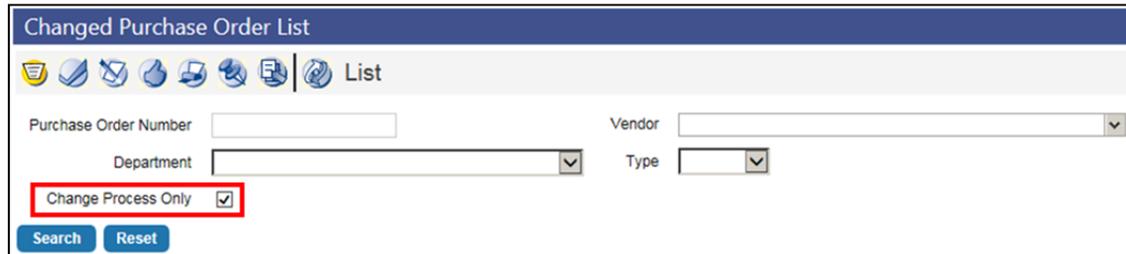# CHANGE PURCHASE ORDER ENTRY

Using the Change Purchase Order process will allow users to modify and complete posted purchase orders. Possible changes include altering items, amounts, G/L accounts, as well as completing partially used purchase orders, or cancelling purchase orders in their entirety even if they were never utilized.

MODIFYING PURCHASE ORDER

1. Navigate to Financial Management → Procurement → Purchasing → Change Purchase Orders

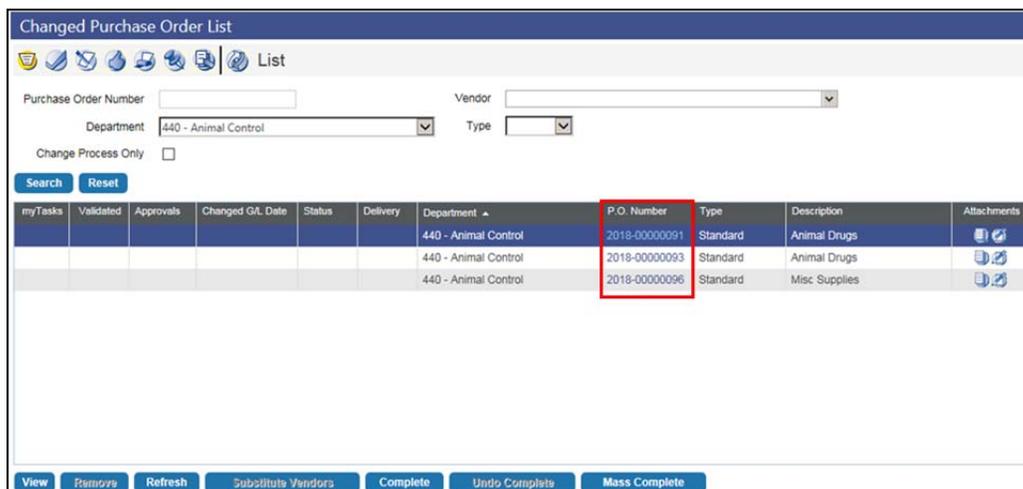2. Use any combination of the search fields at the top of the screen to locate the PO needing modification
   - Uncheck the "Change Process Only" field
   - Click "Search" and the screen will refresh to display the results

3. Click on the PO number of the one that you want to change

4. This will take you into the Change PO entry screen (similar to PO entry).
   - Update the PO as needed
   - **NOTE:** The Department, Vendor and PO Type are the only fields that cannot be changed

5. Complete the "Change/Correct Reason" fields
   - Select one of the options in the drop down list
   - Click on 🧹 icon next to the drop-down to add additional text explaining the reason

   - Enter the change reason then click OK

6. The item summary in the middle of the screen shows the total quantity and dollar amount of the items on the PO. Use the dropdown list to select an item to change.

| Item | ◄◄ ◄ | Medical Supplies - Animal Drugs ▼ | ► ►◄ 🌀 🖨 | Number of Items | 1 | Total | $784.56 | Encumbered Amount | $784.56 |

7. The buttons at the bottom of the screen will allow you to:

| Save | Save/New Item | Delete Item | Remove PO | Complete Item | Undo Complete Item | Reset |

- **Save** – Save the Change PO once you're done making changes
- **Save/New Item** – Save any changes made so far and add a new item to the PO
- **Delete Item** – Delete an item that was added to the Changed PO.
  - This button is inactive for items that previously existed on the PO.
- **Remove PO** – this will remove any changes made to the PO and take it out of the change process. This will not void/complete the PO.
- **Complete Item** – Completes/Closes the item and unencumbers funds
- **Undo Complete Item** – Reactivate an item that was completed
- **Reset** – Removes any unsaved changes

8. Finish the change process by referring to the Purchase Order Entry steps

9. Attach documents

10. Validate

11. Approve

COMPLETING PURCHASE ORDERS

Completing purchase orders will release any outstanding encumbrance amount.

Completing a purchase order which has already been partially utilized will result in that purchase order being moved into a C-Pending status (Complete Pending).

Completing a purchase order which has never been utilized in Accounts Payable Invoicing will result in that purchase order being moved into a V-Pending status (Void Pending).

1. Navigate to Financial Management → Procurement → Purchasing → Change Purchase Orders

2. Use any combination of the search fields at the top of the screen to locate the PO needing modification
   - Uncheck the "Change Process Only" field
   - Click "Search" and the screen will refresh to display the results

3. Highlight the PO that needs to be completed (click anywhere other than the PO number)

4. Click "Complete" button at the bottom of the screen

5. Select a change reason code and enter a description for the change then click "OK"

6. The status will change to either V-Pending or C-Pending

7. Using the workflow icons at the top of the page, finish the process by validating and approving:

· Validate

· Approve