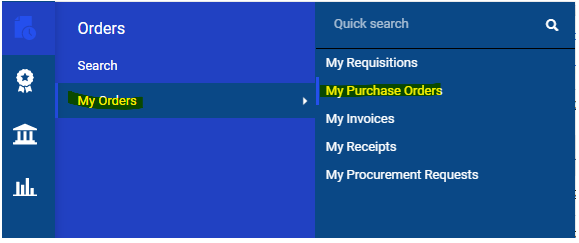
# HOW TO SEARCH FOR AND EXPORT

# OPEN PURCHASE ORDERS IN MT$OURCE

## **Open MT$ource**

**Select Orders 🡪 My Orders 🡪 Purchase Orders**



A list of YOUR Purchase Orders will display on the screen

**Check Purchase Orders you created for two different periods:**

1. **Fiscal Year-to-Date**
2. **Previous Fiscal Year**

## **Change Created Date**

**A screenshot of a search box

Description automatically generated**

**“Fiscal Year-to-Date”**

**OR**

**“Previous Fiscal Year”**

## **Add a Filter**

1. **A screenshot of a computer

   Description automatically generated**Click on “**Add Filter**” drop-down arrow

Type “AP Status” in Search Box

Check box “**AP Status”**

**A screenshot of a computer screen

Description automatically generated**

Check boxfor **“Open”**

Click on “**Apply**”

*Here is an example of filters set correctly for Fiscal Year to Date*

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*Here is an example of filters set correctly for Previous Year to Date*

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**YOUR** **Open Purchase Orders**

(purchase orders that are not closed in MT$ource)

will display on screen.

## **Export your Data to an Excel Spreadsheet**



At the top right of the screen, click on “**Export All**”

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**Enter a Name** for your Exported file

in the “Title\*” text box

Click on **Submit**



You will get on on-screen message:

Click on the words “**Manage Search Exports**” in the popup window

(You can also get to your file through the “Export All” drop down menu)

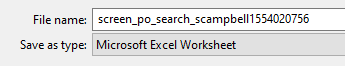
From the **Manage Exports** window, **click on the Title** of your file name**.**

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You will either prompted to **Save in a location on your computer**

(you can change the name of the file)



**From this name**

A screenshot of a computer

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**To this name**

**OR**

You may see your report at the bottom of the screen and open it from there.

**Save (or Open and Save)** your Excel File

## **Open Each Purchase Order on your Report and check the following:**

1. **Receipts Tab** - did you get the product or service?

Create a cost or quantity receipt.

1. **Invoice Tab** - does the vendor need to send their invoice?

Contact the vendor to follow up.

PO # needs to be on the invoice and must be sent directly to [invoice@mtsu.edu](mailto:invoice@mtsu.edu).

1. **Receipts Tab** - is there money left on the purchase order after all invoices have been paid?

Create a Comment on the Purchase Order in MT$ource to

Sandra Campbell **OR** the Buyer listed on the Purchase Order

**requesting the funds be unencumbered** (returned to your index) **and**

**that the purchase is complete**, **paid for, and can be closed.**

*NOTE: The Buyer assigned is on the Summary tab of the Purchase Order; if no Buyer listed, make your Comment to Sandra Campbell.*

*You may use this report throughout the year to keep track of your Purchase Orders and make Comments to Buyers/Sandra Campbell to close after products/services received and invoices are paid.*