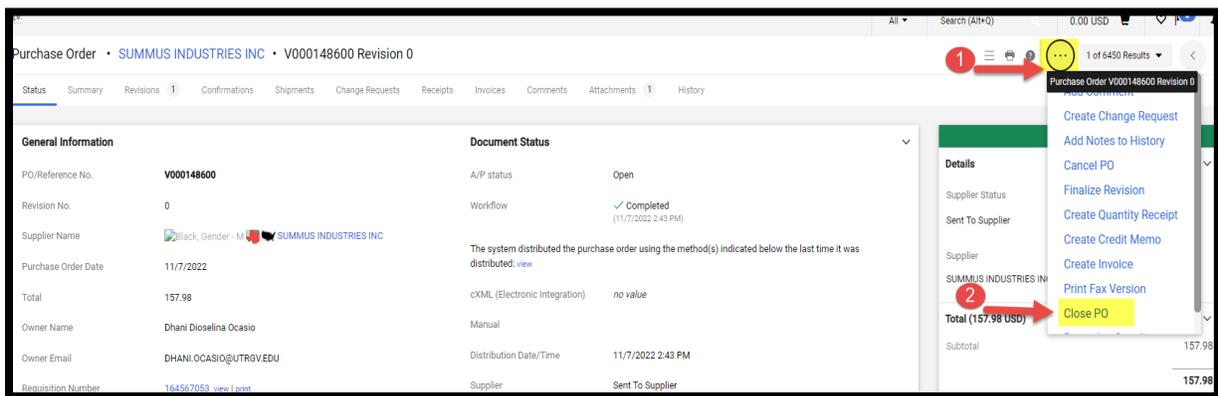
3. Add note for reason to close PO. Click OK.
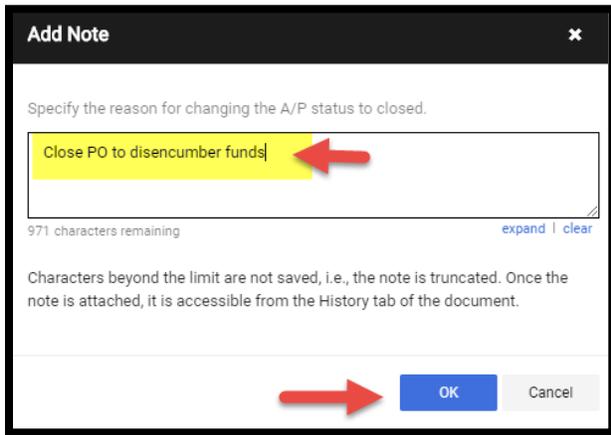
4. The PO will then show a "Closed" status as indicated below. The completion of this process can be verified by looking at the "History tab". It should read PO export connection. See sample below.

   Refer to the Quick Reference guide titled "How to verify the PO Change in PeopleSoft" (page 2-3) to look at the PO Encumbrance balance in the financial books. The system will show "0" after funds have been returned to the account. Here is the link- https://www.utrgv.edu/procurement/_files/documents/quick-reference-guides/ishop/ps-esmeralda-03.21.2024-how-to-verify-the-po-change-in-peoplesoft-1.docx
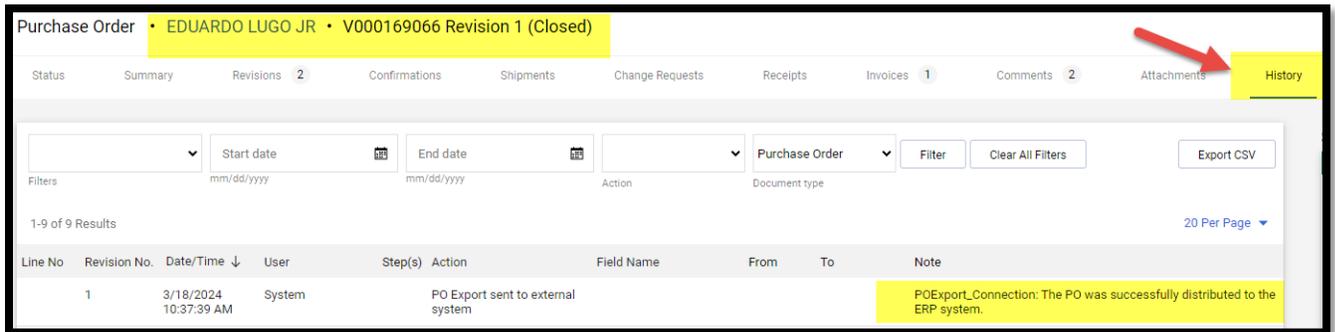
Note –Once a PO is closed, it cannot be re-instated. The system takes only 5-10 minutes to return funds to the account.

For questions, please send an e-mail to Esmeralda Rios at esmeralda.rios@utrgv.edu or to iShop@utrgv.edu.