

## View Purchase Requisition Lifecycle and Invoice Payment Status

This quick reference guide details how to view purchase requisition lifecycle and invoice payment status within iO.

### Instructions

I. Under the Procurement Tab, select Manage Requisitions

- 2. Start by setting a default search
  - a. Select Advanced
  - b. Clear the default **Entered By** prompt
  - c. Select Save, add a search name, select Set as Default
- 3. Input a search parameter. And select **Search**
- 4. Click on a Requisition number
- 5. Click **View Lifecycle** to view details of the Order, Shipment, Receipts and Invoices
- 6. Click Paperclip image to view invoice
- 7. To view Payment details
  - a. Click on blue invoice number
  - b. Click payments

## **View Lifecycle and Payment Status**





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Search Results





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### Examples

- In this example, we see that the status is "validated", and the paid amount matches the invoice total. This invoice has been paid. To view payment details, click on the invoice number and select the payments tab. We see that Rice check #6502218 was issued on 9/3/2021 and cleared.
- In example 2, we see that the status is "validated", but no payment has been made. We also see that the item has been received (under Receipts). This means that the payment is in the queue for payment. Remember that Rice's terms are "net 30" so payment will be issued after 30 days.
- Here we see an invoiced with the status "needs revalidation." The first thing to check here is whether a receipt has been created. Number 4 shows that there is no receipt. Reach out to the "entered by" or "requestor" to receive the item. If you find this status and a receipt has been issued, please create a Service Request directed to procurement so they can check the status.

## **Understanding Payment Statuses**

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