Checklist 1 - Cannot pull PO into Voucher

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This document contains a list of information, tools, and scenarios to help resolve this issue

Foundation Information

➤ It is important to understand that a Purchase Order (PO) must be:

Approved → 'Valid' Budget Status → 'Dispatched' PO Status

BEFORE it can be pulled in to a voucher.

➤ At the Header Level of the PO: If the '**Hold from further processing**' checkbox is selected, the PO can NOT be pulled in to the voucher.

➤ If 'Receiving is Required' for the PO line, then a **receipt** must also be created *BEFORE* the PO can be pulled in to the voucher.

➤ Use the **Purchase Order Inquiry** page (PO Tool 2) to view the statuses of a purchase order in SMART.

TOOLS

GEN Tool 1: Requisition to Check Process in SMART

AP Tool 1: Create Voucher – Worksheet Copy Option

PO Tool 1: Activity Summary page
PO Tool 2: Purchase Order Inquiry page
PO Tool 3: PO Accounting Entries
PO Tool 4: 'Amount Only' Information

Cannot pull PO into Voucher – Solutions

Scenario 1.1: PO – 'Use Procurement Card' link visible?
Scenario 1.2: PO – Vendor ID
Scenario 1.3: PO – Quantity PO?
Scenario 1.4: PO – Amount PO?