

## Concepts

- Individuals with the *Change Order Preparer* or *Buyer* Role can perform PO changes.
- Backup supporting the PO change must be attached 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 steps to take.
- When updating a COA 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.

You cannot change the COA combination on the partially invoiced/vouchered quantity. You will have to add a new line to the PO for the remaining quantity.

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

1. In the PO, navigate to the **Invoices/Vouchers** tab. The quantity eligible to move to a new line and update is the **Open** quantity. The **Net invoiced** is the quantity already vouchered.

Line No.	Product Name	Catalog No.	Unit Price	Qty / UOM Ordered	Extended Price	Voucher Qty / Cost	Status
1	Water Hard Drill Rod Steel Material Fractional Size 18 In Decimal Equivalent 01250 In Dia Tolerance 0005 In Finish 15 RMS Max Length 36 In Length Tolerance 125 In000 In Hardness Scale 275 BHN Max Grade W1 Standards UNS T72301	33352	1.66 USD	20 EA	33.20 USD	13 / 21.58 USD 7 / 11.62 USD	Open Net Invoiced

### Step 2: Add a new line on the PO

1. In the PO, navigate to the **Purchase Order>Summary** sub-tab.
2. Scroll to the bottom of the page and locate the **Line Item Details**.
3. Select the **check box** to the right of the PO line.

Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price	Ext. Price
1 ✓ Water Hard Drill Rod Steel Material Fractional Size 18 In 33352		EA	1.66	20 EA	33.20 USD	<input type="checkbox"/> edit

4. Within **For selected line items**, select **Add to PO revision** then click **Go**.

For selected line items	Cancel Selected PO Lines	Go
No	Size / Packaging	
2	Add to PO Revision	edit

5. In the new window, enter the PO number that you are performing the change order on and select **GO**.

6. Select the **Action** radio button and click **Add to PO** (only once).

7. Click on the **Close** button. Refresh your window; the new line should now be displayed.

PO No.	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total	Action
BB00424597	GRAINGER INC	9/8/2014 12:14 PM	53983112	MIKE COURTER	Sent/Confirmed Backordered	Partially Invoiced Partially Matched	33.20 USD	<input type="radio"/> Add to PO

### Step 3: Update line quantities

1. In the PO, navigate to the **Purchase Order>Summary** sub-tab.
2. Scroll to the bottom of the page, and select **edit** next to the original line.
3. In the pop-up window, update the **quantity** on the line so the quantity is the **Net Invoiced** PO quantity. Click **Save**.
4. Scroll to the bottom of the page, and select **edit** next to the new line.
5. In the pop-up window, update the **quantity** to the **Open** PO quantity. Click **Save**.

Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price	Ext. Price
1 ✓ Zebra Pen - Z-Grip Retractable Ballpoint Pens, Ink Color Assorted, Point Size Medium, Quantity/Unit 24/Pack	N112224	PK	5.94	5 PK	29.70 USD	<input type="checkbox"/> edit

  

Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price	Ext. Price
1 ✓ Zebra Pen - Z-Grip Retractable Ballpoint Pens, Ink Color Assorted, Point Size Medium, Quantity/Unit 24/Pack	N112224	PK	5.94	7	41.58 USD	<input type="checkbox"/> edit

### Step 4: Update the COAs

1. In the PO, navigate to the **Purchase Order>Accounting Codes** sub-tab.
2. Select **edit** next to the chartstring combination at the header level. Replace the chartstring field that needs to be updated. Click **Save**.
3. Update the COA combination on the original line. Navigate to the old line and select **edit** to the right of the line.
4. Enter the original chartstring combination. Click **Save**.

The top screenshot shows the 'Accounting Codes' section of a purchase order. It includes a table with columns: Account, Speedtype, Fund, Federal Funds, Department, Program Code, Chartfield1, and Chartfield2. A circled '2' is next to the 'edit' button in the top right corner of this section.

The bottom screenshot shows the 'Line Item Details' section. It displays two line items for 'Zebra Pen - Z-Grip Retractable Ballpoint Pens, Ink Color Assorted, Point Size Medium, Quantity/Unit 24/Pack'. A circled '3' is next to the 'edit' button for the first line item.

This screenshot shows the 'Available Actions' dropdown menu. The 'Finalize Revision' option is circled with a red '1', indicating the first step in the process.

This screenshot shows the 'Finalize Revision' pop-up window. It contains a text input field for 'Revision Name' (circled 2), a text area for 'Revision Note' (circled 3), and two checkboxes: 'Resend to...' (circled 4) and 'PO Export' (circled 5). A 'Save' button is circled as step 6.

**NOTE:** If you encounter any issues when updating a COA value, contact [bearbuyhelp@berkeley.edu](mailto:bearbuyhelp@berkeley.edu).

## Step 6: 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...).
3. 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**.