Buyers Checklist
Making Changes to a Purchase Order

Navigation: *Purchasing > Purchase Orders > Add/Update Purchase Orders*

 As long as a purchase order has not been **dispatched,** any changes can be made to the price, quantity, item description, or distribution of any line in the purchase order without creating a change order.

Change Orders are not created unless the purchase order has been dispatched.

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1. Some fields of a dispatched PO are initially protected from change until a Value Adjustment or Change Order icon is selected.

2. To change the **quantity,** you have a choice between changing the quantity on the main page or selecting the change order icon:
    a. The quantity box should be available for you to change the number.
        i. When you click "Save", you will click Yes or No to continue with a change order.
        ii. The Change Order number field ("Change Order: 1") appears next to the PO number and the PO status changes from Dispatched to Pend Appr.
        iii. You will have to budget check, approve, and dispatch the PO again.
    b. Use the same procedures above for Express POs.
    c. Click the change order icon △ on either the 'Statuses' tab on the Line or in the Schedule. This will open up the fields for changes.

3. To change the **price,** you have the choice between using the Value Adjustment or the change order icons.
    a. Value Adjustment icon:
        i. Open up the schedule by clicking this icon 🗓️ .
        ii. Click the Value Adjustment icon 🏷️ .
        iii. The 'Adjustment Amount' field is the same as the unit price. Make your changes.
        iv. Click Refresh, then OK.
    b. Change Order icon:
        i. Click the △ icon on the 'Statuses' tab on either the Line or Schedule that needs changing. This icon can also be found under either the Line Details icon 📑 or the Schedule Details (same icon).

ii.   Change the price, then click refresh (optional), and SAVE.

iii.   "Change Order: 1" will appear below the PO ID on the main page.

iv.   You will have to budget check, approve, and dispatch the PO again.
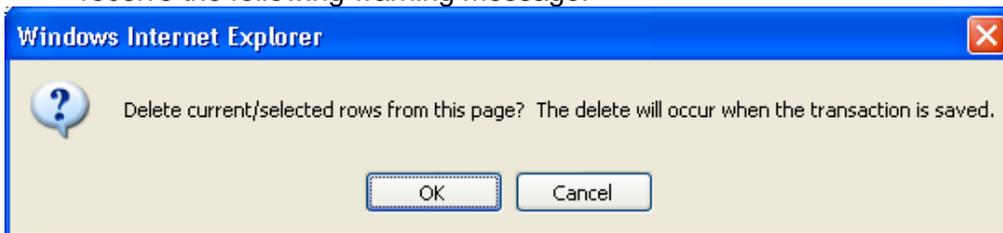
4.   To change the **item description**:

a.   Go to the 'Statuses' tab on the Line item and click the change order icon ▲.

b.   This will activate the 'Description' field for changes. Enter your change and save.

c.   You can change the quantity and price on the line as well, but the fields in the schedule(s) will not be active.

i.   Go into the schedules and select the change order icon if changes need to be made on any of the schedules.

d.   "Change Order: 1" will appear below the PO ID on the main page.

e.   For item description changes only, you do not have to budget check or approve the PO again. You need only dispatch again if the vendor wishes.

5.   To **add a line item** to a dispatched PO:

a.   To add another item to a dispatched PO, click the plus sign on Line 1. You will be asked how many lines you wish to add.

b.   A warning message will appear that the action will create a change order. Click OK.

c.   Set up the schedule(s) and distribution lines as needed for the new item.

d.   SAVE. "Change Order: 1" will appear below the PO ID on the main page.

e.   You will have to budget check, approve, and dispatch the PO again.

6.   To **remove a line item** from a dispatched PO:

a.   If you try to use the minus button to remove a line from a dispatched PO, you will receive the following warning message:

Windows Internet Explorer

? Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK   Cancel

b.   When you click OK, you will receive another warning:

Windows Internet Explorer

⚠ Cannot delete a line once purchase order has been dispatched. Cancel the line instead. (10200,29)

When a purchase order has been dispatched, including change orders that have been created, a purchase order line cannot be deleted.

You can cancel the line instead to indicate that it is no longer an active component of the purchase order.

OK

c. To cancel the line instead, click on the Line Details icon , then the ✖ , then OK.

d. Save. For more details about canceling within a PO, see "Checklist for Canceling Within Purchase Orders."

7. To **add or remove a schedule**, follow the same procedures as for line items above.
   a. Save all changes. Approve PO Amount.
   b. Dispatch PO again if needed.

Any change made to a purchase order will show up in **bold** font when that PO is later dispatched again. This includes the price, quantity, item description, new items or lines added, and any cancellation done from the original dispatched PO.


Change Orders After the PO Has Been Received

1. Change orders are possible whether a purchase order is dispatched and <u>partially received</u> or <u>fully received</u>.

2. Any changes to price will affect the items already received. Changes to quantity can reflect change of information from vendor.

3. The vendor may request a new PO to be dispatched based upon these changes.

REVIEWING CHANGE ORDER HISTORY

Navigation: *Purchasing > Purchase Oders > Manage Change Orders > Review Change History*

1. Enter the PO number you wish to view. You will be brought to this screen:
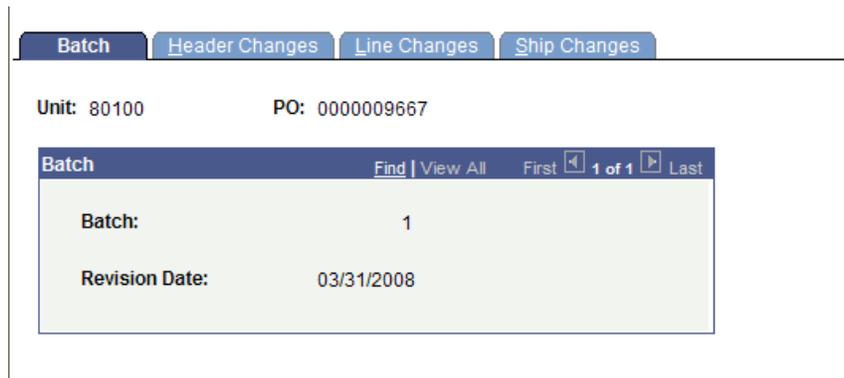
2. The 'Header Changes' tab will only show changes that were made in the Header. In the case below, there weren't any:

| Batch | Header Changes | Line Changes | Ship Changes |

Business Unit: 80100   **PO Number:** 0000009667

PO Header			Customize | Find | View All | ⊞ First ◄ 1 of 1 ► Last
Batch	**Seq**	**Description**	**More Information**
0	0		

3. The 'Line Changes' tab shows all changes made to the lines. You will probably have to click 'View All' to see everything. In the screen below, no changes were made to Line 1, but Line 2 was added (Seq 1), then canceled (Seq 2):

| Batch | Header Changes | Line Changes | Ship Changes |

Unit: 80100   **PO Number:** 0000009667

Changes to PO Lines				Customize | Find | View 9 | ⊞ First ◄ 1-20 of 20 ► Last
Line	**Batch**	**Seq**	**Description**	**More Information**
2	1	1	Status	A
2	1	1	Change Order Source	ONL
2	1	1	Change Type	I
2	1	1	Buying Agreement ID	
2	1	1	Buying Agreement Line Nbr	
2	1	1	More Information	cell phone charger
2	1	1	Item ID	
2	1	1	Vendor Item ID	
2	1	1	Last Change Date	2008-03-31 16:19:35.000
2	1	1	Manufacturer ID	
2	1	1	Last User to Modify	BHAMAN@ND.GOV
2	1	1	RFQ ID	
2	1	1	RFQ Line	
2	1	1	Unit of Measure	EA
2	1	1	Vendor's Catalog Number	
2	1	2	Status	X
2	1	2	Change Order Source	ONL
2	1	2	Change Type	X
2	1	2	Last Change Date	2008-03-31 16:30:00.000
2	1	2	Last User to Modify	BHAMAN@ND.GOV

4. The 'Ship Changes' tab shows all changes made on the Schedules. The screen below shows where Schedule Line 2 was added (Seq 1), then canceled (Seq 2). The Seq 0 in this example just shows which PO defaults filled in after the second line item was added.

Unit: 80100   **PO Number:** 0000009667

Changes to PO Schedules					Customize | Find | View 9 | 1-25 of 25 Last
Line	**Sched**	**Batch**	**Seq**	**Description**	**More Information**
2	1	0	0	Status	A
2	1	0	0	Due Date	
2	1	0	0	Freight Terms Code	FOB DEST
2	1	0	0	Merchandise Amt	
2	1	0	0	Price	
2	1	0	0	Purchase Order Quantity	3.00000
2	1	0	0	Ship To Location	C01
2	1	0	0	Ship Via	COMMON
2	1	1	1	Status	A
2	1	1	1	Change Order Source	ONL
2	1	1	1	Change Type	I
2	1	1	1	Due Date	03/31/08 12:00:00AM
2	1	1	1	Freight Terms Code	FOB DEST
2	1	1	1	Last Change Date	2008-03-31 16:19:35.000
2	1	1	1	Merchandise Amt	45.00000
2	1	1	1	Last User to Modify	BHAMAN@ND.GOV
2	1	1	1	Price	15.00000
2	1	1	1	Purchase Order Quantity	3.00000
2	1	1	1	Ship To Location	C01
2	1	1	1	Ship Via	COMMON
2	1	1	2	Status	X
2	1	1	2	Change Order Source	ONL
2	1	1	2	Change Type	X
2	1	1	2	Last Change Date	2008-03-31 16:30:00.000
2	1	1	2	Last User to Modify	BHAMAN@ND.GOV

5. If more than one user makes changes to a purchase order, this inquiry page can help track which user made which changes and when.