20-30 Webinar Series:
#2 Top 3 Change Order Errors and How to Avoid them
Agenda

1. About this Session

2. Change Order Errors
   - Editing a chartstring on a partially vouchered PO.
   - Split by amount on PO header on a multi-line PO.
   - Change order when Match Exception existing on PO.

3. Resources & Support

4. Question and Answer
About this Session

• Intended for Change Order Preparers
• 30 Minutes
• Change Order Errors
• Question and Answer
Editing a chartstring on a partially vouchedered PO
Editing a chartstring on a partially vouchered PO

When a PO has been partially vouchered, entire PO chartstrings cannot be changed. Systematically, the funding source cannot change on something that has already been paid.

**Action department wishes to take:**

- New funding source changes on a PO, PO needs to be updated, PO needs to be corrected, etc.

**How the CO needs to be approached:**

- First check to see if the PO has already been partially vouchered. If partially vouchered, you can:
  1. Create a split on that line, or
  2. Reduce the line to match what was invoiced and paid, add a new line for the remaining amount and enter the updated chartstring on that line

**What departments actually do:**

- Department change order preparers often make the change without checking if the PO is partially vouchered.
- This causes PO export errors. If not corrected, will also result in voucher export errors (PO and voucher won’t match!)

**What to do to fix the error:**

1. Create a split on that line leaving original chartstring combo on the first distribution line and the new combo on the second distribution line, or
2. Reduce the line to match what was invoiced and paid, add a new line for the remaining amount and enter the updated chartstring on that line.
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SPLIT BY AMOUNT ON PO HEADER ON A MULTI-LINE PO
Split by amount on PO header on a multi-line PO

Split by amount at the header with multiple lines caused the PO export error. By splitting at the header by amount the system is interpreting that the entire header amount (exp, $10,269) applies to line 1 (which for example may only be $1,000).

Action department wishes to take:
• Split the PO total amongst different funding sources by amount when PO has more than 1 line.

How the CO needs to be approached:
• If PO has more than 1 line on it:
  1. If each line has a different funding source, edit each individual line
  2. If some of the lines have the same funding source, create a split at the header by percentage (not amount).

What departments actually do:
• Create a split by amount at the header when more than 1 line is present.

What to do to fix the error:
  1. Convert the header split by amount to split by percentage, or
  2. Remove split by amount at the header and edit each individual line to reference the unique chart string combination.
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CHANGE ORDER WHEN MATCH EXCEPTION EXISTING ON PO
Change order when Match Exception exists on PO

Since a PO line had already experienced a match exception and a change was made to the PO, the PO will fail to export into BFS. If no change were needed, no errors would have existed on PO.

**Action department wishes to take:**
- Update a PO

**How the CO needs to be approached:**
- If there is a match exception visible on the PO:
  - Increase match exception line so Line = invoiced amount
  - Perform original change desired
  - Finalize Revisions

**What departments actually do:**
- Ignore match exception and continue with their original change order

**What to do to fix the error:**
- Navigate to the line with the match exception and:
  - Increase line = invoiced amount
  - Finalize Revision
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RESOURCES & SUPPORT
Online Resources

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – [procurement.berkeley.edu/bearbuy](http://procurement.berkeley.edu/bearbuy).

• BearBuy YouTube Channel - Short demos videos!
  – [youtube.com/user/BearBuyProcurement](http://youtube.com/user/BearBuyProcurement).
  – Subscribe to receive notifications when new videos are posted.
Help Desk

• BearBuy Help Desk #1 place to stop for help:
  o BearBuy information (about BearBuy),
  o Recommended best practices,
  o Technical assistance,
  o Policy related questions, and
  o Much more!

• Contact the BearBuy help desk!
  • (510) 664-9000 Option 1, Option 2, Option 1
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)
Questions and Answers!