

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

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

PO/Reference No. **BB00425408 Revision 0** Available Actions Add Comment

Supplier **FISHER SCIENTIFIC**

Status Purchase Order Revisions PO Approvals Shipments Receipts **Invoices / Vouchers** Comments Attachments History

There are no vouchers for this PO.

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**.

Summary Shipping Information Buyer Info Asset Management **Accounting Codes** Taxes/S&H

Hide value descriptions

These values apply to all lines unless specified by line item

Account	Speedtype	Fund	Federal Funds	Department	Program Code	Chartfield1	Chartfield2	edit
55016 Lab Instruments and Supplies	CC08054601 CONDUCTIVE METAL FRAMEWORKS- NSF- LONG 08/1631961-10805-44- CC(RL)	31961	Yes	10805 C-CHEM RES Research	44 Organized & Sponsored Research	no value	CC(RL) LONG, JEFFREY	edit

Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	edit
1 ✓ Zinc Powder, media.n 6-9 micron, 97.5% (Metals basis), Alfa Aesar; AA1083522 100g; mp: 419.5deg.C (787deg.F); bp: 907deg.C (1665deg.F); CAS: 7440-66-6	AA1083522	100g EA	27.87	1 EA	27.87 USD	edit
2 ✓ Iron(III) acetate, 95%, Acros Organics; 10g; Glass bottle: 1/EA 308370100	AC305370100	10g EA	37.17	1 EA	37.17 USD	edit

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...).
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**.

Available Actions

- Add Comment
- 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**

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