

Updating a COA Field on a Non-Vouchered PO

Concepts

- ➤ Individuals with the *Change Order Preparer* or *Buyer* Role can perform PO changes in BearBuy.
- When a PO is changed you are required to provide backup to support the reason for the change via comments/attachments.
- ➤ Before making a PO change, *Change Order Preparers* should check to see if there are vouchers posted against the PO to determine the appropriate path to take.
- When updating a chartstring field, the PO revision should **not** be sent to the supplier.
- Do not uncheck the Resend to PO Export in the Finalize Revision window. The PO Export Box must be checked so the PO change is exported to BFS and the systems stay in sync.

If you've identified that a PO has no vouchers/invoices posted against it you can update the COA regardless of PO type (Catalog or Form).

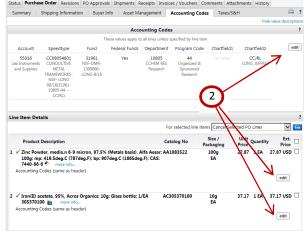
Step 1: Identify how much has been partially vouchered against PO

 In the PO, navigate to the Invoices/Vouchers tab. If there are no vouchers for this PO proceed with your COA changes.



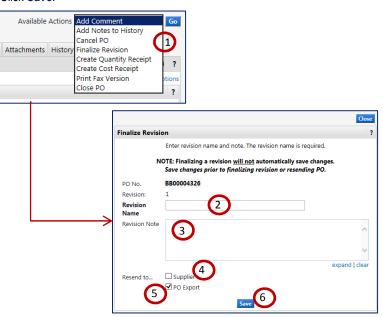
Step 2: Update the COAs

- 1. In the PO, navigate to the Purchase Order>Accounting Codes sub-tab.
- 2. Select **edit** next to the COA combination at the header or the individual line level. Replace the COA field that needs to be updated. Once complete, click **Save**.



Step 3: FINALIZE REVISIONS

- 1. Go to Available Actions and select Finalize Revision and click Go.
- 2. In the **Finalize Revision** pop-up window, enter a **Revision Name** (i.e. updating...).
- Enter comments related to this revision in the Revision Note text box.
- 4. Unselect **☑** Resend to supplier.
- 5. Leave **☑ PO Export** selected.
- 6. Click Save.



NOTE: If you encounter any issues when updating a COA value, contact bearbuyhelp@berkeley.edu.

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