

This document describes how to process a change order against a posted purchase order. To access the change order process, from the menu, select:

Purchase Orders ▶ Change Orders ▶ Entry



If a PO is entered with the wrong PO date, it must be liquidated and re-entered. Use the Create New from Posted tool to create the new Purchase Order based on the one with the wrong date.

Change Order entry is similar to Purchase Order entry. Detailed instructions are available in [PO–150 Change Orders Comprehensive Guide](#) in the Help Reference Library.

Overview... This card explains how to make changes to an open Purchase Order via a change order.

Menu...

Purchase Orders ▶ Change Orders ▶ Entry

Locate Purchase Order:

2 PO#	3 DescCode	4 PODate	5 Vendor	Vendor Name	Status	PO Total	PO Balance	InPg VOU
195999	FIRE	01-Jul-2022	011790	OFFICE DEPOT	Open	26,96	26,96	
195999	FIRE	01-Jul-2022	106783	ROPER THE PRODUCTIONS, INC.	Open	660,00	16,04	
195999	FIRE	01-Jul-2022	001833	ADMINS INC	Open	100672,20	96222,60	
195998	CURRICULUM	01-Jul-2022	021886	MCGRAW-HILL EDUCATION, INC	Open	32794,70	32794,70	
195997	FIRE	01-Jul-2022	001833	ADMINS INC	Open	68338,57	64886,97	
195991	MIDDLE	01-Jul-2022	107403	ARMOUR CAPITAL SERVICES	Open	237,23	237,23	
195990	FIRE	01-Jul-2022	001833	ADMINS INC	Open	500,00	500,00	
195998	HIGHSCHOOL	01-Jul-2022	014183	MAR MEDICAL SUPPLY	Open	394,87	350,56	

The Purchase Order Change Selection screen lists all Purchase Orders available for

changes.

Click on the [2 PO #] button, enter the Purchase Order number into the column and click on the [1 Do Change] button:

Enter Data in the Change Order Entry Screen:

This screen is very similar to the Purchase Order Entry screen; make changes as needed.

a Required: Enter a change reason and an effective date for the change order (must be later than or equal to the PO date).

b To zero out a line, select **Actions ▶ Close Line & Relieve Encumbrance**.

Select **Actions ▶ Edit List** to produce a list of the old and new values on the PO

- c** Split an existing line between multiple General Ledger Accounts
- d** Add new lines
- e** Copy existing lines
- f** Once all changes are made, be sure to [9 Check PO] to continue with the process



Make Changes on the [2 Items] tab:

On the [2 Items] tab, make changes to the item description, a Line Change reason, add a requisition or contract number, or add or change a retainage percentage or amount.

percentage or amount.

9 Exit the change; the Purchase Order status will show Change Order in Progress until the change order is posted; selected users will have access to Post Changes. If there are no errors, the change order is marked as ready for approvals or release and posting. Any required approvals (either for Budget or for Change Approval) must be completed before the change order is posted.

Return to the Entry tab to Check the Change Order:

Once the PO Change Order is checked (and approved), an authorized user can Post the Change from the change order screen by selecting Actions ▶ Post Change or select “Print and Post Changes” from the Change Orders Submenu. The Change Order Posting Edit List will provide details on what changes are being made to the Purchase Order.

Purchase Orders ▶ Change Orders ▶ Print and Post Changes

If minimal changes were made, the system will display a message to print a copy of the changed Purchase Order once the change is posted.

Frequently Asked Questions

Q: I entered a change order but want to cancel without posting it; what do I do?

A: To cancel the change, first 9 exit the change, then from the menu, select:
Purchase Orders ▶ Change Orders ▶ Remove Change Order

PO#	DeptCode	PO Date	EntryUser	Vendor Name	PO Total	Status	Email Removal Notes
195890		01-Jul-2022	THERESA	HAYES PUMP INC	16843.10	Entry Begun	
195897	HSCHOOL	01-Jul-2022	THERESA	M&M MEDICAL SUPPLY	494.87	Entry Begun	9 Edit Note
195907	HSCHOOL	01-Jul-2022	THERESA	ADMINS INC	69338.57	Entry Begun	
195908	TRICULLUM	01-Jul-2022	THERESA	MCGRAW-HILL EDUCATION, INC.	32794.70	Entry Begun	
195908	HSCHOOL	01-Jul-2022	THERESA	ADMINS INC	100672.20	Entry Begun	
195909	HSCHOOL	01-Jul-2022	THERESA	STAPLES	180.96	Ready For Post	
195999							