



# 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

1. 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

**1** Under the **Procurement** tab, select **Manage Requisitions**.

**2** In the **Manage Requisitions** screen, select **Advanced Search**. Clear the **Entered By** field. Select **Save**, enter a search name (e.g., "Requisitions I Entered"), and select **Set as Default**.

**3** Input a search parameter in the **Entered By** field and select **Search**.

**4** Click on a **Requisition** number (e.g., REQ0000608) in the search results table.

**5** In the requisition details, click **View Life Cycle**.

**6** In the **Invoices** section, click the paperclip icon next to the invoice number (e.g., 100033).

**7** In the **Invoices** section, click the invoice number (e.g., 100182022) to view details. Then click **Payments** to view payment status.

Requisition	Description	Creation Date	Approval Amount	Status
REQ0000608	Check Box	05/06/2021	12.00 USD	Approved





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## Examples

1. 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.

2. 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.

3. 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

1

Receipts

Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
104989	09/02/2021 12:...						

Invoices

Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency
184963973001		08/02/2021	Validated	51.28	51.28	0.00	51.28	USD

Payments

Payments

Number	Payment Document	Status	Reconciled	Payment Date	Paid Amount	Address	Remit-to Account
6502180	Rice Check	Voided	No	09/03/2021	51.28 USD	PO Box 660113, DALLAS, DA...	
6502218	Rice Check	Cleared	Yes	09/03/2021	51.28 USD	PO Box 660113, DALLAS, DA...	
					51.28 USD		

2

Receipts

Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
100003	04/14/2021 9:27...	Kissel, Katie					

Invoices

Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency
INVSIT21pgn3		04/14/2021	Validated	1,600.00		1,600.00	1,600.00	USD

3

Receipts

Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
No data to display.							

Invoices

Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency
191122521001		09/22/2021	Needs revalid...	8.82	0.00	8.82	8.82	USD