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”