

# **PeopleSoft Training Document**

## **Financials 9.2**

### **Change Orders**

Functional Area	Purchasing
Process Area	
Processes covered in this document	1.1.1 Cancel a Purchase Order 1.1.2 Change a Purchase Order 1.1.3 Re-dispatch
Process Map Reference	Unitec Processes 9.2

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# Changing Purchase Orders

## Objective

To understand how to carry out a change order to a Purchase Order.

This occurs after a Purchase Order has been created and a change needs to be made.

Cancel an order entirely  
Cancel a line in a multiple line PO  
Change the order at the header level  
Change a line in an order

## Overview

### Changes and the Approval Workflow



Cancellations do not re-invoke the approval workflow.

Other changes to a Purchase Order will usually send the PO for approval again.

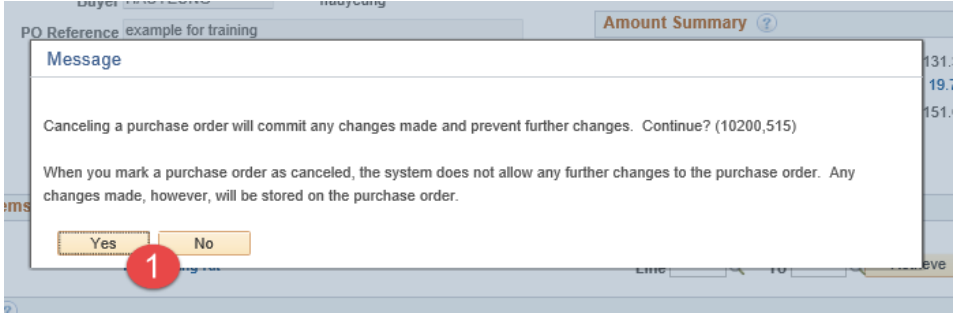
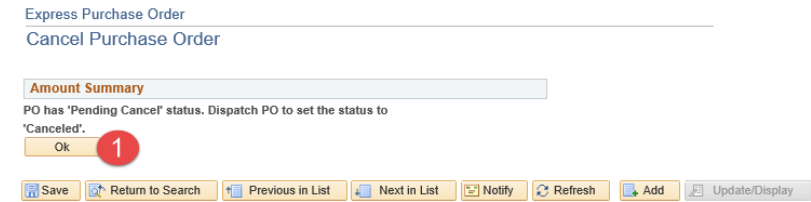
The exceptions are:

- Reduction in quantity on quantity PO lines
- Reductions in amount on amount only PO lines

## Cancelling a Purchase Order

	<p>Error Messages:</p> <p>A Purchase Order cannot be cancelled where:</p> <ul style="list-style-type: none"><li>• A receipt is attached (receipt needs to be cancelled first)</li><li>• An invoice/voucher is attached</li><li>• The PO is in the 'Closed' state</li></ul> <p>If you attempt to cancel such an order you will receive an error message.</p>
	<p>A PO needs to be cancelled where:</p> <ul style="list-style-type: none"><li>• It is a duplicate</li><li>• It was raised against an incorrect supplier</li><li>• We no longer require the goods</li></ul> <p>There may be other reasons for a cancellation.</p>

STEP	CANCEL THE PURCHASE ORDER																																																																																																																								
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







































STEP	CANCEL THE PURCHASE ORDER
1. Click Yes	
1. Click OK	

## Cancel a Purchase Order Line

Use this process when you have produced a multi-line purchase order and you want to cancel just one line of this order.

	<p><b>Error Messages:</b></p> <p>A PO line cannot be cancelled where</p> <ul style="list-style-type: none"> <li>• A receipt is attached (receipt line needs to be cancelled first)</li> <li>• An invoice/voucher is attached</li> <li>• The PO is in the 'Closed' state</li> </ul> <p>If you attempt to cancel such a PO line you will receive an error message.</p>
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STEP	CANCEL A PO LINE
Path	Purchasing WorkCentre > Add/Update Express POs
<p>Search for PO</p> <p>1. Enter PO ID</p> <p>2. Click Search</p>	<p><b>Express Purchase Order</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <a href="#">Find an Existing Value</a> <a href="#">Add a New Value</a> </p> <p>▼ <b>Search Criteria</b></p> <p> Business Unit = ▼ UNITC   PO ID begins with ▼ 0002063502  <b>1</b>  Purchase Order Date = ▼   PO Status = ▼   Short Supplier Name begins with ▼   Supplier ID begins with ▼   Supplier Name begins with ▼   Buyer begins with ▼   Buyer Name begins with ▼   PO Type = ▼   Purchase Order Reference begins with ▼   Hold From Further Processing <input type="checkbox"/>  <input type="checkbox"/> Case Sensitive </p> <p> <a href="#">Search</a> <b>2</b> <a href="#">Clear</a> <a href="#">Basic Search</a> <a href="#">Save Search Criteria</a> </p> <p> <a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a> </p>

STEP	CANCEL A PO LINE																																								
<div>1. Click on Line Details Icon  for the PO line you wish to cancel.</div>	<div><div>Business Unit UNITC PO ID 0002063502</div><div>PO Status Dispatched POA Status Awaiting Acknowledgement <input type="checkbox"/> Hold From Further Processing</div><div>Copy From <input type="text"/></div><div>Header   PO Date 19/12/2016  Supplier Search </div><div>VA1 Actions</div><div>Add Items From   Select Lines To Display   Search for Lines Line <input type="text"/> To <input type="text"/> Retrieve </div><div><table><thead><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td></td><td>Paper clips x boxes</td><td>10.0000</td><td>EA</td><td>269500</td><td>85.50</td><td>Approved</td></tr><tr><td>2</td><td></td><td>235 characters remaining Pencils Staedler x 20 per box</td><td>10.0000</td><td>EA</td><td>269500</td><td>152.50</td><td>Approved</td></tr><tr><td>3</td><td></td><td>225 characters remaining Standup stapler</td><td>6.0000</td><td>EA</td><td>269500</td><td>216.00</td><td>Approved</td></tr><tr><td>4</td><td></td><td>239 characters remaining staples</td><td>25.0000</td><td>EA</td><td>269500</td><td>123.75</td><td>Approved</td></tr></tbody></table><div>Expand All Collapse All View Printable Version View Approvals</div></div><div>Go to ... More ... </div></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Paper clips x boxes	10.0000	EA	269500	85.50	Approved	2		235 characters remaining Pencils Staedler x 20 per box	10.0000	EA	269500	152.50	Approved	3		225 characters remaining Standup stapler	6.0000	EA	269500	216.00	Approved	4		239 characters remaining staples	25.0000	EA	269500	123.75	Approved
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<div>A Pop Up will open for the relevant line. 1. Click on the Cancel  icon</div>	<div><div>Details for Line 3 </div><div>PO ID 0002063502 Line 3 Supplier OFFIMAX-001 Item ID <a href="#">Standup stapler</a></div><div>Line Details</div><div>Category 269500 Description Stationery &amp; Office Supplies Category ID 00314 Amount to Receive 216.00 Quantity to Receive 6.0000 NZD</div><div>Line Status Approved Backorder Status Not Backordered</div><div>Amount Summary</div><div>Merchandise Amount 216.00 Doc. Base Amt 216.00 NZD</div><div>Transaction Item Description Standup stapler</div><div>Preferred Language Item Description</div><div>Expand All Collapse All</div><div><div>Item Information</div><div>Attributes</div><div>RFQ</div><div>Contract</div><div>Receiving</div></div><div>OK Cancel Refresh</div></div>																																								
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<div>Line 3 is now marked as cancelled. 1. Click Save </div>	<div><div>Lines </div><div><table><thead><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td></td><td>Paper clips x boxes</td><td>10.0000</td><td>EA</td><td>269500</td><td>85.50</td><td>Approved</td></tr><tr><td>2</td><td></td><td>235 characters remaining Pencils Staedler x 20 per box</td><td>10.0000</td><td>EA</td><td>269500</td><td>152.50</td><td>Approved</td></tr><tr><td>3</td><td></td><td>225 characters remaining Standup stapler</td><td>6.0000</td><td>EA</td><td>269500</td><td>216.00</td><td>Canceled</td></tr><tr><td>4</td><td></td><td>239 characters remaining staples</td><td>25.0000</td><td>EA</td><td>269500</td><td>123.75</td><td>Approved</td></tr></tbody></table><div>Expand All Collapse All View Printable Version View Approvals</div></div><div>Go to ... More ... </div><div>Save  Return to Search  Notify  Refresh  Add  Update/Display </div></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1		Paper clips x boxes	10.0000	EA	269500	85.50	Approved	2		235 characters remaining Pencils Staedler x 20 per box	10.0000	EA	269500	152.50	Approved	3		225 characters remaining Standup stapler	6.0000	EA	269500	216.00	Canceled	4		239 characters remaining staples	25.0000	EA	269500	123.75	Approved
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## Change Order – Header

Use this process to change details that affect the entire Purchase Order. Changes to the header comments or the insertion of a CAPEX authority would be changes at the header level.

Example: Change an Approval Justification where a PO has been denied due to missing approval justification

STEP	CHANGE AN APPROVAL JUSTIFICATION – PO DENIED
Path	Purchasing WorkCentre > Add/Update Express POs
Search for PO	<div><div>Express Purchase Order</div><div>Enter any information you have and click Search. Leave fields blank for a list of all values.</div><div><div>Find an Existing Value</div><div>Add a New Value</div></div><div><div>▼ Search Criteria</div><div><div>Business Unit</div><div>=</div><div>UNITC</div><div></div></div><div><div>PO ID</div><div>begins with</div><div>0002063502</div><div></div></div><div><div>Purchase Order Date</div><div>=</div><div></div><div></div></div><div><div>PO Status</div><div>=</div><div></div><div></div></div><div><div>Short Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Supplier ID</div><div>begins with</div><div></div><div></div></div><div><div>Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Buyer</div><div>begins with</div><div></div><div></div></div><div><div>Buyer Name</div><div>begins with</div><div></div><div></div></div><div><div>PO Type</div><div>=</div><div></div><div></div></div><div><div>Purchase Order Reference</div><div>begins with</div><div></div></div><div><div>Hold From Further Processing</div><div><input type="checkbox"/></div></div><div><div><input type="checkbox"/> Case Sensitive</div></div><div><div>Search</div><div>Clear</div><div>Basic Search</div><div></div><div>Save Search Criteria</div></div><div><div>Find an Existing Value</div><div> </div><div>Add a New Value</div></div></div></div>
1. Click on the "Add Comments" link	<div><div>Express Purchase Order</div><div>Purchase Order</div><div><div>Business Unit</div><div>UNITC</div></div><div><div>PO ID</div><div>0002063518</div></div><div><div>Copy From</div><div></div><div></div></div><div><div>▼ Header</div><div><div>*PO Date</div><div>24/01/2017</div><div></div></div><div><div>*Supplier</div><div>HILLPRO-001</div><div></div></div><div><div>*Supplier ID</div><div>0000035572</div><div></div></div><div><div>*Buyer</div><div>JRICHARDS</div><div></div></div><div><div>PO Reference</div><div></div></div><div><div>Supplier Search</div></div><div><div>Supplier Details</div></div><div><div>Hillcrest Promotions 2009 Ltd</div></div><div><div>jrichards</div></div><div><div>Header Details</div></div><div><div>PO Defaults</div></div><div><div>PO Activities</div></div><div><div>Requisitions</div></div><div><div>Header VAT</div></div><div><div>▼ Actions</div></div><div><div>Activity Summary</div></div><div><div>Add Comments</div></div><div><div>Add ShipTo Comments</div></div><div><div>Document Status</div></div></div><div><div>PO Status</div><div>Denied</div><div></div></div><div><div>POA Status</div><div>Awaiting PO Dispatch</div></div><div><div><input type="checkbox"/> Hold From Further Processing</div></div><div><div>Receipt Status</div><div>Not Recvd</div></div><div><div>*Dispatch Method</div><div>Print</div><div></div></div><div><div>Dispatch</div></div><div><div>Amount Summary</div><div></div></div><div><div>Merchandise</div><div>183.00</div></div><div><div>Freight/Tax/Misc.</div><div>27.45</div></div><div><div>Total Amount</div><div>210.45</div><div>NZD</div></div><div><div>Calculate</div></div></div>



1. Tick Approval Justification

2. Enter Comments and Attachments

3. Click OK

PO Header Comments

Business Unit UNITC PO ID 0002063518 Supplier HILLPRO-001

☒ Retrieve Active Comments Only Retrieve

\*Sort Method Comment Time Stamp

\*Sort Sequence Ascending

Sort

Comments

Find | View All First 1 of 1 Last

Use Standard Comments

Comment Status Active

Inactivate

Canvas bags for printing with Unitec Logo's in the Copy Centre

☐ Send to Supplier
 ☐ Show at Receipt

☐ Show at Voucher
 ☒ Approval Justification

Associated Document

Attachment Panic\_JPEG.jpg

Attach View Delete Email

From -> PO UNITC-0002063518

OK

Cancel

Refresh

3. Click

Save

Note: that the PO status has changed from 'Denied' to 'Pending Approval' and the Approval Workflow has been restarted.

Express Purchase Order

Purchase Order

Business Unit UNITC PO ID 0002063518

PO Status Pending Appr

POA Status Awaiting PO Dispatch

☐ Hold From Further Processing

Copy From

Header

\*PO Date 24/01/2017

\*Supplier HILLPRO-001

\*Supplier ID 0000035572

\*Buyer JRICHARDS

PO Reference

Supplier Search

Supplier Details

Hillcrest Promotions 2009 Ltd

richards

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Header VAT

Actions

Receipt Status Not Recvd

\*Dispatch Method Print

Dispatch

Amount Summary

Merchandise 183.00

Freight/Tax/Misc. 27.45

Total Amount 210.45 NZD

Calculate

Add Items From

Catalog

Item Search

Purchasing Kit

Select Lines To Display

Search for Lines

Line To Retrieve

Lines

Line Item Description PO Qty \*UOM Category Merchandise Amt Status

1

Black and white canvas tote bags - x 100

100.0000

EA

204500

183.00

Pending

214 characters remaining

Expand All

Collapse All

View Printable Version

View Approvals

Go to ... More ...

Save

Return to Search

Notify


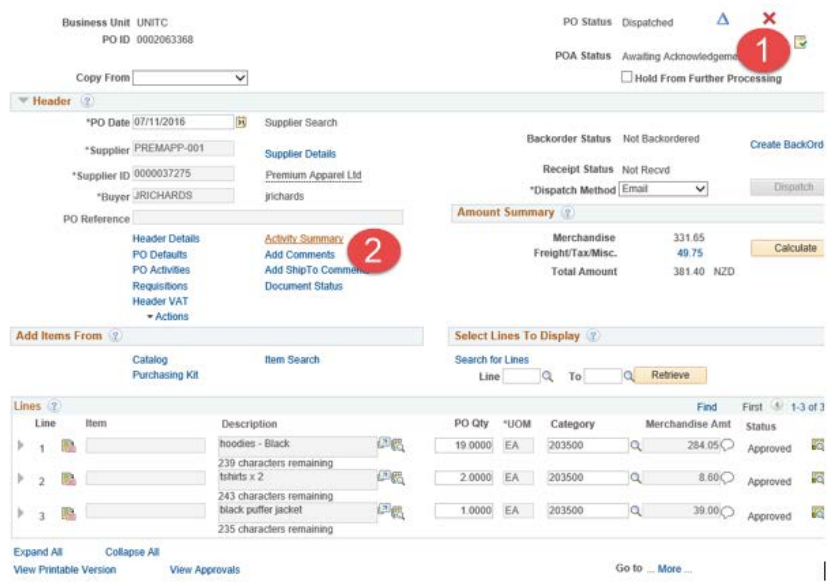
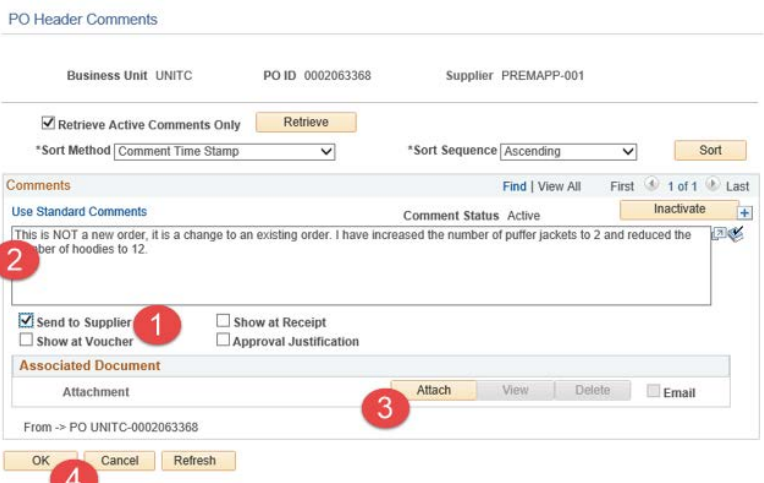
Refresh

Add

Page 9 of 18

## Example: Change a previously approved PO at the Header level

In this scenario we want to reduce the PO and advise the vendor that we have done so. To be sure they notice, we want to attach a comment to be sent to the supplier when the PO is dispatched.

STEP	CHANGE ORDER – ADD SUPPLIER COMMENTS
Path	Purchasing WorkCentre > Add/Update Express POs
<p>Search for and open the Purchase Order</p> <p>1. Click on the Change Icon  in the top right corner</p> <p>2. Click on Add Comments link</p>	
<p>3. Tick the 'Send to Supplier' box</p> <p>4. Add the comment you want to send to the supplier</p> <p>5. You may add an attachment if required</p> <p>6. Click OK.</p>	

1. You now edit the line information as required. Example PO quantities have been altered

2. Click Calculate

Express Purchase Order  
Purchase Order

Business Unit: UNITC  
PO ID: 0002063368  
Change Order: 1  
Copy From: [dropdown]

PO Status: Pend Appr  
POA Status: Initial Dispatch Acknowledged  
☐ Hold From Further Processing

\*PO Date: 07/11/2016  
\*Supplier: PREMAPP-001  
\*Supplier ID: 0000037275  
\*Buyer: JRICHARDS  
PO Reference: [text]

Supplier Search  
Supplier Details: Premium Apparel Ltd  
Backorder Status: Not Backordered  
Receipt Status: Not Recvd  
\*Dispatch Method: Email

Amount Summary  
Merchandise: 266.00  
Freight/Tax/Misc.: 39.90  
Total Amount: 305.90 NZD

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Header VAT  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Add Items From: [dropdown]  
Catalog  
Purchasing Kit

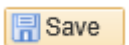
Select Lines To Display: [dropdown]  
Search for Lines  
Line: [text] To: [text] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	hoodies - Black	239 characters remaining	12.0000	EA	203500	179.40	Pending
2	tshirts x 2	243 characters remaining	2.0000	EA	203500	6.60	Pending
3	black puffer jacket	235 characters remaining	2.0000	EA	203500	78.00	Pending

Expand All Collapse All  
View Printable Version View Approvals

Go to ... More ...

1. Click



Express Purchase Order  
Purchase Order

Business Unit: UNITC  
PO ID: 0002063368  
Change Order: 1  
Copy From: [dropdown]

PO Status: Pend Appr  
POA Status: Initial Dispatch Acknowledged  
☐ Hold From Further Processing

\*PO Date: 07/11/2016  
\*Supplier: PREMAPP-001  
\*Supplier ID: 0000037275  
\*Buyer: JRICHARDS  
PO Reference: [text]

Supplier Search  
Supplier Details: Premium Apparel Ltd  
Backorder Status: Not Backordered  
Receipt Status: Not Recvd  
\*Dispatch Method: Email

Amount Summary  
Merchandise: 266.00  
Freight/Tax/Misc.: 39.90  
Total Amount: 305.90 NZD

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Header VAT  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Add Items From: [dropdown]  
Catalog  
Purchasing Kit

Select Lines To Display: [dropdown]  
Search for Lines  
Line: [text] To: [text] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	hoodies - Black	239 characters remaining	12.0000	EA	203500	179.40	Pending
2	tshirts x 2	243 characters remaining	2.0000	EA	203500	6.60	Pending
3	black puffer jacket	235 characters remaining	2.0000	EA	203500	78.00	Pending

Expand All Collapse All  
View Printable Version View Approvals

Go to ... More ...

Save Return to Search Notify Refresh

Add Update/Display

Because this change includes an increase for one of the lines the PO is now pending approval

Express Purchase Order  
Purchase Order

Business Unit: UNITC  
PO ID: 0002063368  
Change Order: 1  
Copy From: [dropdown]

PO Status: Pend Appr  
POA Status: Initial Dispatch Acknowledged  
☐ Hold From Further Processing

\*PO Date: 07/11/2016  
\*Supplier: PREMAPP-001  
\*Supplier ID: 0000037275  
\*Buyer: JRICHARDS  
PO Reference: [text]

Supplier Search  
Supplier Details: Premium Apparel Ltd  
Backorder Status: Not Backordered  
Receipt Status: Not Recvd  
\*Dispatch Method: Email

Amount Summary  
Merchandise: 266.00  
Freight/Tax/Misc.: 39.90  
Total Amount: 305.90 NZD

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Header VAT  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Add Items From: [dropdown]  
Catalog  
Purchasing Kit

Select Lines To Display: [dropdown]  
Search for Lines  
Line: [text] To: [text] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
2	tshirts x 2	243 characters remaining	2.0000	EA	203500	6.60	Pending
3	black puffer jacket	235 characters remaining	2.0000	EA	203500	78.00	Pending

Expand All Collapse All  
View Printable Version View Approvals

Go to ... More ...

Save Return to Search Notify Refresh


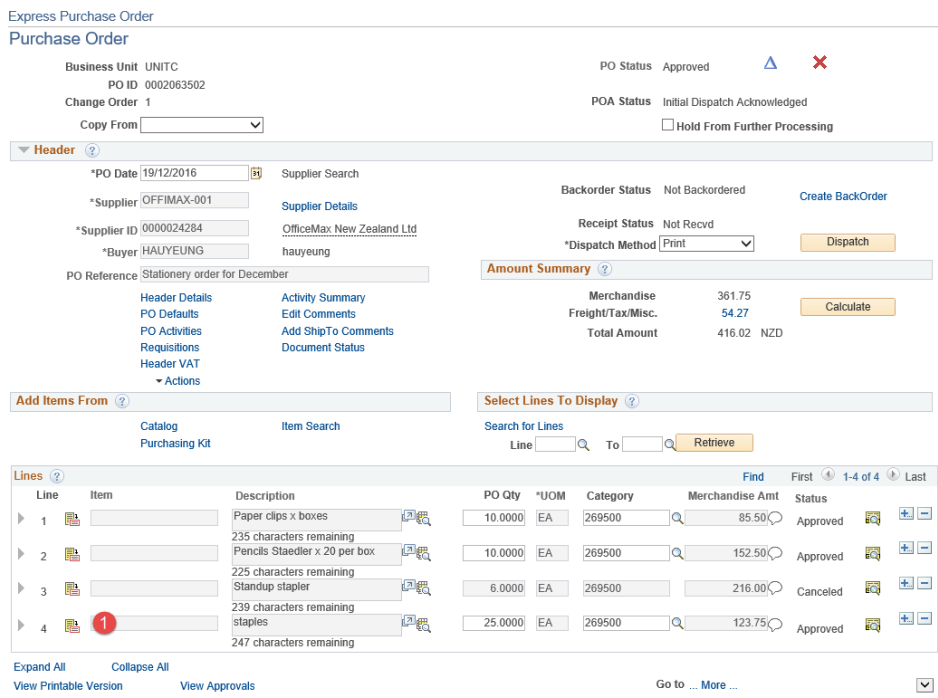
Add Update/Display



## Change Order – Line

Use this process to change details at the line level of a Purchase Order – may be a price or quantity change, or keying error.

You can also add or change project information, change the Purchasing Category, GL code or cost centre. The basic principles are the same as those described here.

Example: Change the unit price in a quantity PO line

STEP	CHANGE ORDER - LINE
Path	Purchasing WorkCentre > Add/Update Express POs
<p>Search for and open the Purchase Order</p> <p>1. Click on Line Details Icon</p> 	 <p>The screenshot displays the 'Express Purchase Order' screen. At the top, it shows the PO ID 0002063502 and its status as 'Approved'. Below this, there are fields for Business Unit (UNITC), PO ID, and Change Order (1). The 'Header' section includes fields for PO Date (19/12/2016), Supplier (OFFIMAX-001), Supplier ID (0000024284), and Buyer (HAUYEUNG). The 'Amount Summary' section shows Merchandise (361.75), Freight/Tax/Misc. (54.27), and Total Amount (416.02 NZD). The 'Lines' table at the bottom lists four items: Paper clips x boxes, Pencils Staedler x 20 per box, Standup stapler, and staples. Line 4, which corresponds to 'staples', is highlighted with a red circle and the number 1, indicating it is the target line for the change.</p>

STEP	CHANGE ORDER - LINE																																																								
2. Click Line Change Icon 	<div><div>Details for Line 4</div><div><div>PO ID 0002063502</div><div>Supplier OFFIMAX-001</div><div>Line 4</div><div>Item ID staples</div></div><div><div>Line Details</div><div><div>Category 269500</div><div>Description Stationery &amp; Office Supplies</div><div>Category ID 00314</div><div>Amount to Receive 123.750</div><div>Quantity to Receive 25.0000</div><div>NZD</div></div><div><div>Line Status Approved</div><div>Backorder Status Not Backordered</div><div>Amount Summary</div><div><div>Merchandise Amount 123.75</div><div>Doc. Base Amt 123.75</div><div>NZD</div><div>NZD</div></div></div><div><div>Transaction Item Description</div><div>staples</div><div>Preferred Language Item Description</div></div><div><div>Expand All</div><div>Collapse All</div><div><div>Item Information</div><div>Attributes</div><div>RFQ</div><div>Contract</div><div>Receiving</div></div><div><div>OK</div><div>Cancel</div><div>Refresh</div></div></div></div></div>																																																								
The line schedule is now available for editing.  Change of price  1. Update the price in the price field	<div><div><div>Requisitions</div><div>Header VAT</div><div>Document Status</div><div>Actions</div></div><div><div>Add Items From</div><div>Catalog</div><div>Purchasing Kit</div><div>Item Search</div><div>Search for Lines</div><div>Line</div><div>To</div><div>Retrieve</div></div><div><div>Lines</div><div><table><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr><tr><td>3</td><td>standup stapler</td><td>239 characters remaining</td><td>6.0000</td><td>EA</td><td>269500</td><td>216.00</td><td>Canceled</td></tr><tr><td>4</td><td>staples</td><td>247 characters remaining</td><td>25.0000</td><td>EA</td><td>269500</td><td>123.75</td><td>Approved</td></tr></table></div><div><div>Schedules</div><div><table><tr><th>Sched</th><th>*Due Date</th><th>*Ship To</th><th>*PO Qty</th><th>Price</th><th>Merchandise Amt</th><th>Status</th><th>*Distribute by</th></tr><tr><td>1</td><td>19/12/2016</td><td>INWARD_GD</td><td>25.0000</td><td>5.50 x</td><td>123.75</td><td>Active</td><td>Quantity</td></tr></table></div></div><div><div>Expand All</div><div>Collapse All</div><div>View Printable Version</div><div>View Approvals</div><div>Go to ... More ...</div></div></div></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	3	standup stapler	239 characters remaining	6.0000	EA	269500	216.00	Canceled	4	staples	247 characters remaining	25.0000	EA	269500	123.75	Approved	Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by	1	19/12/2016	INWARD_GD	25.0000	5.50 x	123.75	Active	Quantity																
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1. Click 	<div><div><div>Purchasing Kit</div><div>Line</div><div>To</div><div>Retrieve</div></div><div><div>Lines</div><div><table><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr><tr><td>1</td><td>Paper clips x boxes</td><td>235 characters remaining</td><td>10.0000</td><td>EA</td><td>269500</td><td>85.50</td><td>Approved</td></tr><tr><td>2</td><td>Pencils Staedler x 20 per box</td><td>225 characters remaining</td><td>10.0000</td><td>EA</td><td>269500</td><td>152.50</td><td>Approved</td></tr><tr><td>3</td><td>Standup stapler</td><td>239 characters remaining</td><td>6.0000</td><td>EA</td><td>269500</td><td>216.00</td><td>Canceled</td></tr><tr><td>4</td><td>staples</td><td>247 characters remaining</td><td>25.0000</td><td>EA</td><td>269500</td><td>123.75</td><td>Approved</td></tr></table></div><div><div>Schedules</div><div><table><tr><th>Sched</th><th>*Due Date</th><th>*Ship To</th><th>*PO Qty</th><th>Price</th><th>Merchandise Amt</th><th>Status</th><th>*Distribute by</th></tr><tr><td>1</td><td>19/12/2016</td><td>INWARD_GD</td><td>25.0000</td><td>5.50 x</td><td>123.75</td><td>Active</td><td>Quantity</td></tr></table></div></div><div><div>Expand All</div><div>Collapse All</div><div>View Printable Version</div><div>View Approvals</div><div>Go to ... More ...</div></div><div><div>Save</div><div>Return to Search</div><div>Notify</div><div>Refresh</div><div>Add</div><div>Update/Display</div></div></div></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1	Paper clips x boxes	235 characters remaining	10.0000	EA	269500	85.50	Approved	2	Pencils Staedler x 20 per box	225 characters remaining	10.0000	EA	269500	152.50	Approved	3	Standup stapler	239 characters remaining	6.0000	EA	269500	216.00	Canceled	4	staples	247 characters remaining	25.0000	EA	269500	123.75	Approved	Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by	1	19/12/2016	INWARD_GD	25.0000	5.50 x	123.75	Active	Quantity
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1	19/12/2016	INWARD_GD	25.0000	5.50 x	123.75	Active	Quantity																																																		

STEP	CHANGE ORDER - LINE
<p>1. Because this change is an increase in price, it routes through for re-approval.</p>	<div> <div>Express Purchase Order</div> <div>Purchase Order</div> <div> <div>Business Unit UNITC</div> <div>PO ID 0002063502</div> <div>Change Order 1</div> <div>Copy From <span></span></div> </div> <div> <div>PO Status Pend Appr <span></span> <span></span></div> <div>POA Status Initial Dispatch Acknowledged</div> <div><input type="checkbox"/> Hold From Further Processing</div> </div> <div> <div>Header <span></span></div> <div> <div>*PO Date 19/12/2016 <span></span></div> <div>*Supplier OFFIMAX-001</div> <div>*Supplier ID 0000024284</div> <div>*Buyer HAUYEUNG</div> </div> <div> <div>Supplier Search</div> <div>Supplier Details</div> <div>OfficeMax New Zealand Ltd</div> <div>haueyung</div> </div> <div> <div>Receipt Status Not Recvd</div> <div>*Dispatch Method Print <span></span></div> <div>Dispatch <span></span></div> </div> </div> <div> <div>Review Lines</div> <div>Review / Edit Approvers</div> <div>Unitec PO Workflow</div> <div> <div>Purchase Order 0002063502:Pending</div> <div>View/Hide Comments</div> <div>Start New Path</div> <div> <div>Department</div> <div> <div>Skipped</div> <div>No approvers found</div> <div>PO Step 1 / Dept - Max 1k</div> </div> <div>→</div> <div> <div>Skipped</div> <div>No approvers found</div> <div>PO Step 2 / Dept - Max 1.5k</div> </div> <div>→</div> <div> <div>Skipped</div> <div>No approvers found</div> <div>PO Step 3 / Dept - Max 5k</div> </div> <div>→</div> <div> <div>Pending</div> <div>mwilliam</div> <div>PO Step 4 / Dept - Max 10k</div> </div> </div> <div>Comment History</div> </div> <div>Return to Purchase Order</div> </div> </div>
<p>The system reflects the Change Order – this will change by increment for each change you make.</p>	<div> <div>Express Purchase Order</div> <div>Purchase Order</div> <div> <div>Business Unit UNITC</div> <div>PO ID 0002063502</div> <div>Change Order 1</div> <div>Copy From <span></span></div> </div> <div> <div>PO Status Pend Appr <span></span> <span></span></div> <div>POA Status Initial Dispatch Acknowledged</div> <div><input type="checkbox"/> Hold From Further Processing</div> </div> <div> <div>Header <span></span></div> <div> <div>*PO Date 19/12/2016 <span></span></div> <div>*Supplier OFFIMAX-001</div> <div>*Supplier ID 0000024284</div> <div>*Buyer HAUYEUNG</div> </div> <div> <div>Supplier Search</div> <div>Supplier Details</div> <div>OfficeMax New Zealand Ltd</div> <div>haueyung</div> </div> <div> <div>Backorder Status Not Backordered</div> <div>Create BackOrder</div> </div> <div> <div>Receipt Status Not Recvd</div> <div>*Dispatch Method Print <span></span></div> <div>Dispatch <span></span></div> </div> </div> <div> <div>PO Reference Stationery order for December</div> <div> <div>Header Details</div> <div>Activity Summary</div> <div>PO Defaults</div> <div>Edit Comments</div> <div>PO Activities</div> <div>Add ShipTo Comments</div> <div>Requisitions</div> <div>Document Status</div> <div>Header VAT</div> <div>Actions</div> </div> <div> <div>Amount Summary <span></span></div> <div> <div>Merchandise 375.50</div> <div>Freight/Tax/Misc. 56.34</div> <div>Total Amount 431.84 NZD</div> </div> <div>Calculate <span></span></div> </div> </div> </div>

## Example: Convert a PO line from a quantity order to an amount order

A PO has been created for training. The PO was raised as a quantity PO with a quantity of 1 and a price of \$400. However, the supplier submits two invoices, one @\$150 for the preparation work and one @\$250 for the actual session. To accommodate this we need to change the PO line from a quantity line to an amount only line.

	<p>We will only be able to make this change while there is no receipt or invoice processed against the order. If there is a receipt, please cancel this first.</p> <p>If an invoice has already been processed you will need to liaise with Accounts Payable to resolve this.</p>
--	---

STEP	CONVERT A PO LINE FROM QUANTITY TO AMOUNT ONLY																
Path	Purchasing WorkCentre > Add/Update Express POs																
Search for PO	<div>Express Purchase Order</div> <div>Enter any information you have and click Search. Leave fields blank for a list of all values.</div> <div><div>Find an Existing Value</div><div>Add a New Value</div></div> <div><div>▼ Search Criteria</div><div><div>Business Unit</div><div>=</div><div>UNITC</div><div>UNITC</div></div><div><div>PO ID</div><div>begins with</div><div>0002063520</div><div>0002063520</div></div><div><div>Purchase Order Date</div><div>=</div><div></div><div></div></div><div><div>PO Status</div><div>=</div><div></div><div></div></div><div><div>Short Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Supplier ID</div><div>begins with</div><div></div><div></div></div><div><div>Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Buyer</div><div>begins with</div><div></div><div></div></div><div><div>Buyer Name</div><div>begins with</div><div></div><div></div></div><div><div>PO Type</div><div>=</div><div></div><div></div></div><div><div>Purchase Order Reference</div><div>begins with</div><div></div><div></div></div><div><div>Hold From Further Processing</div><div></div></div><div><div>Case Sensitive</div><div></div></div><div><div>Search</div><div>Clear</div><div>Basic Search</div><div>Save Search Criteria</div></div><div><div>Find an Existing Value</div><div>Add a New Value</div></div></div>																
1. Click on Line Details Icon	<div><div>Purchase Order Inquiry</div><div>Purchase Order</div><div><div>Business Unit</div><div>UNITC</div><div>PO ID</div><div>0002063520</div><div>Change Order</div><div>1</div></div><div><div>PO Status</div><div>Dispatched</div><div>POA Status</div><div>Initial Dispatch Acknowledged</div></div><div><div>▼ Header</div><div><div>PO Date</div><div>24/01/2017</div><div>Supplier Name</div><div>BERRSUS-002</div><div>Supplier ID</div><div>0000035292</div><div>Buyer</div><div>Karen Rogers</div><div>PO Reference</div><div></div></div><div><div>Supplier Details</div><div><div>Backorder Status</div><div>Not Backordered</div><div>Receipt Status</div><div>Not Recvd</div><div>Hold From Further Processing</div></div></div><div><div>Amount Summary</div><div><div>Merchandise</div><div>400.00</div><div>Freight/Tax/Misc.</div><div>0.00</div><div>Total</div><div>400.00 NZD</div></div></div><div><div>Header Details</div><div>Change Order</div><div>All RTV</div><div>Matching</div><div>Header VAT</div><div>Activity Summary</div><div>Header Comments...</div><div>Document Status</div><div>Actions</div></div></div><div><div>Lines</div><div>Personalize</div><div>Find</div><div>View All</div><div>First</div><div>1 of 1</div><div>Last</div><table><thead><tr><th>Line</th><th>Item ID</th><th>Item Description</th><th>Category</th><th>PO Qty</th><th>UOM</th><th>Merchandise Amount</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td></td><td>Professional services for Trai</td><td>245720</td><td>1.0000</td><td>HR</td><td>400.00 NZD</td><td>Approved</td></tr></tbody></table><div><div>View Approvals</div><div>Cancel</div></div></div></div>	Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status	1		Professional services for Trai	245720	1.0000	HR	400.00 NZD	Approved
Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status										
1		Professional services for Trai	245720	1.0000	HR	400.00 NZD	Approved										

1. Expand the "Attributes" section

Orientation February 2017

**Line Details**

Category 245720  
Description Casual Allied Administration  
Category ID 00213  
Amount to Receive 400.000 NZD  
Quantity to Receive 1.0000

Line Status Approved  
Backorder Status Not Backordered

**Amount Summary**

Merchandise Amount 400.00 NZD  
Doc. Base Amt 400.00 NZD

Transaction Item Description  
Professional services for Training session for IT Student Orientation February 2017

Preferred Language Item Description

Expand All Collapse All

Item Information  
Attributes  
RFQ  
Contract  
Receiving

OK Cancel Refresh

1. Click the Amount Only option
2. Select

OK

Details for Line 1

PO ID 0002063520 Supplier BERRSUS-002  
Line 1 Item ID Professional services for Training session for IT Student Orientation February 2017

**Line Details**

Category 245720  
Description Casual Allied Administration  
Category ID 00213  
Amount to Receive 400.000 NZD  
Quantity to Receive 1.0000

Line Status Approved  
Backorder Status Not Backordered

**Amount Summary**

Merchandise Amount 400.00 NZD  
Doc. Base Amt 400.00 NZD

Transaction Item Description  
Professional services for Training session for IT Student Orientation February 2017

Preferred Language Item Description

Expand All Collapse All

Item Information  
Attributes  
RFQ  
Contract  
Receiving

Physical Nature Goods  
\*Price Qty Schedule Quantity  
\*Price Date PO  
Amount Only

OK Cancel Refresh

You will receive a warning message explaining the change.

1. If you wish to continue select "yes"

0035292 Susan Bermidge  
OGERS Karen Rogers  
Receipt Status Not Recvd  
\*Dispatch Method Email  
Dispatch

**Amount Summary**

Calculate

**Message**

The PO Qty will be 1 for an amount only line, the system will recalculate the merchandise amount (10200,273)

The PO Quantity will be 1 for an amount only line, the system will recalculate the merchandise amount, Continue?

Yes No Cancel

Line To Retrieve

Find First 1 of 1

Description PO Qty \*UOM Category Merchandise Amt Status



1. Save the change.

Note that this change has not triggered the approval workflow. You will however need to dispatch the PO again.

Express Purchase Order  
Purchase Order

Business Unit UNITC  
PO ID 0002063520  
Change Order 1  
Copy From

PO Status Approved  
POA Status Initial Dispatch Act  
☐ Hold From Fur

**Header**

\*PO Date 24/01/2017  
\*Supplier BERRSUS-002  
\*Supplier ID 0000035292  
\*Buyer KROGERS  
PO Reference

Supplier Search  
Supplier Details  
Susan Bernidge  
Karen Rogers

Receipt Status Not Recvd  
\*Dispatch Method Email

**Amount Summary**

Merchandise	400.00
Freight/Tax/Misc.	0.00
Total Amount	400.00

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Header VAT  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

**Add Items From**

Catalog  
Purchasing Kit

**Select Lines To Display**

Search for Lines  
Line  To  Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Merchandise
1		Professional services for Training services for IT Student 171 characters remaining	1.0000	HR	245720	400

**Schedules**

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by
1	24/01/2017	INWARD_GD	1.0000	400.00000	400.00	Active	Amount

Expand All  
Collapse All  
View Printable Version  
View Approvals

Go to ... More ...

Save Return to Search Notify Refresh

Please note...

If the change is an increase of quantity or price or affects cost centres, GL, Project Information or approval justification– re-approval is required

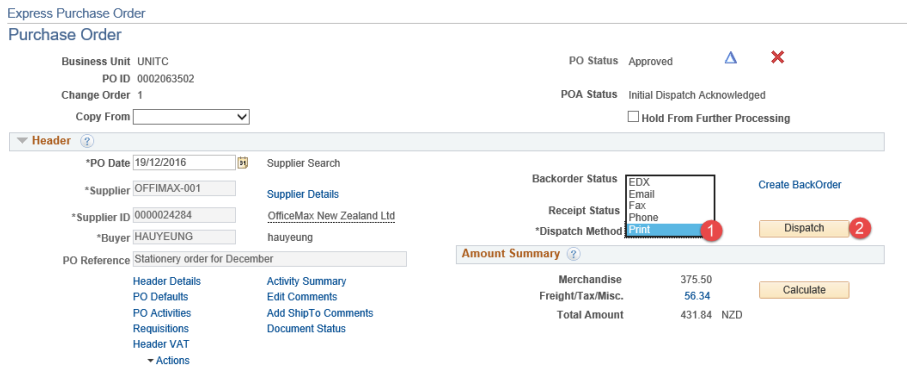
Only if the change is a reduction of quantity or amount – re-approval is not required. In this case, if the PO was dispatched before the change was made, it will revert to the approved state. Otherwise it will remain in the state it was before the change.

## Re-dispatch

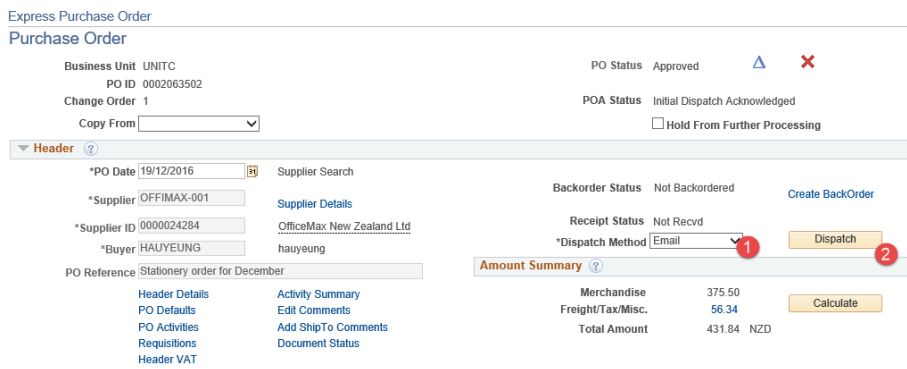
In theory, we should always re-dispatch a changed order to the supplier – the idea is that they need to know that we have made a change. However in practice this may not always be necessary or may cause confusion. In those cases we should change the dispatch method to 'print' to prevent automatic dispatch of the order.

Example: We do not want to re-send the PO to the supplier

If a change order is being created to fix a Match Exception, the order should not be re-sent through to the supplier.

STEP	RE-DISPATCH
Path	Purchasing WorkCentre > Add/Update Express POs
<p>Once approval has been received for the changes,</p> <ul style="list-style-type: none"> <li>Search for and open the changed order</li> </ul> <p>1. Change the Dispatch method to <b>Print</b></p> <p>2. Click Dispatch</p>	 <p>The screenshot shows the 'Express Purchase Order' form. The 'Dispatch Method' dropdown is set to 'Print' (indicated by a red circle with a '1'). The 'Dispatch' button is highlighted with a red circle and a '2'. The form includes fields for Business Unit (UNITC), PO ID (0002063502), Change Order (1), and various status indicators like PO Status (Approved) and POA Status (Initial Dispatch Acknowledged). The 'Amount Summary' table shows Merchandise (375.50), Freight/Tax/Misc. (56.34), and Total Amount (431.84 NZD).</p>

We have made a change that needs to be notified to the supplier

STEP	RE-DISPATCH
Path	Purchasing WorkCentre > Add/Update Express POs
<p>Once approval has been received for the changes,</p> <p>1. Leave the Dispatch method as <b>email</b></p> <p>2. Click Dispatch</p>	 <p>The screenshot shows the 'Express Purchase Order' form. The 'Dispatch Method' dropdown is set to 'Email' (indicated by a red circle with a '1'). The 'Dispatch' button is highlighted with a red circle and a '2'. The form includes fields for Business Unit (UNITC), PO ID (0002063502), Change Order (1), and various status indicators like PO Status (Approved) and POA Status (Initial Dispatch Acknowledged). The 'Amount Summary' table shows Merchandise (375.50), Freight/Tax/Misc. (56.34), and Total Amount (431.84 NZD).</p>