PURCHASING USER MANUAL

MAKING CHANGES TO A PURCHASE ORDER

INTRODUCTION

If a purchase order has been saved or approved, you can add or remove items, add or change vendor, update the price or description of items, etc. You can also reject or cancel an item that is ready to purchase, but not yet added to a purchase order, so that it can be corrected. See the Reject or Cancel a Purchase Order Item documentation. However, a purchase order that has been ordered (but items not received) must first be corrected on the **Receiving** screen.

TO MAKE A CHANGE TO A PURCHASE ORDER

After you have saved or approved a purchase order, you can open it to finish adding items or to make changes to the purchase order.

1. Click the **PO Status** tab.
2. Locate the purchase order to to be changed.
3. Click **Edit** or **Order**. (Typically the status of a saved purchase order is **In Purchasing**.)
4. The purchase order will open on the **PO** screen.

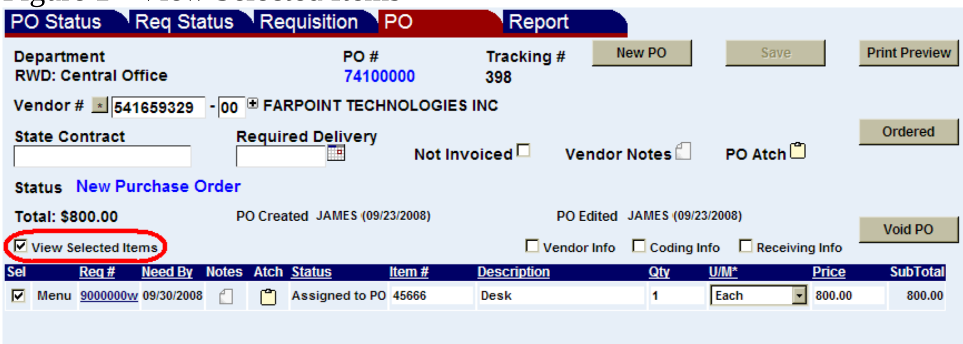
You can make several changes to your purchase order. NOTE: The fiscal coding cannot be changed on the **Purchase Order** screen. The line items have to be rejected using the **Menu** link next to each item so that the fiscal coding can be changed on the **Requisition** screen. See the Reject or Cancel a Purchase Order Item documentation.

5. To change the quantity, price, etc.:
   a. Change the **Item #, Description**, **Qty**, **U.M.**, **Price** fields as needed. Do not use special characters or symbols, including **&**, **'**, **“**, <, and \, in the **Description** field. NOTE: The administrator may have *a limit* on the amount that a purchase order line item amount can vary from the original requisition line item amount.
   b. If needed, click **Menu** next to a line item to take separate actions on each line item. You can also select this menu after you have saved the line items on a purchase order. Actions available include:
      - **Reject Line Item**. Line item is removed from the PO screen and sent back to the requester. The requester can make changes to line item and re-submit it to the process.

- **Cancel Line Item**. The line item cannot be ordered. It is removed from the PO screen and cannot be changed or resubmitted by the requester.
- **Split Line Item**. Split a line item that may need to be purchased by separate item numbers or descriptions. For example, a single line item for a computer may need to be purchased in separate line items as a computer, monitor, keyboard, etc.
- **Edit Vendor Bids**. Used to record which vendors have bid on the line item, if applicable.
- **Show History**. Shows the approval history for the requisition item.
- **Show Full Description**. Shows the full text of the description field.
- **Edit Ship-To Address**. Select a shipping address.
- **Edit Bill-To Address**. Select a billing address.

6. To add or remove items from the purchase order:
   a. Uncheck the **View Selected Items** check box.

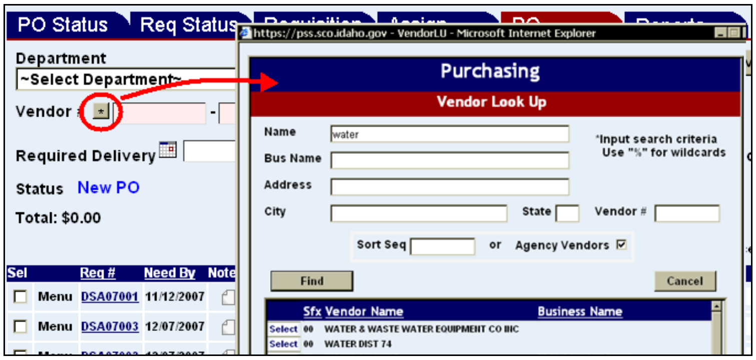
Figure 1 - View Selected Items



   b. Check the **Sel** check box next to any line item you want to add to the purchase order.
   c. Uncheck the **Sel** check box next to any line item you want to remove from the purchase order.

7. To change the vendor for the purchase order, click the **asterisk** next to the **Vendor** # field to **Find** and **Select** a vendor you want to use.

Figure 2 - Find a vendor



8. Click **Save**. You can continue to make changes until you are satisfied that the purchase order is complete or you can save it to come back to later.
9. After the purchase order is saved, do the following depending on your agency's process:
    - Click **Complete**. This button is displayed if you are a Purchaser but not a PO Approver and your agency requires that your purchase orders be approved. The designated purchase order approver must approve them.
    - Click **Approve**. This button is displayed if you are a Purchaser and a PO Approver and your agency requires that your purchase orders be approved.
    - Click **Ordered**. This button is displayed if your agency does not require purchase order approval.

TO UPDATE OR CORRECT PURCHASE ORDER ITEMS THAT HAVE BEEN ORDERED

Purchase order items that have been ordered (but not received) must be corrected on the **Receiving** screen and the purchaser must reject each line item so the requester can update the items on the **Requisition** screen.

1. On the **Receiving** screen:
    a. Check the **Rcv** check box next to each line item received that matches the purchase order and then click **Receive** to mark all items received (even though they have not actually been received).
    b. Click **Correct** on *at least two items* of the purchase order. (If only one item is 'corrected' the other items are received, the purchase order is considered complete and cannot be added to or updated.) If there is only one line item, click **Correct** on that line.
2. On the **Purchase Order** screen:
    a. Open the purchase order, click **Menu** next to the line item(s) that need to be updated, and click **Reject Line Item**.
3. On the **Requisition** screen:
    a. Open the requisition, update the line item(s) as needed, and then click **Itemization Complete**.
    b. Update the fiscal coding as needed and then click **Coding Complete**.
    c. To approve *all* line items of the requisition, click **Approve**. To approve individual line items of the requisition, click **Menu** next to a line item, and then click **Approve Line Item**.
4. On the **Purchase Order** screen:
    a. Open the purchase order and click the **PO** tab.
    b. Check the check boxes next to the updated line items and click **Save**.
    c. The purchase order is ready to be approved (if necessary) and the items will be ready to receive on the **Receiving** screen.