



## eShop How-To Sheets

# Searching documents & determining whether an invoice has been paid

This how-to sheet outlines the steps required to:

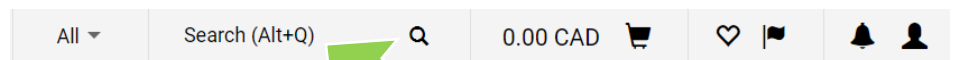
- Search documents within eShop (e.g. requisitions, purchase orders, goods receipts, invoices).
- Determine whether an invoice has been paid.

From cart to requisition:

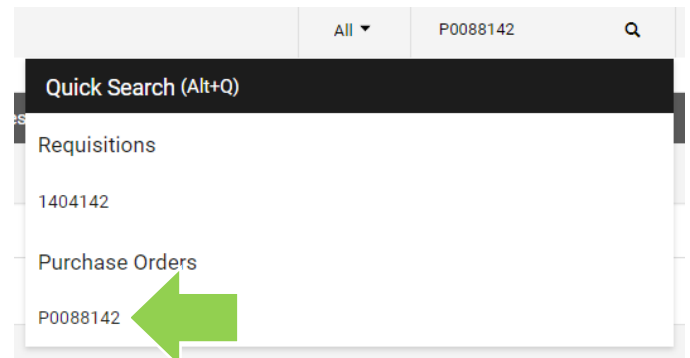
- Once you submit a cart in eShop it is called a requisition.
- Once the requisition moves through approvals, it becomes a purchase order which is sent to a vendor.

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. If you know the document number, enter it in the '**Search (Alt+Q)**' field at the top of the screen and click enter on your keyboard.



From the available options, click on the document you want to view (e.g. P0088142).



### 2a. Searching for a document

Or, if you don't know the document number, the 'Orders' search allows you to search through all of your eShop documents.

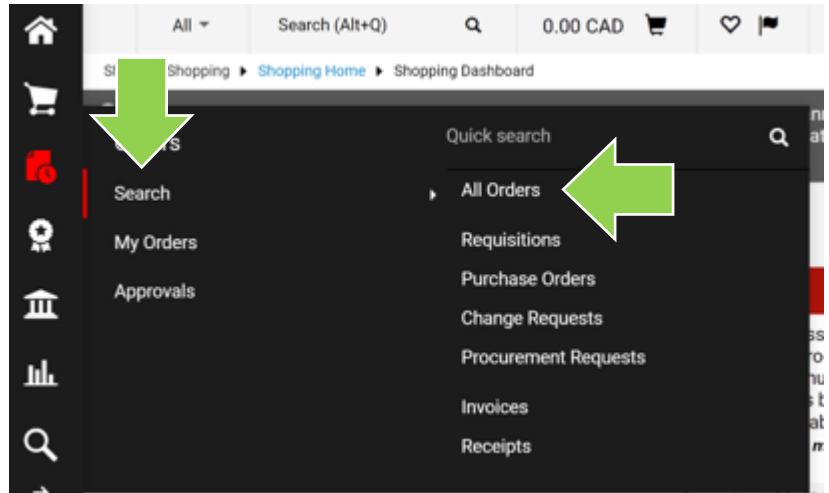
Click on the '**Orders**' icon.



## 2b. Searching for a document

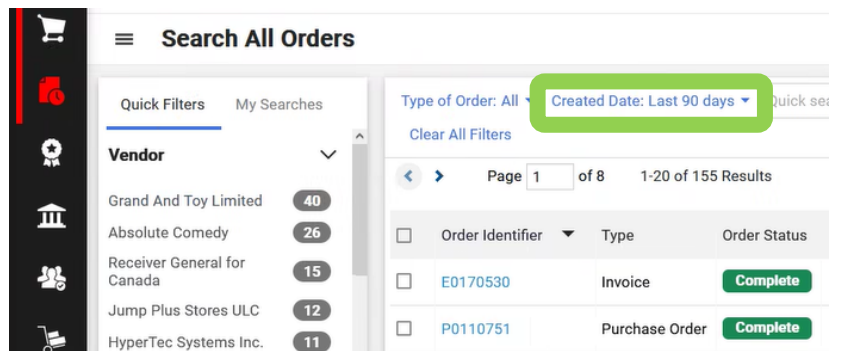
In the window that opens, click on the white **'All Orders'** text.

**Tip:** You may instead choose the type of document you are searching for (e.g. 'Purchase Orders').



## 2c. Searching for a document

In the window that appears, all documents for the last 90 days will be listed.



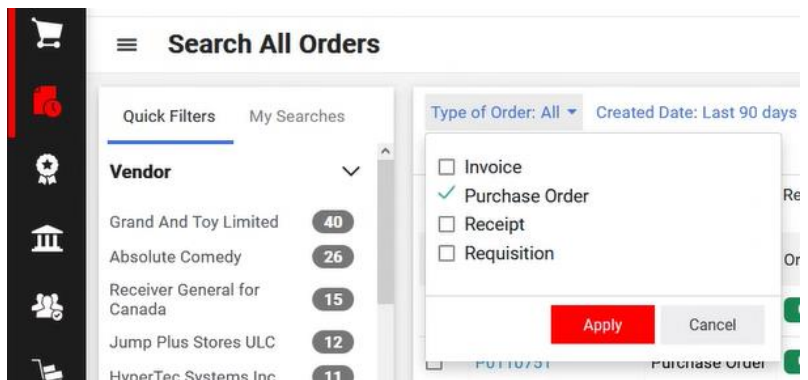
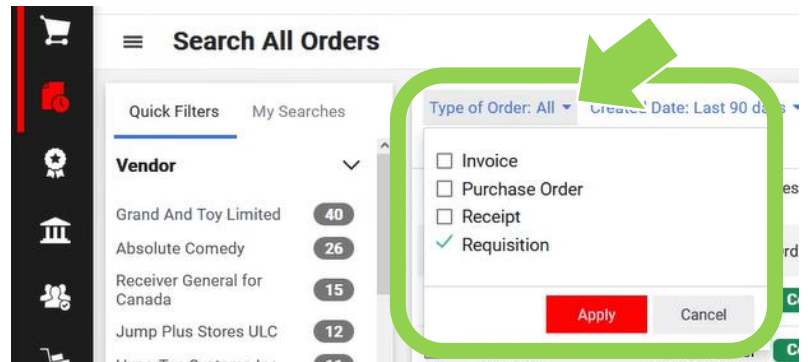
### 3a. Refining Your Search

To refine your search, use the 'Type of Order' drop down to choose the type of document you wish to view by clicking the radio button beside an option (e.g. Purchase Order).

**Tip:** You may search for a requisition to determine where it's sitting in the workflow.

**Tip:** You may search for a purchase order to determine whether it has been sent out to a vendor.

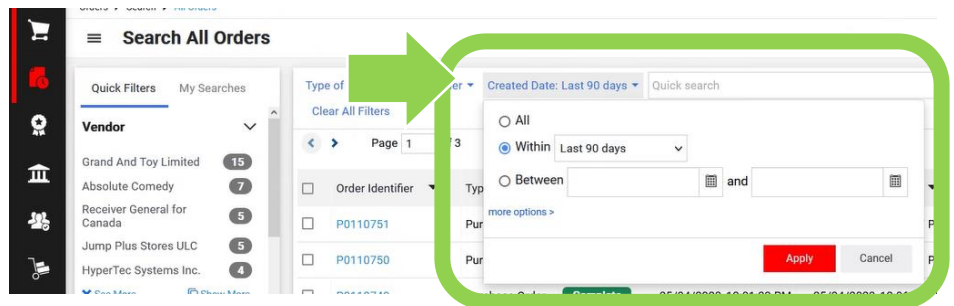
Click on the red **'Apply'** button.



### 3b. Refining Your Search

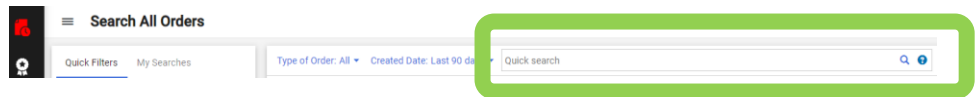
To refine your search, use the 'Created Date' drop down to choose a time frame.

Click on the red **'Apply'** button.

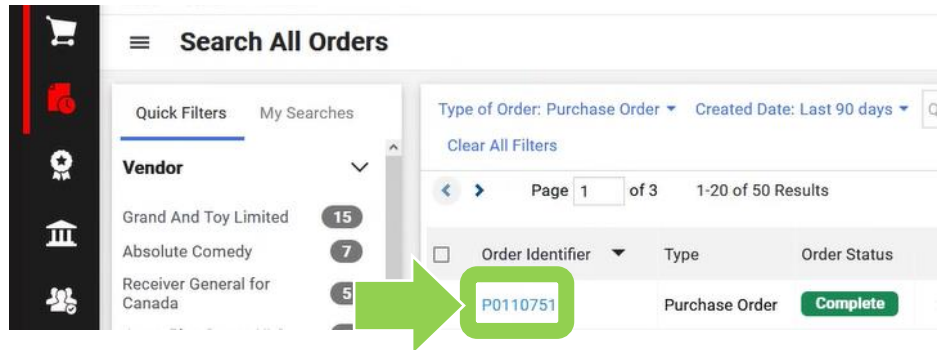


### 3c. Refining Your Search

To refine your search, type a document number, requisition name or supplier name in the 'Quick search' field and press the enter key.



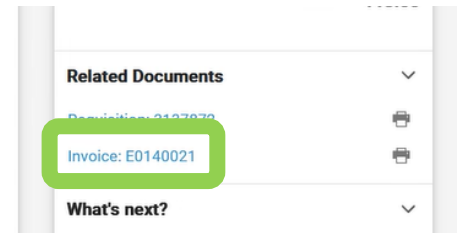
4. For more information about a specific document in the search results, click on the blue 'Order Identifier' number.



### 5a. To determine if an invoice has been paid

Under 'Related Documents', click on the blue 'Invoice' text.

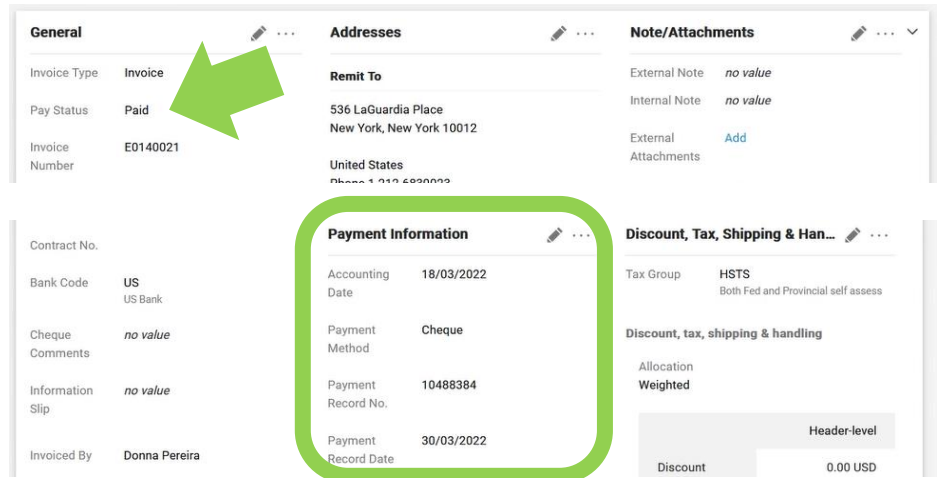
**TIP:** If an invoice is not listed under related documents, it is generally because Accounts Payable has not received the invoice. If you received the invoice directly from the vendor make sure that you email it to [accounts.payable@carleton.ca](mailto:accounts.payable@carleton.ca).



5b. To determine if an invoice has been paid

If the **'Pay Status'** field shows **'Paid'**, payment has been issued to a vendor or individual.

Further details about the payment are provided in the **'Payment Information'** section. The **'Payment Method'** field shows how payment was issued. The **'Payment Record Date'** field shows the date the payment was issued.



The screenshot shows an invoice system interface with several sections. A green arrow points to the 'Pay Status' field in the 'General' section, which displays 'Paid'. A green rounded rectangle highlights the 'Payment Information' section, which contains the following details:

Payment Information	
Accounting Date	18/03/2022
Payment Method	Cheque
Payment Record No.	10488384
Payment Record Date	30/03/2022

Other sections visible include 'General' (Invoice Type: Invoice, Invoice Number: E0140021, Bank Code: US, Cheque Comments: no value, Information Slip: no value, Invoiced By: Donna Pereira), 'Addresses' (Remit To: 536 LaGuardia Place, New York, New York 10012, United States), 'Note/Attachments' (External Note: no value, Internal Note: no value, External Attachments: Add), and 'Discount, Tax, Shipping & Han...' (Tax Group: HSTS, Discount: 0.00 USD).

What next?

- Visit [carleton.ca/facts/eShop](http://carleton.ca/facts/eShop) to find more videos or how-to sheets.
- Questions about the system? Email [eshop@carleton.ca](mailto:eshop@carleton.ca).