

## 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 amount. You will have to add a new line to the PO for the remaining amount.

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

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

Voucher No.	Supplier Invoice Number	Invoice Date	Due Date	Voucher Type	Payment Status	Voucher Total	Vouchered By
SQ649666	INV715221B	8/17/2014	9/16/2014	Voucher	Payable	1,268.45 USD	DUNN, Erecka Q.
SQ649668	INV715219B	8/17/2014	9/16/2014	Voucher	Payable	1,317.60 USD	DUNN, Erecka Q.
SQ650092	INV715206B	8/10/2014	9/9/2014	Voucher	Payable	222.75 USD	Chapman, Brian
SQ650215	INV715253B	8/24/2014	9/23/2014	Voucher	Payable	836.57 USD	Rufus, LaShawnta
SQ650221	INV152522B	8/24/2014	9/23/2014	Voucher	Payable	415.80 USD	Rufus, LaShawnta

  

Line No.	Product Name	Catalog No.	Unit Price	Qty / UOM Ordered	Extended Price	Voucher Qty / Cost	Status
1	Athletic Catering		25,000.00 USD	1	25,000.00 USD	n/a / 17,135.97 USD n/a / 7,864.03 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.

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

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 **Close** and refresh your PO window; the new line should now be displayed.

### Step 3: Update line amounts/quantities

1. In the PO, navigate to the **Purchase Order>Summary** sub-tab.
2. Scroll to the bottom of the page, and select the original **form** line; the form should open in a separate window.
3. Update the **quantity and/or amount** on the form so the line total is the **Net Invoiced** PO amount.
4. Scroll to the top of the form, ensure that **Save** is selected in the **available actions** drop-down, click **GO** and **Close** the form.
5. Scroll to the bottom of the page, and select the new **form** line; the form should open in a separate window.
6. Update the quantity and/or amount on the form so the line total is the **Open** PO amount.
7. Scroll to the top, ensure that **Save** is selected in the **available actions** drop-down, click **GO** and **Close** the form.

### Step 4: Update the COAs

1. In the PO, navigate to the **Purchase Order>Accounting Codes** sub-tab.
2. Select the **edit** button 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**.

Status: Purchase Order | Revisions | PO Approvals | Shipments | Receipts | Invoices / Vouchers | Comments (1) | Attachments | History

Summary | Shipping Information | Buyer Info | Asset Management | **Accounting Codes** | Hide value descriptions

**Accounting Codes**

These values apply to all lines unless specified by line item

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	edit
55040 General Supplies	PH05400PIL Example - Physics Instructional Labs (19900-13054-40- PH9030-)	19900 GENERAL FUNDS	No	13054 PHYSI PIL	40 Instruction & Dept Research	PH9030 Physi-Lower Div Instruct Labs	no value	<b>2</b>

**Line Item Details**

For selected line items: Cancel Selected PO Lines

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	checkbox
1 ✓ Service Order Request	SERVICE/AMOUNT-ONLY		7,000.00	1	7,000.00 USD	<b>3</b>
2 ✓ Service Order Request	SERVICE/AMOUNT-ONLY		1,500.00	1	1,500.00 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. **Total: 8,500.00 USD**

Status: Purchase Order | Revisions | PO Approvals | Shipments | Receipts | Invoices / Vouchers | Comments (1) | Attachments | History

Summary | Shipping Information | Buyer Info | Asset Management | **Accounting Codes** | Hide value descriptions

**Accounting Codes**

These values apply to all lines unless specified by line item

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	edit
55040 General Supplies	none none	19900 GENERAL FUNDS	No	13054 PHYSI PIL	40 Instruction & Dept Research	no value	no value	

Accounting Codes values vary by line

**Line Item Details**

For selected line items: Cancel Selected PO Lines

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	checkbox
1 ✓ Service Order Request	SERVICE/AMOUNT-ONLY		7,000.00	1	7,000.00 USD	
2 ✓ Service Order Request	SERVICE/AMOUNT-ONLY		1,500.00	1	1,500.00 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. **Total: 8,500.00 USD**

5. Leave  PO Export selected.
6. Click **Save**.

Available Actions

- Add Comment** **Go**
- Add Notes to History
- Cancel PO
- Finalize Revision **1**
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version
- Close PO

**Finalize Revision**

Enter revision name and note. The revision name is required.

**NOTE: Finalizing a revision will not automatically save changes. Save changes prior to finalizing revision or resending PO.**

PO No. **BB00004326**

Revision: 1

Revision Name **2**

Revision Note **3**

Resend to...  Supplier **4**

PO Export **5**

**Save** **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**.