

Step One: Add new PO to records

- Save PO PDF to folder
- Open "ImportPOPdfs"
- Tool bar → Editor → Run

Step Two: Download information

- Portal Information
 - Sharepoint → Elevate USA → Documents → KPI Reports → US Macro KPI Report
 - Download to folder
- Xero Information
 - Accounting → Reports → Sales → Customer Invoice Report
 - Set dates to be financial year in question
 - Download to folder
- Delete "OutputDoc.xlsx"

Step Three: Run Document

- Open Run Document
- Change the "thismonthis" month to be the month we're looking at
 - Full month name
 - In quotes
- Change the "Xerodownload" file to be the file name of the customer invoice report
 - Full exact name
 - In quotes
- Tool bar → Editor → Run

Step Four: Analyze Amount Charged

- Delete "POsCharged.xlsx" in folder
- Open "Understand POs"
- Tool bar → Editor → Run
- Open "POsCharged.xlsx"

Step Five: View Monthly Audit Results

- "OutputDoc.xlsx"
- View tab with labeled month
- Isolate schools missing at least 5% of profit from the month
- Celebrate your victories, lament your failures

Step Six: View PO information

- Open "POsCharged.xlsx"