20/30 Webinar Series: #12
Other Common Change Order Errors and How To Resolve Them
Agenda

1. About this Session
2. Change Order Errors
   • Cancelling partially/full vouchered PO Lines
   • Mixing forms on a PO.
   • Zero dollar PO lines
3. Resources & Support
4. Question and Answer
About this Session

- Change Order Preparers
- 30 Minutes
- Change Order Errors
- Question and Answer
20/30 Webinar Series

Common Change Order Errors
Cancelling Partially/Fully Vouchered PO Lines

When a PO line has been partially or fully vouchered, the PO line cannot be cancelled. Systematically, the funding source cannot be cancelled when it has already been (partially) paid.

**Action department wishes to take:**
- Release encumbrance against a PO line that is no longer needed.

**How the CO needs to be approached:**
- First check to see if the PO line has been vouchered. If so:
  1. Reduce the line amount and/or quantity to match what was invoiced and paid.

**What departments actually do:**
- Department change order preparers often assume the PO line amount visible in BearBuy is the PO line balance.
- They select the PO line and from Available Actions click ‘cancel line’.

**What to do to fix the error:**
1. Select the cancelled PO line and from Available Actions select ‘uncancel’.
LIVE DEMO
Mixing Forms on a PO

When a Form type (quantity or amount) is added to a PO who’s form type is the opposite.

**Action department wishes to take:**
- Add a new line to a PO.

**How the CO needs to be approached:**
- Add same form type to PO:
  1. Open up the existing form on the PO.
  2. Update the form quantity or/and amount to the new line amount. Update other fields if needed.
  3. From the Available Actions drop-down menu, select add to Po revision.
  4. From the new window, enter the PO #, click go.
  5. Select the radio button to the right side of the search results.
  6. Click close.

**What departments actually do:**
- Navigate to any other form and add it to the PO.

**What to do to fix the error:**
1. Contact the BearBuy help desk. PO become corrupt and can no longer be updated through BearBuy. It must be manually updated by a BearBuy Analyst.
LIVE DEMO
Zero Dollar Lines on a PO

When one or more PO line amount is equal

**Action department wishes to take:**
- Release encumbrance against a PO line that is no longer needed.

**How the CO needs to be approached:**
- First check to see if the PO line has been vouchered. If so:
  1. Reduce the line amount and/or quantity to match what was invoiced and paid.

**What departments actually do:**
- Department change order preparers often assume the PO line amount visible in BearBuy is the PO line balance. They update the PO line to = $0.

**What to do to fix the error:**
1. Update the PO line amount/quantity to match what has been vouchered and paid against it.
LIVE DEMO
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RESOURCES & SUPPORT
Resources & Support

- The BearBuy website is the source for the most up-to-date news, announcements and training resources
  - supplychain.berkeley.edu/bearbuy

- BearBuy YouTube Channel - Short demos videos!
  - youtube.com/user/BearBuyProcurement
  - Subscribe to receive notifications when new videos are posted.

- BearBuy Help Desk #1 place to stop for help:
  - (510) 664-9000 Option 1, Option 2
  - Mon-Fri 8 AM to 5PM
  - Email BearBuy Help (bearbuyhelp@berkeley.edu)
Questions?

Please send all related question to bearbuyhelp@berkeley.edu