PO.020.220 – CREATING A PURCHASE ORDER CHANGE ORDER

Purpose	To create a Purchase Order Change Order.
Description	A Change Order allows users to update information on a purchase order that has already been sent to a supplier. Change Orders can be created manually for any field on a purchase order or automatically when a Dispatched PO requires modifications as defined on the Change Order Template.
Security Role	**BOR_PO_MAINTAIN**
Dependencies/ Constraints	• Purchase Order must be in a Dispatched status for the system to create a Change Order. • Change orders cannot be created once a purchase order has been sourced to a Voucher. • Security Administrators need to set up the user's role and appropriate user preference.
Additional Information	Once a change order is created, the purchase order cannot be sent to the supplier via a dispatch method of EDX (used for GeorgiaFIRST Marketplace Purchase Orders). Users will need to reach out to the supplier directly via some other method to dispatch the changed purchase order.

Procedure

Below are step by step instructions on creating a Change Order for a purchase order.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Purchase Orders** link.
5.	Click the **Add/Update POs** link.
6.	Click the **Find an Existing Value** tab.
7.	Enter or search for an existing purchase order. The system navigates to the Add/Update POs page.
8.	Click on the **Change Order** icon next to the PO Status to initiate a manual change order. The system opens purchase order fields to edit. Users can modify one or more of the following fields on the PO Header: • Billing Location • Buyer • Contact • **Add Comments*** • Currency Code • Purchase Order Reference • Payment Terms ID • **Ship Via*** • **Add ShipTo Comments*** • Tax Exempt • Tax Exemption Number *** Updating these fields will automatically create a change order** ***Note**: The Supplier ID cannot be changed when a PO is Dispatched because a purchase order is specific to a supplier. If users need to create a PO for a different supplier, first cancel this PO and then create a new purchase order with the different supplier. For more information, see PO.020.260 – Cancelling a PO/PO Lines.* ***Note**: If a user selects the Send to Supplier checkbox for a comment after a purchase order was dispatched, this will automatically create a change order.*

Step	Action
9.	Under the **Details** tab, users can modify one or more of the following fields: • **PO Quantity*** • **Category*** • **Price*** • Line Status • Buy Agree ID • Buying Agreement Line Number • More Information • Item ID • Supplier Item ID • Manufacturer ID • RFQ ID • RFQ Line • Unit of Measure ***Updating these fields will automatically create a change order** ***Note**: If a user selects the Send to Supplier checkbox for a comment after a purchase order was dispatched, this will automatically create a change order.*
10.	Under the **Ship To/Due Date** tab, users can modify one or more of the following fields: • **Due Date*** • **Ship To location*** • **Price*** ***Updating these fields will automatically create a change order**
11.	On the **Statuses** tab, users can cancel items that are no longer needed by clicking the red 'x' next to each item. ***Note**: If a user attempts to cancel a line or a schedule that was received (even partially), the system adjusts the quantity of the line or schedule and creates a change order.*
12.	On the **Attributes** tab, users can modify the Amount Only checkbox.
13.	After all edits have been made, click the **Save** button. ***Note**: The purchase order may need to go through approval workflow and budget checking again prior to being able to dispatch it.*

Step	Action
14.	Verify a sequence number appears next to Change Order in the header. ***Note**: A change sequence number tracks the sequence of changes made within each purchase order at the header, line, and schedule levels. After the initial dispatch of a purchase order, a change sequence number is assigned to each change.* *Each time changes are made to the header, line and/or schedule values, the sequence number increases by 1. These sequence numbers do not appear on the purchase order to the supplier but appear in the purchase order history.*
15.	Click the **Dispatch** button. The Dispatch Options window appears.
16.	Click **OK**.
17.	The system will ask "Would you like to wait for confirmation that the PO Dispatch process has completed?" Select Yes or No depending on preference.
18.	Generate a copy of this purchase order to send to the supplier. For more information, see PO.020.210 – Printing Purchase Orders. ***Note**: information on the purchase order that was modified as part of the change order now displays on the printed version in bold.*