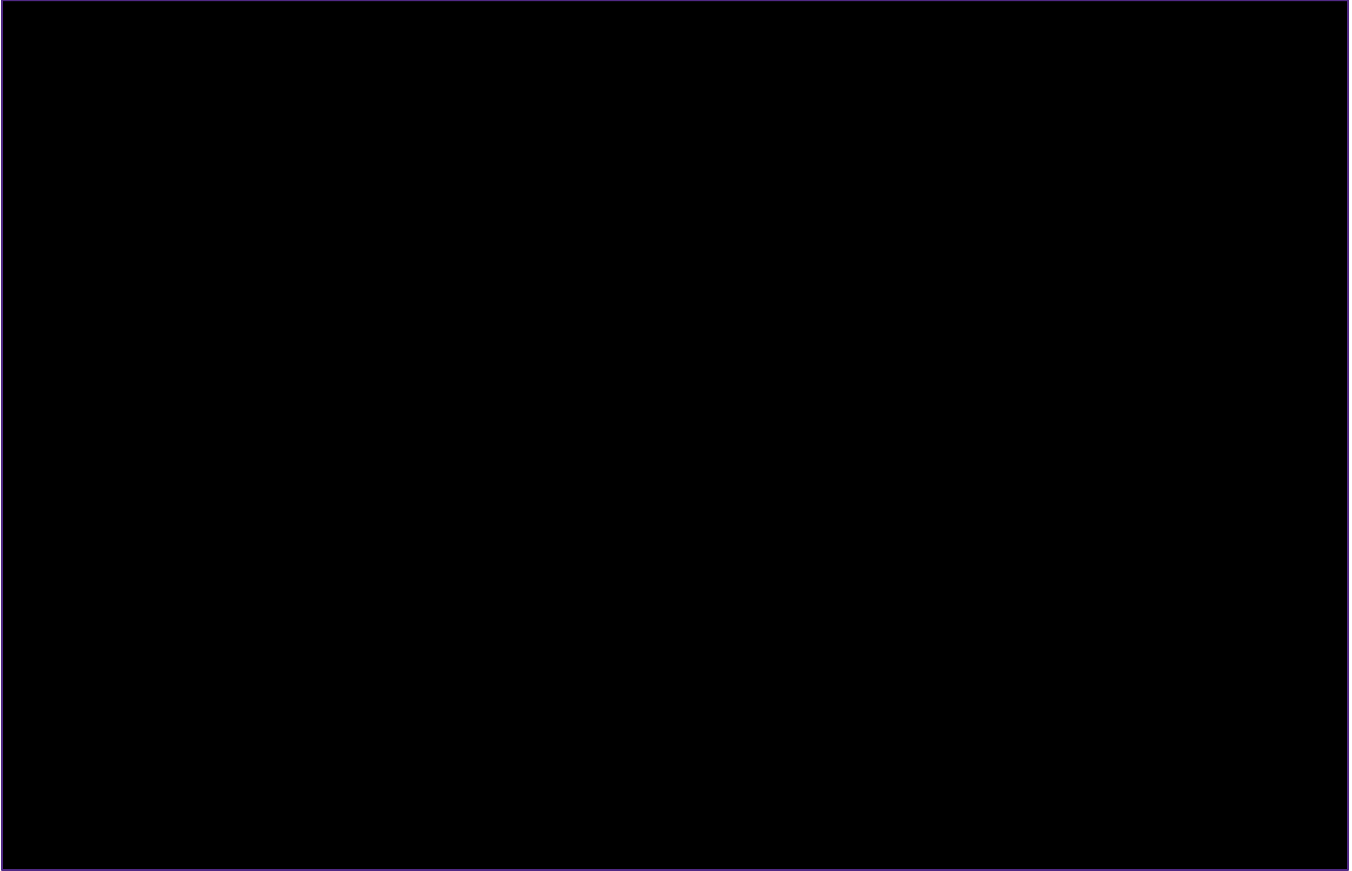Once you have located and opened the Capital Project Record, navigate to the **Procurement** tab

Expand

Contracts and Purchase Orders:

To open an individual PO, click anywhere on the PO line.

In the Purchase Order Record, window you can view:

The current **Status** of the PO

If there are been any changes or **Revisions** made to the PO

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PROJECT MANAGER
CAPITAL PROJECT WORK TASKS: PROCUREMENT TAB

DIRECTIONS:

2 Contracts and Purchase Orders (cont):

▼ **TIP & TRICKS**

PO Status Reference Sheet

▼ **INFORMATION**

The **Total Line Item** amount is updated to the **Total Invoice** amount when a PO is closed so that partially paid POs read as fully paid / zero encumbrance.

To view the **Encumbrance balance** on a Capital Project, navigate to the **Budget** tab on the Project Record and locate line f.
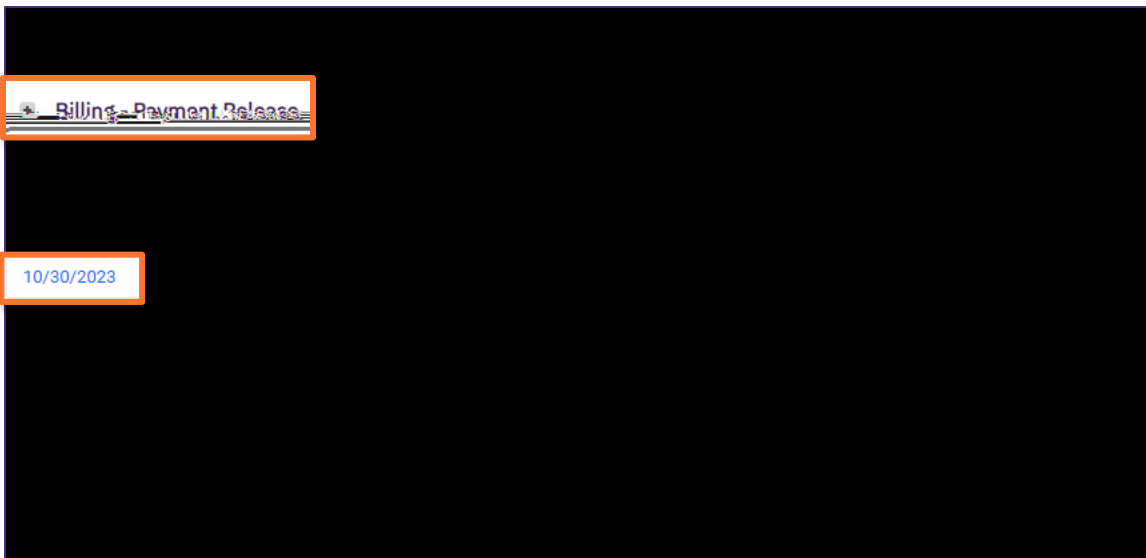
PROJECT MANAGER
CAPITAL PROJECT WORK TASKS: PROCUREMENT TAB

DIRECTIONS:

4 **Billing - Payment Release**: Lists all payments made to vendors who have POs associated with the project. Easily search by date, vendor, PO Number, Invoice Number, Check Number or Check Amount.

Click on the **Check Date** field to open and view the individual PO information.

5 **Billing - Work Task Costs:** Lists the specific Work Tasks associated with the project. Drill down into a work task to see individual technician labor charges, material costs, and any associated comments for the work that was performed.

Click on the **Date** field to open the individual Work Task.