

Purchase Order Change Orders for Activity March Training Documentation 2018.1 2020

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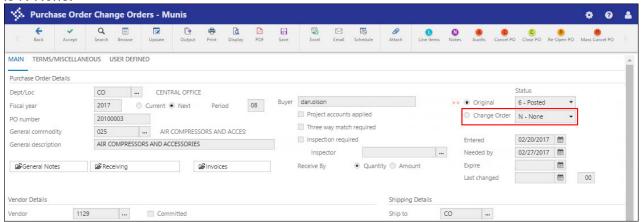
Purchase Order Change Orders

Purchase order change order process includes cancelling and closing purchase orders.

Changing a Purchase Order

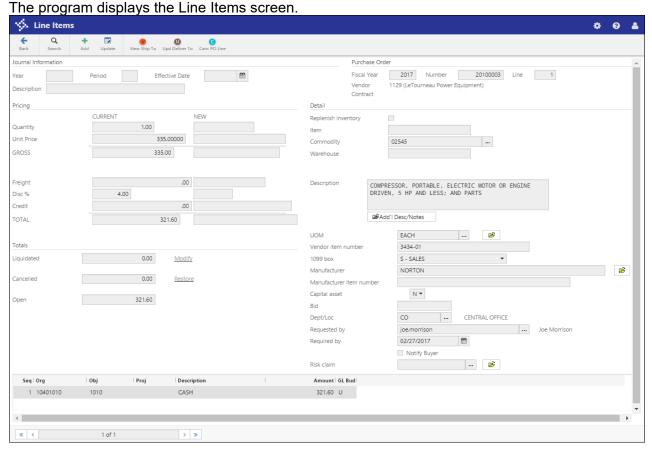
To enter a change order:

- Open the Purchase Order Change Orders program.
 Purchasing > Purchase Order Processing > Purchase Order Change Orders
- 2. Click Search on the toolbar and enter the PO number and Fiscal Year of the PO to be modified.
- Click Accept.
 The program displays the selected purchase order. The status for the Change Order option is N-None.

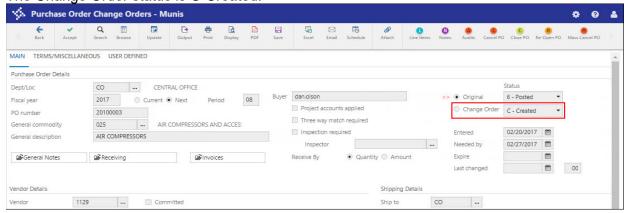


- 4. Click Update on the toolbar to make any required changes on the PO header screen.
- 5. Click Accept to save the changes.

6. Click the Line Items option on the toolbar to update the details.



- 7. Click Update and make changes to the quantity, amount, or account lines as needed.
- 8. Click Accept to save the changes.
- Click Return on the toolbar to return to the PO Header screen. The Change Order status is C-Created.



Click Release to move the change order to the Workflow process.
 The Change Order status is updated to P-Pending.

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Canceling/Closing a Purchase Order

- 1. Email the Activity Department requesting your specific Purchase Order to be canceled or closed.
 - o Include the Purchase Order number
 - o Include a brief reason for closing the PO.
 - Examples: No longer needed, Duplicate, Finished with the PO
 - Make sure that all of your invoices are received and paid on the PO before it is canceled/closed.

Only POs that have a zero open dollar amount with a status of 8-Printed can be closed.