PO Change Order Business Process Overview

Purchase orders can be changed, re-edited and re-budget checked any time prior to dispatching. However, once a PO is dispatched certain fields can only be changed through a change order. The blue triangle change icon appears for all POs that will allow a change order. To create a change order, you will use the same pages used when creating a purchase order, except you will be updating a dispatched purchase order and, for this reason, there is a slightly different technique.

Note: Once a PO Line has been Vouchered, the Distribution ChartString can no longer be changed.

Purchase Orders can be changed separately at the Header, Line, or Schedule level. Changes made determine if the PO can be Saved only, Dispatched, or Budget Checked and Dispatched. Generally, changes that do not involve quantity, dollar amount or distribution line accounting codes will require dispatch only. Changes to quantity, price, and accounting will require a budget check before dispatching. The Purchase Order generated through the dispatch process will indicate that it is a Change Order.

Note: POs from a closed accounting period may require an Accounting Date Change in the PO Header Details.

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>Any time a PO needs to be changed after it has already been dispatched.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td>PO Dispatch process</td>
</tr>
<tr>
<td>Assumptions</td>
<td>This document assumes that the user performing the change has the proper roles, permission lists, and user preferences to execute PO Change Orders.</td>
</tr>
<tr>
<td>Responsible Parties</td>
<td>Typically Change Orders are executed by Campus Buyers.</td>
</tr>
<tr>
<td>Alternate Scenarios</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Process Detail

I. Change Order at PO Header

The below exercise illustrates PO Header Changes to Buyer and PO Reference.

*Navigation: Purchasing > Purchase Orders > Add/Update Express POs*

```
1. Select tab.
2. Enter Business Unit: ‘UW***’
3. Enter PO ID.
4. Click Search
```
5. Click the △ icon in the upper right corner of the PO Page and the Buyer and PO Reference fields will become editable.

6. Change the Buyer and PO Reference fields.

7. Click Save. After save the PO Status reverts to ‘Approved’, ‘Open’, or ‘Pending Approval’ based on the Buyer setup and Workflow configuration. The Budget Status will stay ‘Valid’ as no financial information was changed. Next the PO needs to be dispatched. This can be done online or in batch. For online or batch PO Dispatch instructions reference the PO.1.01 Purchase Order Creation business process document.
II. Change Order at PO Line

*Navigation: Purchasing > Purchase Orders > Add/Update Express POs*

1. Select **Find an Existing Value** tab.
2. Enter *Business Unit:* ‘UW***’
3. Enter *PO ID.*
4. Click **Search**
5. **Click** on the **Line Details** icon.

### Details for Line 1

<table>
<thead>
<tr>
<th>PO ID</th>
<th>Vendor</th>
<th>Description</th>
<th>Line Status</th>
<th>Backorder Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>X566342</td>
<td>SURVEYSCIE-001</td>
<td>Survey Services per scope of work (attached). Participation of 13 four year schools and colleges/Extension</td>
<td>Approved</td>
<td>Not Backordered</td>
</tr>
</tbody>
</table>

**Amount Summary**

- Merchandise Amount: 24,999.00 USD
- Doc. Base Amt: 24,999.00 USD

**Transaction Item Description**

Survey Services per scope of work (attached). Participation of 13 four year schools and colleges/Extension in 2012 Multi Institutional Study of Leadership. Includes Survey Administration, data collection, data processing, and reporting.

6. **Click** the △ icon to initiate the PO Line change.
7. Change PO quantity.

8. Click **Save**. After save the PO Status reverts to ‘Approved’, ‘Open’, or ‘Pending Approval’ based on the Buyer setup and Workflow configuration. The Budget Status will revert to ‘Not Chk’d’ and Total Amount changes. Note: That after **Save**, the Description and UOM (Unit of Measure) fields are grayed out. The PO can be Budget Checked and Dispatched in batch or can be manually Budget Checked and Dispatched. For information about Budget Check and Dispatch see the PO.1.01 Purchase Order Creation business process document.

III. Change Order for PO Schedule

*Navigation: Purchasing > Purchase Orders > Add/Update Express POs*
1. Select tab.
2. Enter Business Unit: ‘UW***’
3. Enter PO ID.
4. Click Search
5. Click on the **Schedule Details** icon.

6. Click on the △ icon.
Here you can change schedule details. **Note**: By expanding the schedule grid you can also update the distribution details. In this example we will update PO Qty and Price.

7. **Change** PO Qty (Quantity)
8. **Change** Price.
9. **Click** ![Save](image)

**Note**: You will get this message if the line values do not equal the schedule.

10. **Click** Yes to set the Line Qty equal to the scheduled quantities. The **PO Status** will revert to ‘Approved’, ‘Open’, or ‘Pending Approval’ based on the Buyer setup and Workflow configuration. The **Budget Status** will change to ‘Not Chk’d’ because the change had a financial impact. Budget Check and Dispatch the PO online or in batch. For information regarding Budget Check and PO Dispatch see the **PO.1.01 Purchase Order Creation** business process document.

Example: Copy of the Dispatched PO after a change order:
## UW System Administration

**PURCHASING**  
780 REGENT STREET  
SUITE 145  
MADISON, WI 53715

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**Vendor:**  
0000007356  
MYWISCONSINEYE  
122 WEST WASHINGTON AVE SUITE 200  
MADISON, WI 53703

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**State of Wisconsin Purchase Order**  
**CHANGE ORDER**

*Show purchase order number on all correspondence.*

- **Date:** 04/04/2012  
- **Page:** 1  
- **Revision:** 1  
- **Purchase Order Number:** X286423

**Payment Terms:**  
- Freight Terms: Ship Via  
- NET 10  
- Destination: BESTWAY

**Buyer:**  
VIKEN, MELISSA

**Contract/Bid File:**

**Ship To:**  
PO# X286423  
University of Wisconsin System Suite 255  
780 Regent St  
Madison, WI 53715

**Bill To:**  
accounts payable list@uwex.edu  
UW System Accounts Payable  
780 Regent Suite 255  
Madison, WI 53715

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<table>
<thead>
<tr>
<th>Line-Seq</th>
<th>Item</th>
<th>Quantity</th>
<th>UOM</th>
<th>PO Price</th>
<th>Extended Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 1</td>
<td>12 Month Single subscription to MyWisconsinEye</td>
<td>2</td>
<td>EA</td>
<td>1,500.00</td>
<td>3,000.00</td>
</tr>
</tbody>
</table>

**Total PO Amount:** 3,000.00

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*No Saturday, Sunday, or holiday deliveries. Acknowledge this order promptly. Accompany each delivery with a shipping ticket or memo showing purchase order number and materials furnished.*

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**TAX EXEMPTIONS**

We are a State of Wisconsin agency, and as such, exempt from all federal, state, and local taxes. Federal Registration No. 39-73-1011-E. State No. ES-40706

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*Copy 1*
IV. Review Change History

*Navigation: Purchasing > Purchase Orders > Add/Update POs*

1. **Select** tab.
2. **Enter** *Business Unit:* ‘UW***’
3. **Enter** *PO ID.*
4. **Click** Search
5. **Select** ‘Go to: ‘06-Change History’.

6. A new browser window/tab should open, **select** from the different tabs to review changes made to the PO at the corresponding level.
## Revision History

<table>
<thead>
<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
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</thead>
<tbody>
<tr>
<td>Martha Mendoza</td>
<td>1.0</td>
<td>12/21/2012</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>Spencer Kelsay</td>
<td>2.0</td>
<td>3/25/2013</td>
<td>Updated Screenshots and Content</td>
</tr>
<tr>
<td>Spencer Kelsay</td>
<td>2.1</td>
<td>5/28/2013</td>
<td>Added Review Change History section</td>
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<tr>
<td>Mark Flemington</td>
<td>3.0</td>
<td>6/10/2013</td>
<td>Final 9.1 Updates</td>
</tr>
<tr>
<td>Susan Kincanon</td>
<td>3.1</td>
<td>06/1/2013</td>
<td>Final review, formatting, and publish to website</td>
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