


9.2 Creating a Change Order to a Purchase Order

Purpose: Use this document as a reference for creating a change order to a PO in ctcLink.

Audience: Purchasing Staff.

 You must have at least one of these local college managed security roles:

- ZD Accounts Payable Inquiry
- ZD Purchasing Inquiry
- ZZ Purchase Order Entry
- ZZ Purchasing Approval

You must also set these User Preference Definitions:

- [User Preferences: Purchase Order Entry](#)
- [Buyer Setup](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

Creating a Change Order to a PO

Navigation: NavBar > Navigator > Purchasing > Purchase Orders > Add/Update POs

1. The **Purchase Order** search page displays. Select the **Find an Existing Value** tab.
 - a. If it didn't default, enter the business unit in the **Business Unit** field.
 - b. Use the **PO Status** drop-down menu to select the **Dispatched** option.
 - c. Select **Search** to generate the list of dispatched POs
 - d. Select the PO that you wish to change.

Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Keyword Search

Add a New Value

Search Criteria

Business Unit

WA170

PO ID

begins with

Purchase Order Date

=

PO Status

=

Dispatched

Short Supplier Name

begins with

Supplier ID

begins with

Supplier Name

begins with

Buyer

begins with

Buyer Name

begins with

PO Type

=

Purchase Order Reference

begins with

Hold From Further Processing

Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer
WA170	000002777	11/15/2017	Dispatched	GBH COMMUN-001	V00000775	GBH Communications Inc	101007
WA170	000002778	11/15/2017	Dispatched	COPIERS NO-001	V00006689	COPIERS NORTHWEST INC	1010091
WA170	000002779	11/15/2017	Dispatched	FISCHERORA-001	0000045770	Craig Nathan Fischer	1010091
WA170	000002780	11/15/2017	Dispatched	GREATERPO-001	V000009863	Spokane Area Chamber of Commerce	1010091
WA170	000002781	11/16/2017	Dispatched	NWCCU-002	V000035383	NW Commission on Colleges and Universiti	1010091
WA170	000002782	11/16/2017	Dispatched	PELTJAZZ-001	0000045771	Jeremy Pelt	1010091
WA170	000002783	11/16/2017	Dispatched	CPNW-001	V000025110	Clinical Placements NW	1010052
WA170	000002784	11/16/2017	Dispatched	SPOKANE PU-001	V000002789	Spokane Public Districts SPS	1010091
WA170	000002785	11/16/2017	Dispatched	SPOKANE PU-001	0000045784	Spokane Public Districts SPS	1010091

2. The **Purchase Order** page displays. Select the **Change Order** button.

Note: The fields that trigger change order generation become available for entry.

Maintain Purchase Order

Purchase Order

Business Unit WA170

PO ID 000002777

Change Order 1

Current Change Reason

PO Status Dispatched

Budget Status Valid

Hold From Further Processing

Header

*PO Date 11/15/2017

Supplier Search

Doc Tot Status Valid

*Supplier GBH COMMUN-001

Supplier Details

Backorder Status Not Backordered

Create BackOrder

*Supplier ID V00000775

GBH Communications Inc

Receipt Status Not Recd

Dispatch Method Print

Dispatch

*Buyer 10100721

10100721

Amount Summary

Merchandise 45,759.00

Freight/Tax/Inc. 4,026.79

Total Amount 49,785.79 USD

Encumbrance Balance 0.00 USD

Calculate

PO Reference Polycorn Maintenance

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Actions

Add Items From

Catalog

Item Search

Select Lines To Display

Search for Lines

Line

Q

To

Q

Retrieve

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

BFO

Contract

Receiving

Personalize

Find

View All

First

1-4 of 4

Last

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status			
1		TS Select 1YR Media Suite Appliance 10-28-17 to 10-27-18 Part #: SVC-SITA1-MSAPP-PA SN #: EE1616308544DE	1.0000	EA	920	4,168.00000	4,168.00	Approved			
2		TS Select RP Clarity Software Service 10-28-17 to 10-27-18 Part #: SVC-SITA1-RPCLAR-14	60.0000	EA	920	658.10000	39,546.00	Approved			
3		TS Select 1YR Rack Server 630 7-27-17 to 6-23-18 Part #: SVC-SITA1-RS630-PA SN #: 66SD382	1.0000	EA	920	731.00000	731.00	Approved			
4		TS Select 1YR RPS1830 for Clarity 12-7-17 to 6-23-18 Part #: SVC-SITA1-RPS1830P SN #: EE161630647ADD	1.0000	EA	920	1,314.00000	1,314.00	Approved			

View Printable Version

Close Short All Lines

*Go to More

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Add

Update/Display

9.2 Creating a Change Order to a Purchase Order

Page 2

3. On the **Maintain Purchase Order** page update the Buyer in the **Buyer** field (if required). A message box displays. Read the message, then select **OK** to acknowledge the message.

The screenshot shows the 'Maintain Purchase Order' page. The 'Header' section contains fields for *PO Date (11/15/2017), *Supplier (GBH COMMUN-001), *Supplier ID (V000000775), and *Buyer (101007721). The PO Reference is 'Polycom Maintenance'. A message box is overlaid on the right side of the page. The message box has a title bar 'Message' and contains the following text: 'Changing Buyer will change the default values ShipTo ID to 170-CENTRL Dept ID to 10504 Location to 170-CENTRL , continue to retrofit the default values? (10200,290)' and 'Changing Buyer will change the default values. Press OK to continue retrofit all new default values to schedules and distributions. Press Cancel to retain the original ShipTo, Department ID, Location and Origin.' There are 'OK' and 'Cancel' buttons at the bottom of the message box.





















4. A second message box displays. Read the message, then select **OK** to acknowledge the message.

The screenshot shows the 'Maintain Purchase Order' page with the *Buyer field updated to 'CTC_BRAMIREZ'. A second message box is overlaid on the right side of the page. The message box has a title bar 'Message' and contains the following text: 'Not all distribution lines have been retrofitted. (10200,445)' and 'Distributions that have an active voucher, cannot be updated.' There is an 'OK' button at the bottom of the message box.

5. The updated **Purchase Order** page displays. If necessary, update the **PO Qty** and/or **Price** fields.
6. Select **Save**.

Lines ? Personalize | Find | View All | 1 of 4 | First 1-4 of 4 Last

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1		TS Select 1YR Media Suite Appliance 10-28-17 to 10-27-18 Part #: SVC-SITA1-MSAPP-PA SN #: EE1616308544DE	1.0000	EA	920	4,168.00000	4,168.00	Approved				
2		TS Select RP Clarity Software Service 10-28-17 to 10-27-18 Part #: SVC-SITA1-RPCLAR-14	60.0000	EA	920	659.10000	39,546.00	Approved				
3		TS Select 1YR Rack Server 630 7-27-17 to 6-23-18 Part #: SVC-SITA1-RS630-PA SN #: 6BSD382	1.0000	EA	920	731.00000	731.00	Approved				
4		TS Select 1YR RPS1830 for Clariti 12-7-17 to 6-23-18 Part #: SVC-SITA1-RPS1830P SN #: EE1616306A7ADD	1.0000	EA	920	1,314.00000	1,314.00	Approved				

View Printable Version Close Short All Lines *Go to ... More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

7. A message box displays. Read the message, then select **OK** to acknowledge the message.

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.


OK Cancel



8. The **Reason Code** page displays. Complete the following:
- Enter or select the reason in the **Reason Code** field for the PO change order.
 - Select the **OK** button.

Reason Code Page Help

Enter a reason code and comment for making changes that are being tracked.

Unit WA170 PO ID 0000000134

Reason Code **PRICECHG** 

Comment Vendor Price Change  

☐ Use Same Reason Code

OK Cancel Refresh

9. The **Schedules** page displays. Select the **Return to Main Page** link.

Maintain Purchase Order

Schedules









Unit WA170 Supplier GBH COMMUN-001 PO Status Open
PO ID 0000002777 PO Date 11/15/2017 Change Order 2

Return to Main Page

Lines Find | View All First 1 of 4 Last

Line	Item	TS Select 1YR Media Suite Appliance 10-28	PO Qty	1.0000 EA	Merchandise Amt	4,168.00 USD
Schedules Personalize Find View All First 1 of 1 Last						
Details Statuses Shipment Matching Receiving Freight RTV						
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	11/15/2017	170-CENTRL	1.0000	4,168.00000	4,168.00	Active

Add ShipTo Comments

 Save
  Return to Search
  Previous in List
  Next in List
  Notify
  Refresh
  Add
  Update/Display

10. View the **Change Order** number under the **PO ID** number in the top left corner of the **Maintain Purchase Order** page.

Maintain Purchase Order
Purchase Order

Business Unit WA170
PO ID 0000002777
Change Order 2
Copy From

Current Change Reason

PO Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*PO Date 11/15/2017
*Supplier GBH COMMUN-001
*Supplier ID V000000775
*Buyer CTC_BRAMIREZ
PO Reference Polycorn Maintenance

Supplier Search
Supplier Details
GBH Communications Inc
Bill Ramirez

Doc Tot Status Valid
Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Amount Summary

Header Details
PO Defaults
PO Activities
Requisitions
Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

Merchandise 45,759.00
Freight/Tax/Misc. 4,026.79
Total Amount 49,785.79 USD
Encumbrance Balance 0.00 USD
Calculate

Add Items From

Catalog
Purchasing Kit

Item Search

Select Lines To Display

Search for Lines

Line To Retrieve

Lines

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

11. Process complete.