



# BearBuy User Training: Change Order Preparer



BearBuy User Training

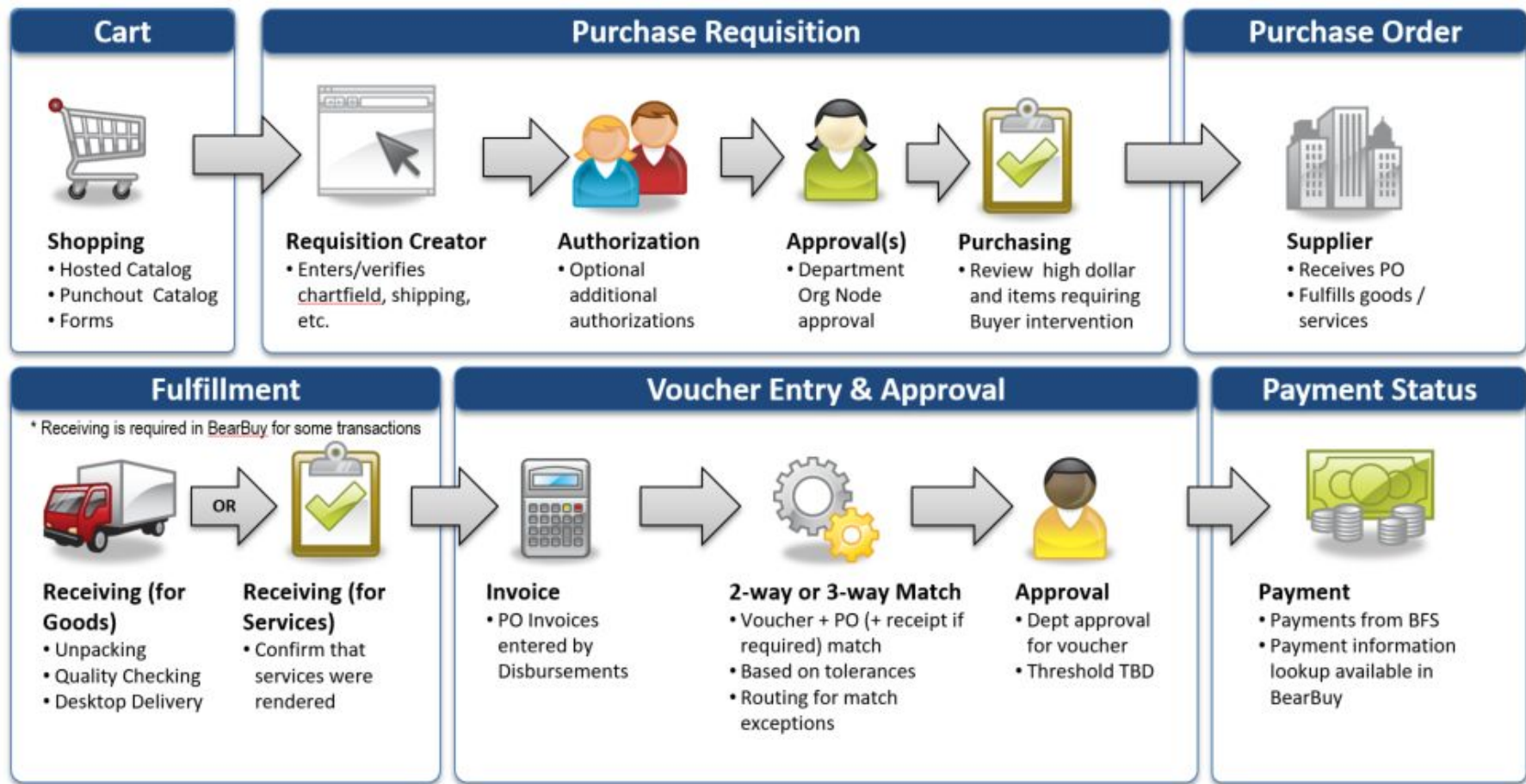
# INTRODUCTION



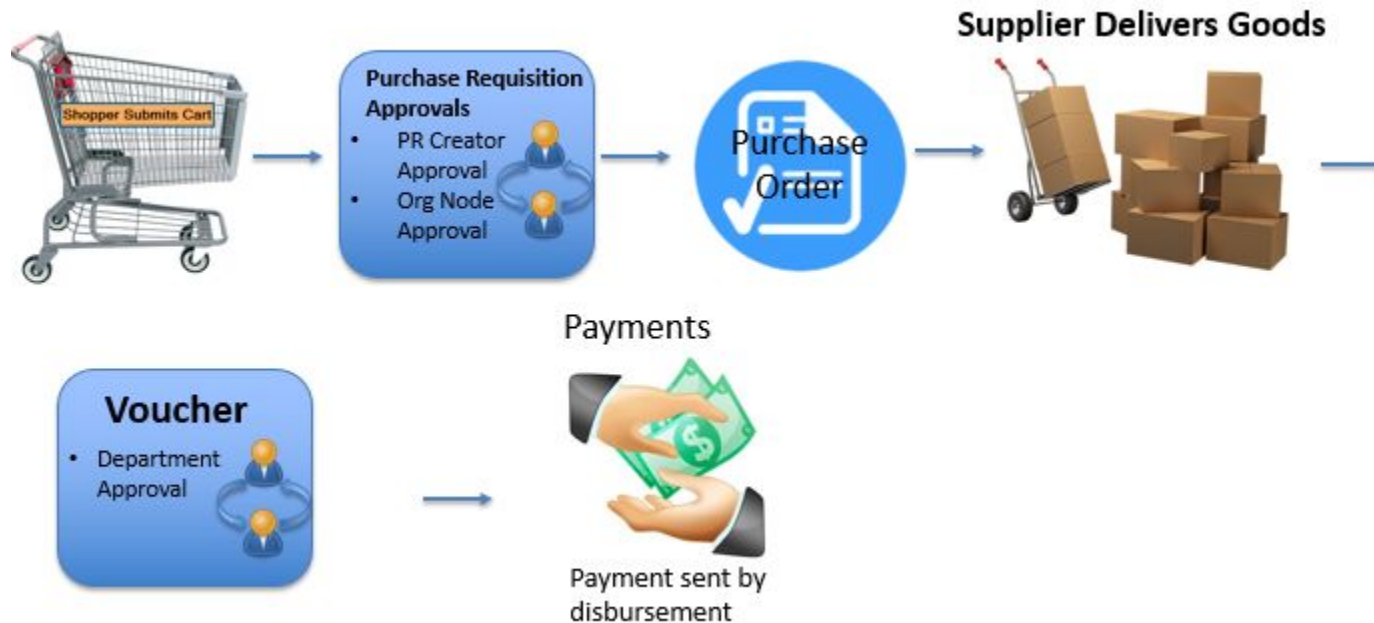
BearBuy User Training

# **CONCEPTS & PROCESS OVERVIEW**

# BearBuy Workflow



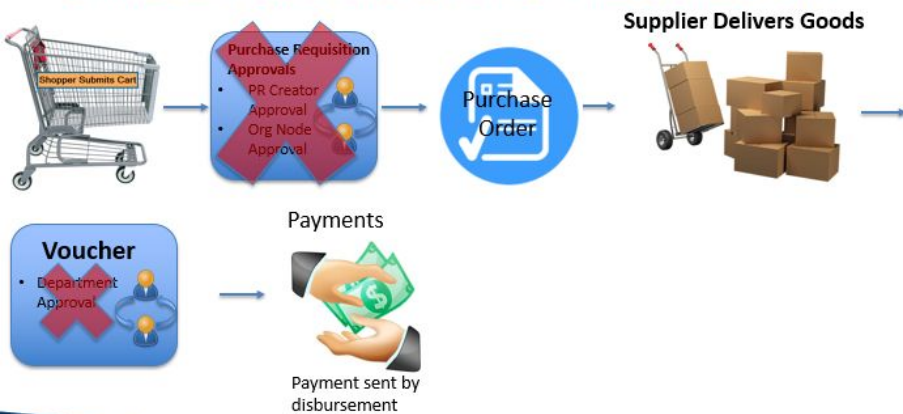
# Past Workflow



# Present Workflow

## 2 Way Match

Contracted Orders < 5K and Non-Contracted Orders < 1K



## 3 Way Match

Contracted Orders > 5K and Non-Contracted Orders > 1K



# Overview

- A change order is any modification to a purchase **order**
- Change orders **do not** clear Match Exceptions.
  - Match Exceptions will be resolved in BearBuy and approved by the departments.
- User must have the role of Change Order Preparer to change a Purchase Order.
- If the requisition was modified previously by a buyer then that buyer is responsible for future change orders
  - If a change will increase the dollar amount to a buyer's threshold then the change order should be handled by the buyer

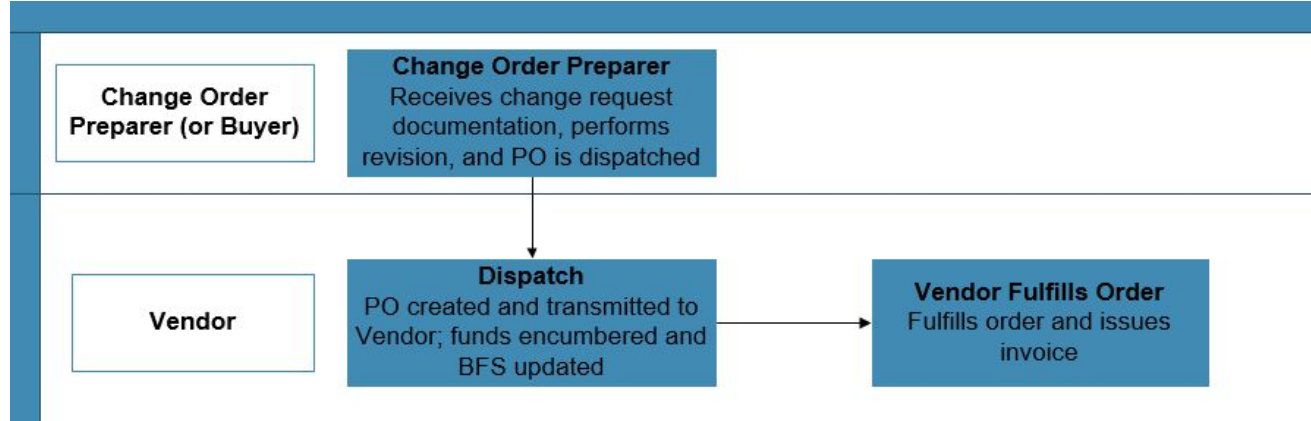
## Changes to a PO include:

• Modify Chartfields	• Add a line to a PO
• Any Change to Qty or Amount	• Cancel a Line ( <i>unvouchered</i> )
• Extend Services PO End Date	• Cancel a PO ( <i>unvouchered</i> )
• Any Change to the Statement of Work deliverables or quantities	• Close a PO

## Change Order Documentation:

- Any needed documentation should be attached. See SCM [Required PO Documents](#) for specific document needs

# Overview



- Change orders do not have an approval workflow.
  - Once a change order is finalized it exports to BFS.
  - Changes export to BFS every half hour
- Change order preparers should determine if the PO revisions must be sent to the Supplier and select the appropriate checkbox.
  - When finalizing the revision, the user should select the “Distribute PO” box if they want the revised PO sent to the supplier
- Evidence documenting approval of the change order should be included
  - Can include via the Comments tab.
- Change order preparers must ensure changes transmit to BFS successfully (visual confirmation by checking BFS)



# Considerations

## ***Do Not Cancel a PO if:***

- ... PO is partially or fully matched
- ... PO distribution/schedule/line has an active voucher
- ... After a change order has occurred
- ... After Supplier has fulfilled the order

## ***Invalid information may appear as***

- ... Invalid Chartfields
- ... Invalid Distribution/line
- ... Merchandise Amount (\$0 lines)

NOTE: Make sure to validate Chart of Account information (COA) before performing a COA change. Use the [BFS COA Validation Lookup](#) tool.

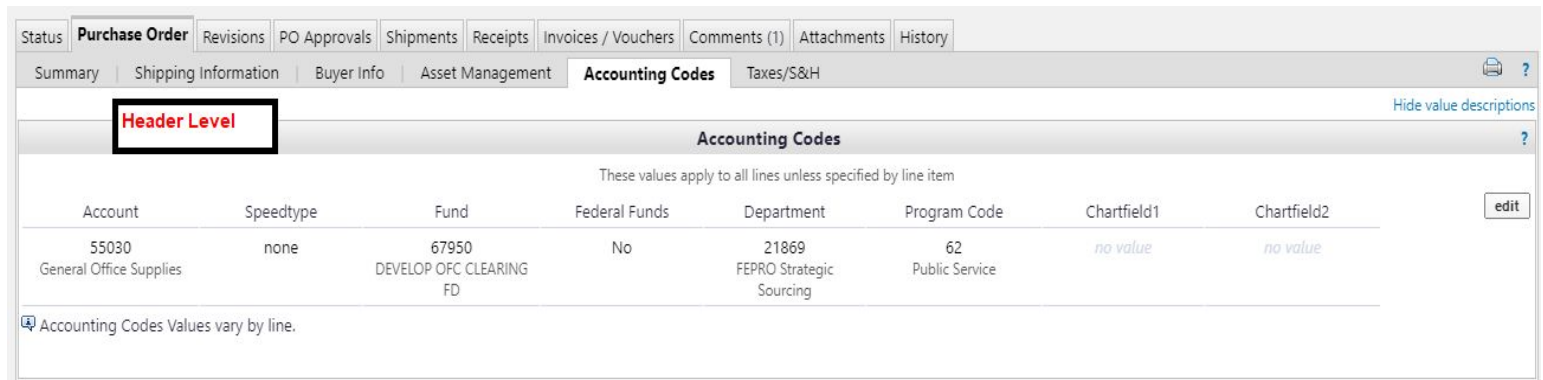
# Best Practices

## Steps to perform a PO Change

1. Make the change – update the PO
2. Decide if Vendor needs a dispatched copy
3. Add comment to the PO to explain the change
4. Critical last step: **Must Finalize** the change order to establish the new version of the PO
  - Always finalize your revision.
  - Caution: Do not finalize Change Orders back to back because it might not port through to BFS

# Common Issues And How To Avoid Them

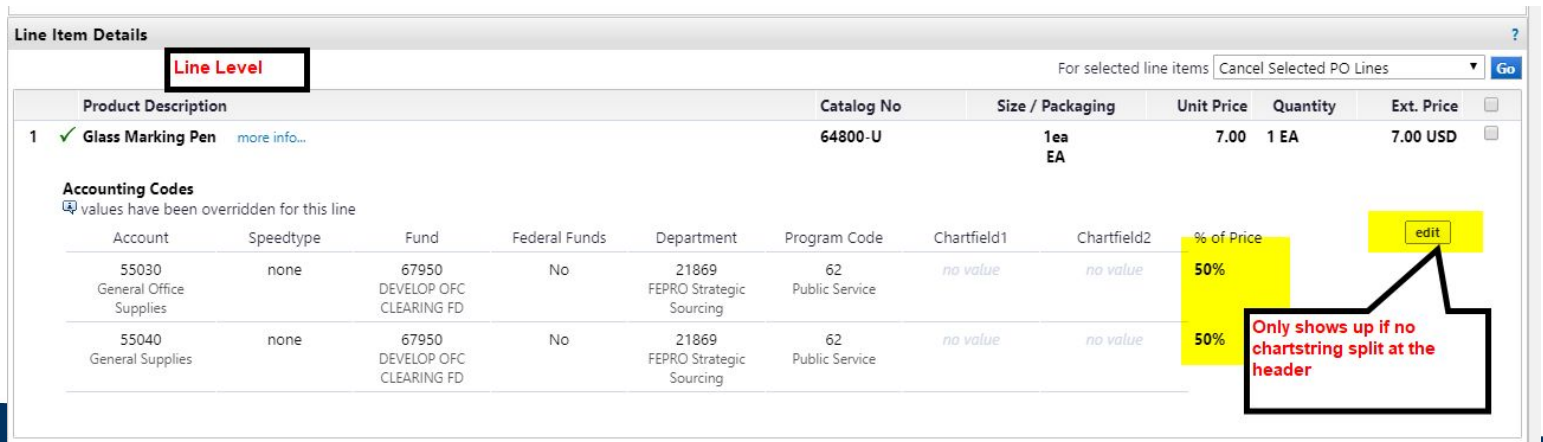
- When performing a **Split by Amount** on a PO with **multiple lines**, perform the split at the line level not at the accounting codes header.
  - Splitting by Amount at the header on a multiple line PO will result in an error
  - Header total applies to each individual line



The screenshot shows the 'Accounting Codes' header level in a procurement system. A red box highlights the 'Header Level' label. The table below shows the accounting codes for the header, which apply to all lines unless specified by line item.

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	
55030 General Office Supplies	none	67950 DEVELOP OFC CLEARING FD	No	21869 FEPRO Strategic Sourcing	62 Public Service	no value	no value	edit

Accounting Codes Values vary by line.



The screenshot shows the 'Accounting Codes' line level for a specific line item. A red box highlights the 'Line Level' label. The table below shows the accounting codes for this line, with a yellow box highlighting the '% of Price' column. A callout box points to the 'edit' button, stating: 'Only shows up if no chartstring split at the header'.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 ✓ Glass Marking Pen <a href="#">more info...</a>	64800-U	1ea EA	7.00	1 EA	7.00 USD	

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	% of Price	
55030 General Office Supplies	none	67950 DEVELOP OFC CLEARING FD	No	21869 FEPRO Strategic Sourcing	62 Public Service	no value	no value	50%	edit
55040 General Supplies	none	67950 DEVELOP OFC CLEARING FD	No	21869 FEPRO Strategic Sourcing	62 Public Service	no value	no value	50%	

# Common Issues And How To Avoid Them Cont.

- **If a PO or PO line is completely vouchered you cannot change chartstring values. To change the chartstring coding for the vouchered amount you will have to perform a financial journal entry.**
- If you are requested to close a PO, please ensure:
  - No existing associated vouchers are pending payment (in process and/or payable status)
  - PO has at least 1 paid voucher. No vouchers = payment pending.
- Research and resolve any PO errors from bfs1@berkeley.edu
  - If assistance is needed, please email [bearbuyhelp@berkeley.edu](mailto:bearbuyhelp@berkeley.edu) to create a ticket.
  - Email subject line: Sciquest PO Validation Error (BFSPROD)
  - Vouchers will not pay if your PO revision does not export to BFS successfully
- Link to Change Order Preparer Document:

[https://supplychain.berkeley.edu/sites/default/files/module6-change\\_order\\_and\\_match\\_exception\\_v7.doc](https://supplychain.berkeley.edu/sites/default/files/module6-change_order_and_match_exception_v7.doc)

# Change Order - Reminders

## Line Item Cancellation

- **Line item does not export until PO revision is finalized in BearBuy**
  - Can not be un-canceled

## Change Order Requests

- Orders  $\leq$ \$9,999.99 and/or doesn't contain a Buyer's name
  - Enter a comment in the PO addressed to your **Regional Group contact** in the "add email recipient" link
- Orders  $\geq$ \$10,000.00 PO's or that list a Buyer's name
  - Enter a comment in the existing PO addressed to your department's assigned Buyer
- Regional Buyer Contact can be found at: <https://supplychain.berkeley.edu/procurement/contact-your-buyer>
- Regional Website Contact information:
  - <https://portal.berkeley.edu/regions>
  - <https://bearsregion.berkeley.edu/regional-services/purchasing-and-reimbursements>
  - <https://champs.berkeley.edu/regional-services/purchasing-and-reimbursements>
  - <https://shareregion.berkeley.edu/regional-services/purchasing-and-reimbursements>
  - <https://pros.berkeley.edu/regional-services/purchasing-and-reimbursements>
  - <https://bioregion.berkeley.edu/regional-services/purchasing-and-reimbursements>
  - <http://www.erso.berkeley.edu/erso/content/purchasing>

# Change Order – Common Mistakes

It is important that change orders are done correctly. If incorrect, an export error is sent from [bfs1@berkeley.edu](mailto:bfs1@berkeley.edu) to the OWNER of the Purchase Order or the Change Order Preparer.

Bfs1@berkeley.edu email	Interpretation	Action Required by Change Order Preparer
PO Line cannot be cancelled as it has been vouchered. PO id/Line nbr/Vouchered Amt (25000,168)	Cancelling PO when PO has been partially vouchered	Uncancel PO, reduce amount/quantity on lines that no longer need to have an open balance. OR Close PO
Error changing value. {UC_PO_EXPRESS_CI.PO_LINE(1).PO_LINE_SHIP(1).PO_LINE_DISTRIB(2).BUSINESS_UNIT_GL} (91,34)	Chartstring combination invalid or PO change order with Fund (or other chartfield) effective date newer than the PO date	Update PO using a valid chartstring combination or Contact the BearBuy help desk so BearBuy Analyst can manually correct error.
The Amt-only flag has changed for PO/Line. Please do this change manually. (25000,231)	Mixed amount and quantity based forms on PO	Contact the BearBuy help desk so BearBuy Analyst can manually correct error.
Amount vouchered against this PO Line > PO Line amt. (25000,173)	PO Change order against a PO line but another PO line already was invoiced or over invoiced and forced matched.	Update the line that contains a match exception so it matches what was vouchered against it. Once completed finalize revisions.
A Distribution was changed (chartfields) but has been vouchered. PO/Line. Cannot be updated. (25000,190)	PO Change order in chartfields against PO dollar amount larger than the remaining open balance.	Update PO (by performing a chartstring split) to only move remaining balance on PO/PO line, not the whole dollar value.
Error on line. Amount on schedule, not equal to the sum of distributions. (10200,103)	Split by amount on header for a multiple line PO/Req	Update split from amount to percentage or perform update PO lines with individual chartstring combinations.
Distribution lines for PO line 2 have duplicate chartfields. (25000,232)	Duplicate chartstrings entered on split.	Correct accounting codes
PO = BB00261967 is closed in Sciquest and does not exist in PS. Bypassing. (25000,177)	PO never exported to BFS successfully. Error on Req level.	Open the PO in BearBuy and export it to BFS.
Amount vouchered against Distrib line > the PO Distrib Merch amt. (25000,174)	Split calculation performed incorrectly	Correct split calculation



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# **RESOURCES & SUPPORT**

# Resources

- The BearBuy website is the source for the most up to date news, announcements and training resources
  - [supplychain.berkeley.edu/bearbuy](https://supplychain.berkeley.edu/bearbuy).
- The Supply Change Management Procurement website is the source for the most up to date requirements
  - Required PO Documents
    - <https://supplychain.berkeley.edu/campus/procurement/required-po-documents>
  - Amendments and Change Orders
    - <https://supplychain.berkeley.edu/campus/procurement/amendments-change-orders>



# Help Desk

- BearBuy Help Desk #1 place to stop for help:
  - BearBuy information (about BearBuy)
  - Recommended best practices
  - Technical assistance
  - Policy related questions
  - Much more!
- Contact the BearBuy help desk!
  - (510) 664-9000 Option 1, Option 2
  - Mon-Fri 8 AM to 5PM
  - [Email BearBuy Help](mailto:bearbuyhelp@berkeley.edu) (bearbuyhelp@berkeley.edu)