





# Creating A Change Order / Modifying A Purchase Order

## General Notes and When To Use:

-  **Used By:** Buyers
-  **Domain:** Materials
-  **Module:** Purchasing
-  **When:** To create a Change Order that allows changes to be made on an existing PO. The previous version gets saved to history.

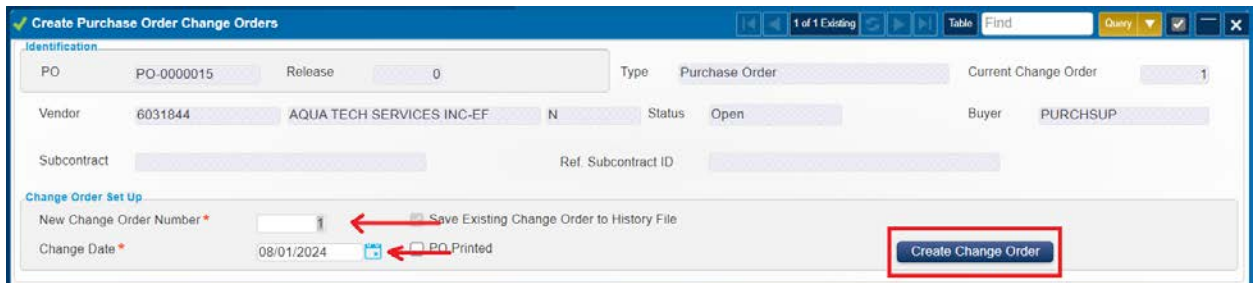
When there is an approved requisition that requires a change to an existing Purchase Order, a Change Order MUST be created before an approved requisition is processed, in order to allow the req to be applied to the existing purchase order.



## Instruction:

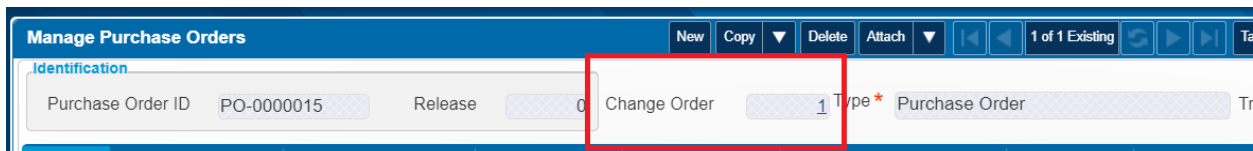
**Materials > Purchasing > Purchase Orders >  
Create Purchase Order Change Orders**

- 1) Upon opening the screen, a **Query** screen will open to search for the PO. Enter the PO number or parameters to locate the PO the change order will be created for.
- 2) Click the **Create Change Order** button to create a new record and save the pre-existing record to PO history.

**Result:** The **New Change Order Number** and **Change Date** fields will populate.







- 3) Click on the **Gears**  icon and select **Create Change Order**.
- 4) Click the **Save**  icon to save Record.
- 5) Close the Purchase Order Change Order screen, and go to **Materials > Purchasing > Purchase Orders > Manage Purchase Orders** and perform a query for the PO.
- 6) Verify the Change Order field now reflects the Change Order number created.



- 7) If you are making changes **not** based on a requisition, you can now make changes directly to Change Order 1 when the PO is opened in Manage Purchase Orders. Once changes are made, Save the PO Change Order.
- 8) If you are making changes based on a requisition, an approved requisition can now be applied to the PO that has this new Change Order created.
  - a) Go to Apply PO Info to Purchase Requisitions and query the requisition. Unless it's already selected, click the "Combine with Other Requisitions" box. Follow the steps for loading an existing PO number:
    - i) Within the Assign PO Defaults tab, change Assign PO Option to Manual and select the PO number in the PO field.
    - ii) Click the Assign PO subtask.
    - iii) Click the Autoload button, or click New for adding specific requisition lines, and confirm the PO number in the Assign PO area. Click Save.
  - b) In Create Purchase Orders, query the requisition or the PO and preview to make sure the requisition is assigned to the correct PO change order. Run the Gears.
- 9) Go to Manage Purchase Orders and review the updates to the Purchase Order Change Order. The PO should be in Pending status because the new lines are Pending. Make any final revisions to the new lines, and then go to Approve Pending Purchase Orders to click "Open" for the PO Status. Save and follow the PO printing procedures.




## Print Purchase Order Change Orders



### General Notes and When To Use:

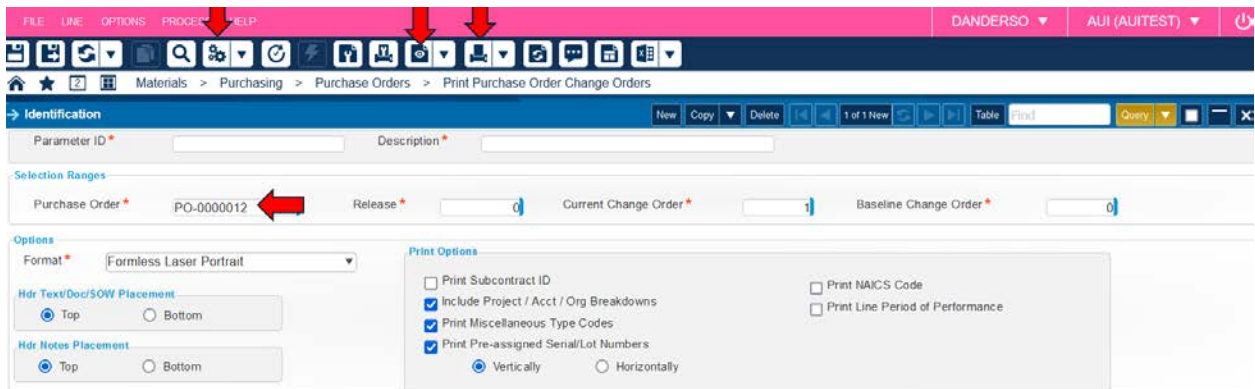
-  **Used By:** Buyers
-  **Domain:** Materials
-  **Module:** Purchasing
-  **When:** To print and issue a purchase order that has a change order.

### Instruction:

***Materials > Purchasing > Purchase Orders >  
Print Purchase Order Change Orders***

- 1) **Enter Selection Range parameters** for printing:
  - a) **Purchase Order:** Click the spyglass  to query and select a PO
  - b) **Change Order:** The most recent change order will default Current Change Order.
  - c) **Baseline Change Order:** Click the spyglass  to query and select a PO-Change Order
- 2) **Options section** – Update parameters as required.
- 3) **Preview** the Print by clicking on the Preview  icon.

- 4) Click on the **Print**  icon, and select **Purchase Order**  
*Result: The Process Complete window will indicate 100% and the output file will be available*
- 5) **Review the output file** to verify it looks correct and does not need to be reprinted.
- 6) Click on the **Gears**  to Update PO Order printed flag.  
*Result: In Purchasing -> Manage Purchase Order Receipts -> PO Line Details Tab Traveler Printed Flag on Receipt Lines will indicate "Y".*



**Note:** If a “fatal error” is received after running the gears, disregard. The error occurs when user print settings are set to execute the update upon print action

The generated PO change order electronic file can now be signed electronically by the assigned Buyer and saved. This signed, printed change order can now be sent to the Vendor and any other party.

Save the PO change order and any other new files to the “Purchase Orders FYxx” folder in the Contracts shared folder within the original PO’s folder.