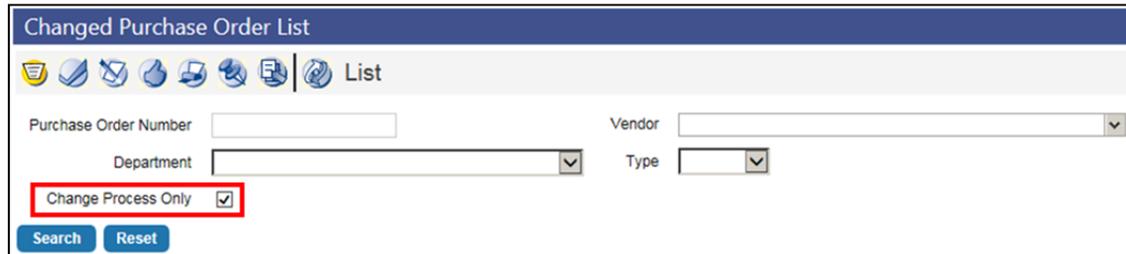


# CHANGE PURCHASE ORDER ENTRY

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



Changed Purchase Order List

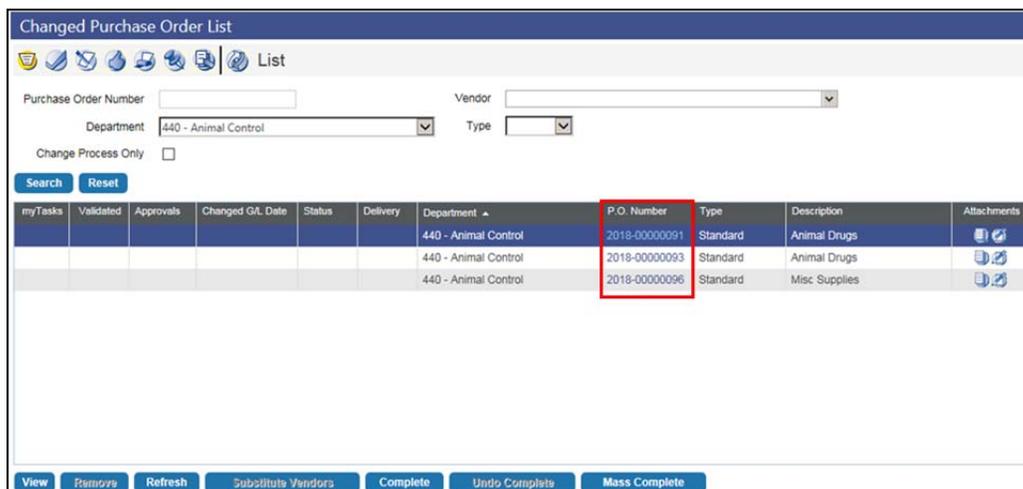
Purchase Order Number  Vendor

Department  Type

Change Process Only

Search Reset

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



Changed Purchase Order List

Purchase Order Number  Vendor

Department 440 - Animal Control Type

Change Process Only

Search Reset

myTasks	Validated	Approvals	Changed G/L Date	Status	Delivery	Department	P.O. Number	Type	Description	Attachments
						440 - Animal Control	2018-00000091	Standard	Animal Drugs	
						440 - Animal Control	2018-00000093	Standard	Animal Drugs	
						440 - Animal Control	2018-00000096	Standard	Misc Supplies	

View Remove Refresh Substitute Vendors Complete Undo Complete Mass Complete

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

The screenshot shows the 'Changed Purchase Order - 2018-0000091' entry screen. The interface includes a header with navigation icons and the word 'Entry'. Below this, there are several sections:
 

- Department:** 440 - Animal Control
- Approval Status:** 0 of 1 at 1
- Validation Status:** N/A
- Printed:** Not Printed
- Encumber Funds:** Yes

 The main form area contains:
 

- Vendor:** 1754 - MIDWEST VETERINARY SUPPLY
- Description:** Animal Drugs
- Type:** Standard
- Form Type:** SSRS PO Form - PO Form
- Bill To Location:** Animal Reg - Animal Regulation
- Change/Correct Reason:** (This field is highlighted with a red box and has a dropdown arrow and a small icon next to it.)
- Purchasing Address:** MIDWEST VETERINARY SUPPLY - Pri
- G/L Date:** 5/8/2018
- Deliver by Date:** (empty)
- Expiration Date:** (empty)
- Resolution Number:** (empty)
- Assign to Buyer:** (empty)

 Below this, there is an **Item** section:
 

- Item:** Medical Supplies - Animal Drugs
- Number of Items:** 1
- Total:** \$784.56
- Encumbered Amount:** \$784.56

 The **Item (Status: Open)** section includes:
 

- Item:** Medical Supplies
- Description:** Animal Drugs
- Quantity:** 1.0000
- Unit of Measure:** Each - Each
- Price per Unit:** \$784.5600 / \$784.56
- G/L Account:** 011.440.00.4227 - SUPPLIES/DRUGS/NURSING

 The **Detail** section includes:
 

- Vendor Part Number:** (empty)
- Employee:** (empty)
- Ship Via:** (empty)
- Ship To:** Animal Reg - Animal Regulation
- Freight Terms:** (empty)
- Confirming Request:**  1099 Item
- Tagable Item:**

 At the bottom, there are buttons: Save, Save/New Item, Delete Item, Remove PO, Complete Item, Undo Complete Item, and Reset.

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

This image shows a close-up of the 'Change/Correct Reason' dropdown menu. The selected option is 'Amt - Change Amount'. To the right of the dropdown is a small icon of a document with a pencil, which is used to open the 'Reason Code Entry' dialog.

- Enter the change reason then click OK

The screenshot shows the 'Changed Purchase Order Reason Code Entry' dialog box. It has a title bar and a text area where the user has entered: 'Increased PO amount due to 5 additional laptops needed'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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.



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



- **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

Changed Purchase Order List

Purchase Order Number  Vendor

Department  Type

Change Process Only

Search Reset

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)

Changed Purchase Order List

Purchase Order Number  Vendor

Department 440 - Animal Control Type

Change Process Only

Search Reset

myTasks	Validated	Approvals	Changed G/L Date	Status	Delivery	Department	P.O. Number	Type	Description	Attachments
						440 - Animal Control	2018-0000091	Standard	Animal Drugs	
						440 - Animal Control	2018-0000093	Standard	Animal Drugs	
						440 - Animal Control	2018-0000096	Standard	Misc Supplies	

View Remove Refresh Substitute Vendors Complete Undo Complete Mass Complete

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

myTasks	Validated	Approvals	Changed G/L Date	Status	Delivery	Department	P.O. Number	Type	Description	Attachments
						45 - FINANCE	2017-00000001	Standard	Supplies	
	0 of 1 at 1			V-Pend		45 - FINANCE	2017-00000003	Standard	Building Supplies	
	0 of 1 at 1			Open		45 - FINANCE	2017-00000004	Standard	Computers	

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

- Validate



- Approve

