

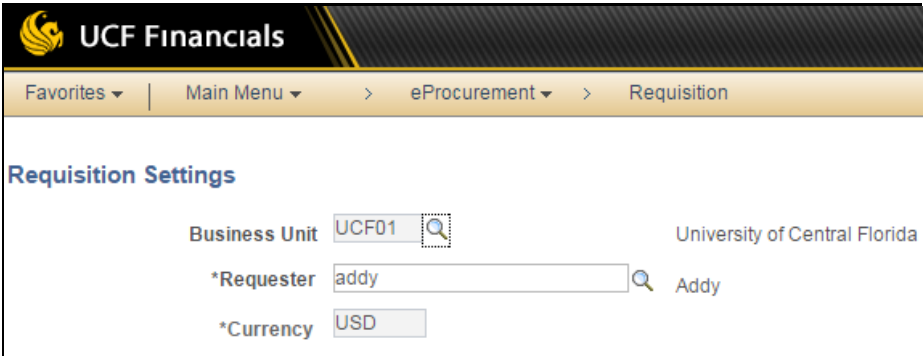
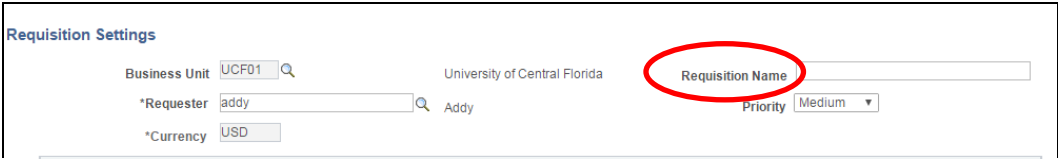


ADDY NOTES



Change Order to a Purchase Order

This Addy Note describes how to add money to a line on an existing purchase order (PO), also known as a change order to a PO. To make a change order to a PO, you'll need to create a new requisition that references the PO, so have your PO number handy.

Step	Action
<p>1.</p>	<p>Navigate to Main Menu > eProcurement > Requisition.</p> 
<p>2.</p>	<p>Enter the requisition name in the Requisition Name field using the following convention – <i>Change Order to PO [enter PO number]</i>.</p> 



ADDY NOTES

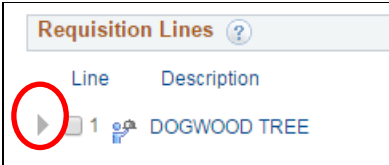
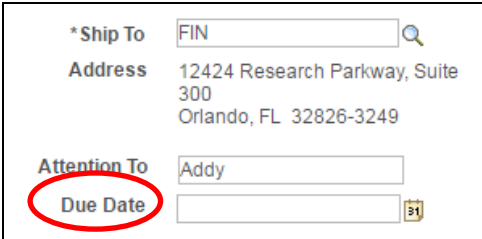
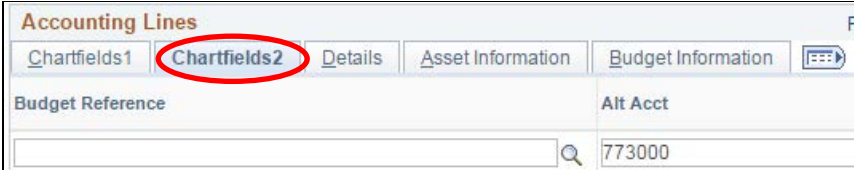


Step	Action												
3.	<p>Complete the Requisition Settings page and Create Requisition page as you typically would. In the Description field on line 1 on the Create Requisition page, enter CO to POxxxxx (enter PO number).</p> <div data-bbox="311 661 1347 928" style="border: 1px solid black; padding: 5px;"> <p>Express Item Entry ?</p> <p>Line Personalize Find View All First 1 of 1 Last</p> <p>Details Supplier Information</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Quantity</th> <th>UOM</th> <th>Category</th> <th>Price</th> <th>Merchandise Amount</th> </tr> </thead> <tbody> <tr> <td>CO to POxxxxx</td> <td>1</td> <td>EA</td> <td>11111500</td> <td>1000.00</td> <td></td> </tr> </tbody> </table> <p>Add to Cart</p> </div> <p>Note: If there are multiple lines of a PO needing a change order, you only need to do one requisition for all the lines. One requisition can capture all change orders for a single PO.</p>	Description	Quantity	UOM	Category	Price	Merchandise Amount	CO to POxxxxx	1	EA	11111500	1000.00	
Description	Quantity	UOM	Category	Price	Merchandise Amount								
CO to POxxxxx	1	EA	11111500	1000.00									
4.	<p>Click Checkout to be taken to the Review and Submit page.</p> <div data-bbox="311 1207 906 1516" style="border: 1px solid black; padding: 5px;"> <p>UCF Financials</p> <p>Favorites Main Menu > eProcurement ></p> <p>Checkout - Review and Submit</p> <p>Review the item information and submit the req for approval.</p> <p>Requisition Summary</p> </div>												



ADDY NOTES

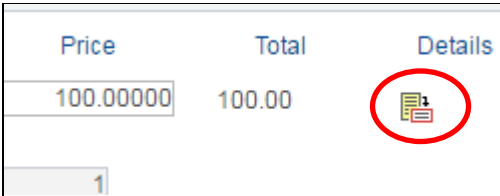
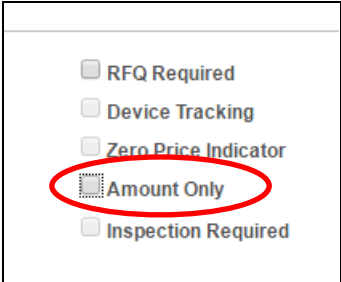


Step	Action
5.	<p>Click the line's Expand Section icon.</p>  <p>Note: Follow the remaining steps for each line of the requisition.</p>
6.	<p>Enter the Due Date.</p> 
7.	<p>Verify the SpeedChart information on the Chartfields2 tab and make changes if necessary.</p>  <p>Note: If you need to edit the Quantity field, which defaults to 1.0000, you must deselect the Amount Only check box on the Line Details screen of each line that needs to be changed. See steps 8-9 for details.</p>



ADDY NOTES



Step	Action
8.	<p>If you need to change the quantity or if the original requisition required an inspection, click the Line Details icon on the requisition line that is being changed.</p> 
9.	<p>Deselect the Amount Only check box.</p>  <p>Click OK.</p> <p>Note: You will now be able to change the Quantity field on page 3. Review and Submit. After you have entered the correct Quantity, click the Tab key on your keyboard to update the Total and the Requisition Summary. The Total reflects the Price multiplied by the Quantity.</p>



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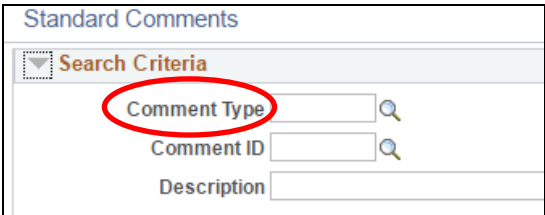
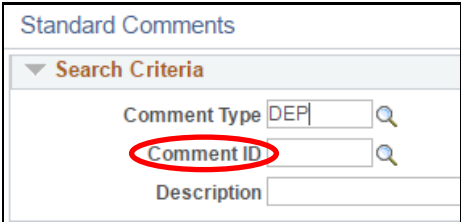


Step	Action
10.	<p>If you checked the Inspection Required check box on the original requisition, you will need to do so again on the change order.</p> <ol style="list-style-type: none"> 1. Return to the Line Details page as in step 8. 2. Select the Inspection Required check box. 3. Click OK. <div data-bbox="313 793 602 1052" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <input type="checkbox"/> RFQ Required <input type="checkbox"/> Device Tracking <input type="checkbox"/> Zero Price Indicator <input type="checkbox"/> Amount Only <input checked="" type="checkbox"/> Inspection Required </div> <p>Note: You cannot deselect Amount Only and select Inspection Required in the same step. You must leave the Line Details page after deselecting Amount Only and return to select Inspection Required.</p>
11.	<p>Click in the Requisition Comments and Attachments section, click Add more Comments and Attachments.</p> <div data-bbox="313 1350 972 1564" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <div style="text-align: right; margin-top: 5px;"> </div> <div style="text-align: center; margin-top: 10px;"> Add more Comments and Attachments </div> </div>



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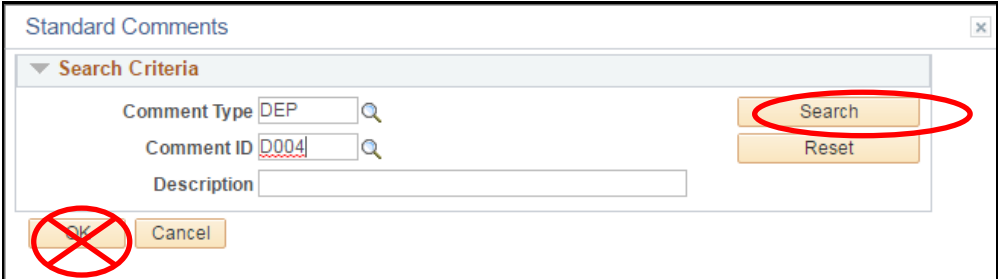
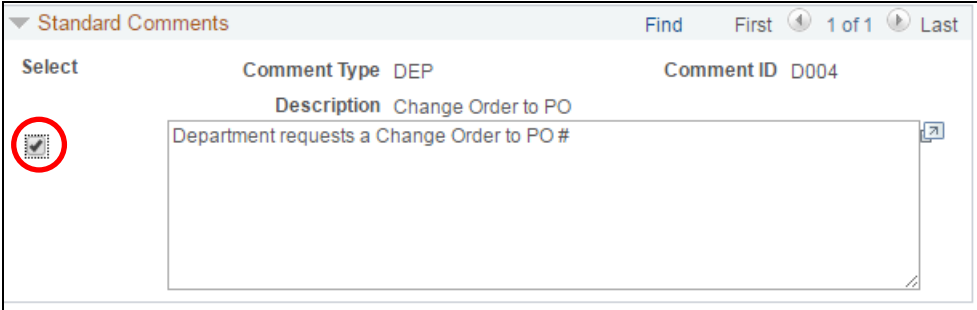
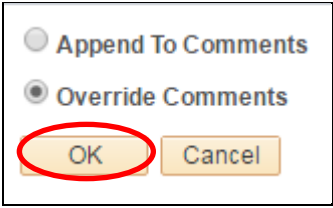


Step	Action
12.	<p>Click Use Standard Comments to enter the “Change Order to PO” predefined, standard comment.</p> 
13.	<p>Enter DEP in the Comment Type field.</p> 
14.	<p>Enter D004 in the Comment ID field.</p> 



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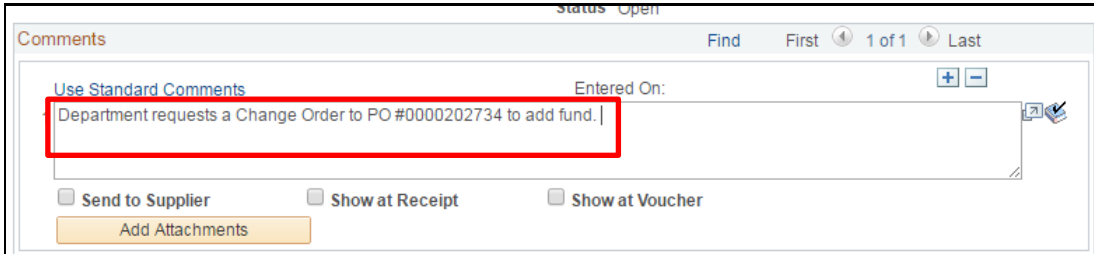
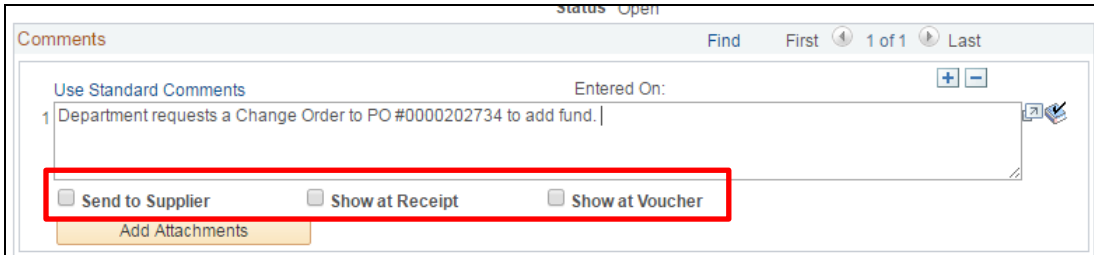
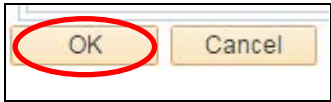
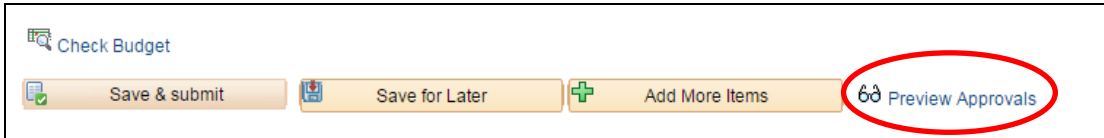


Step	Action
15.	<p>Click Search. Do not click OK.</p>  <p>Note: You do not need to add a description in the Description field.</p>
16.	<p>Select the comment.</p> 
17.	<p>Click OK.</p> 



ADDY NOTES



Step	Action
18.	Edit the comment to reflect your change. 
19.	Select the boxes that you selected on the original PO. 
20.	Click OK . 
21.	Click Preview Approvals . 
22.	Budget Check and Submit your requisition.