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:

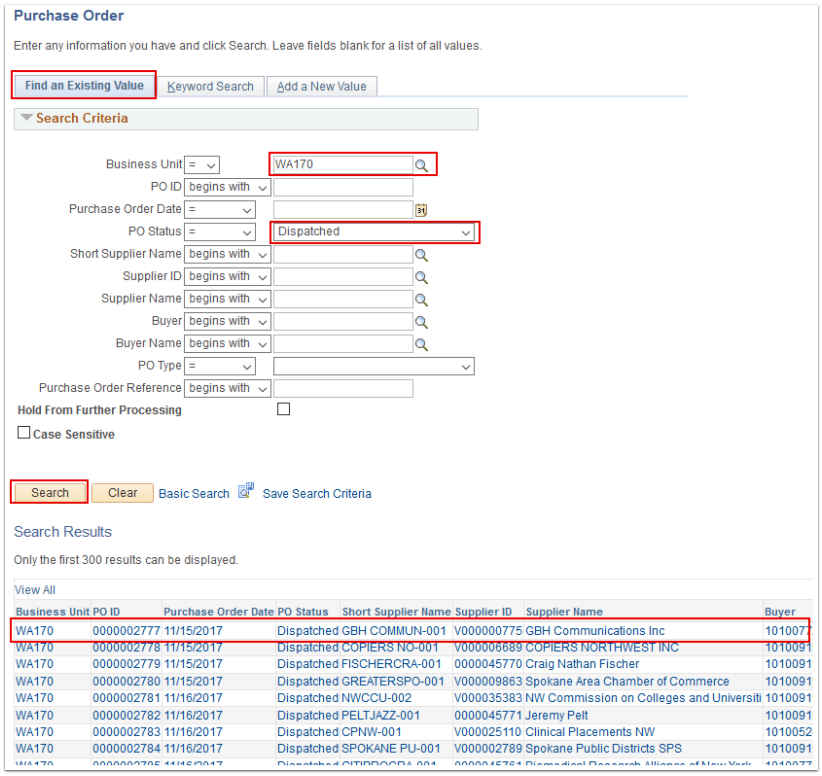
- User Preferences: Purchase Order Entry
- Buyer Setup

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

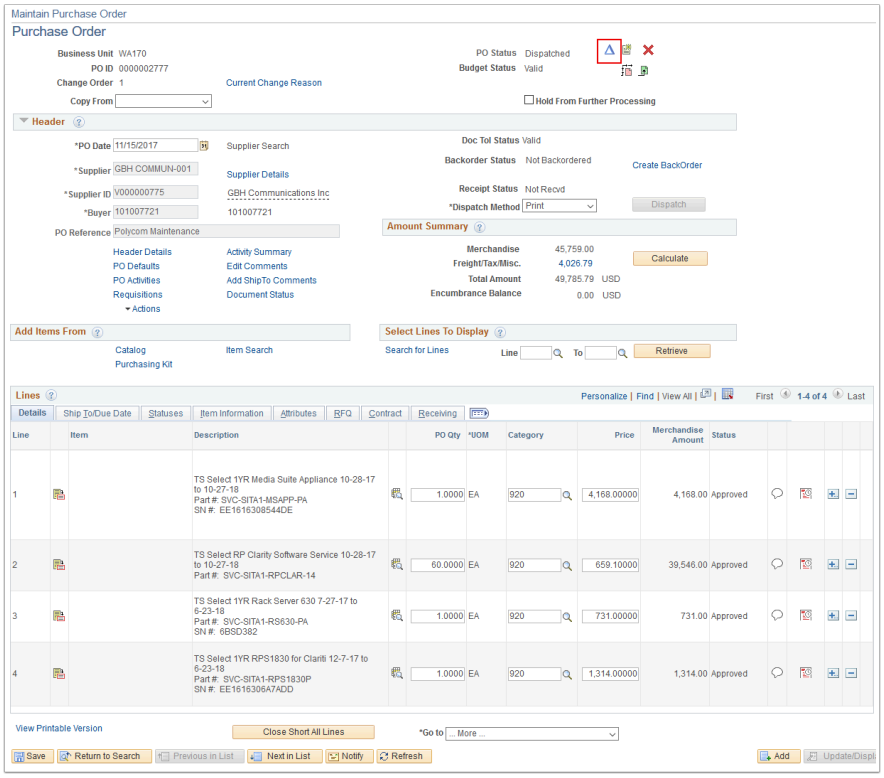
Navigation: NavBar > Navigator > Purchasing > Purchase Orders > Add/Update POs

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.

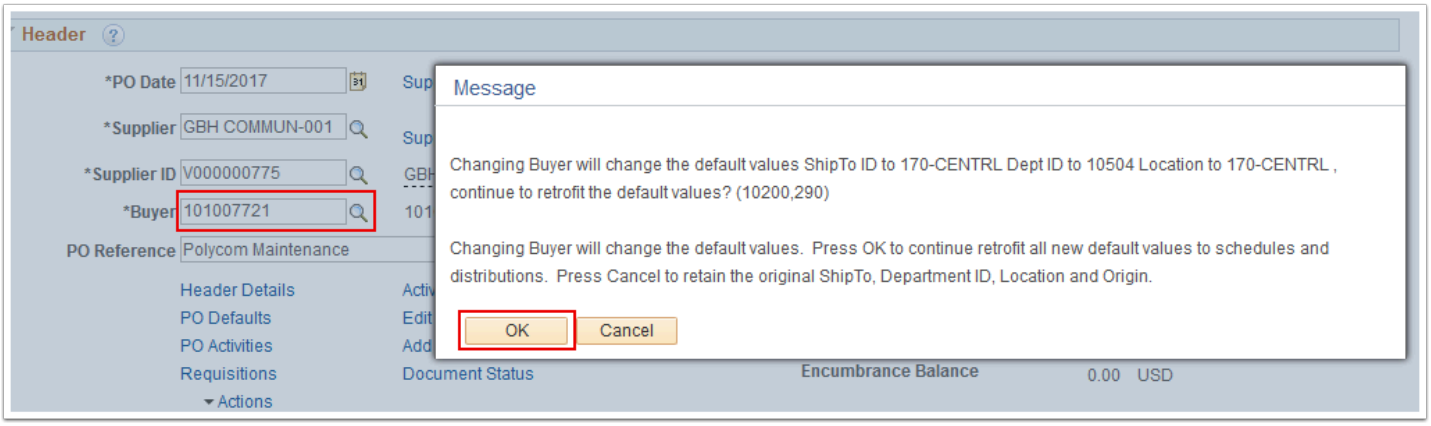


2. The **Purchase Order** page displays. Select the **Change Order** button.

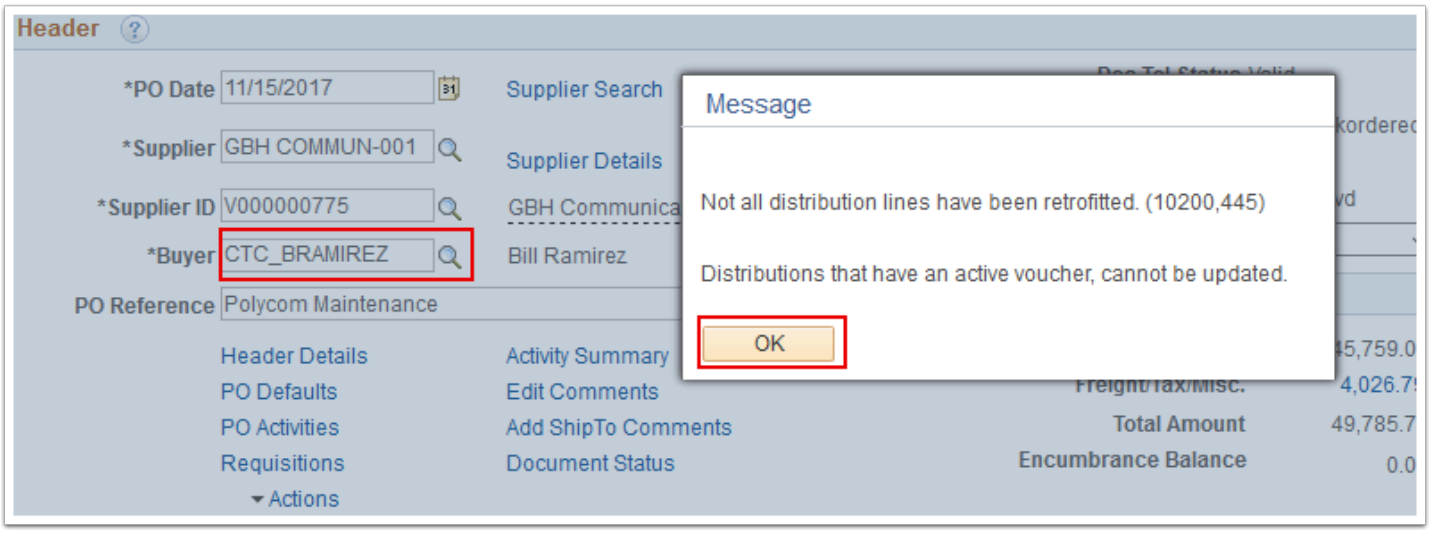
> **Note:** The fields that trigger change order generation become available for entry.



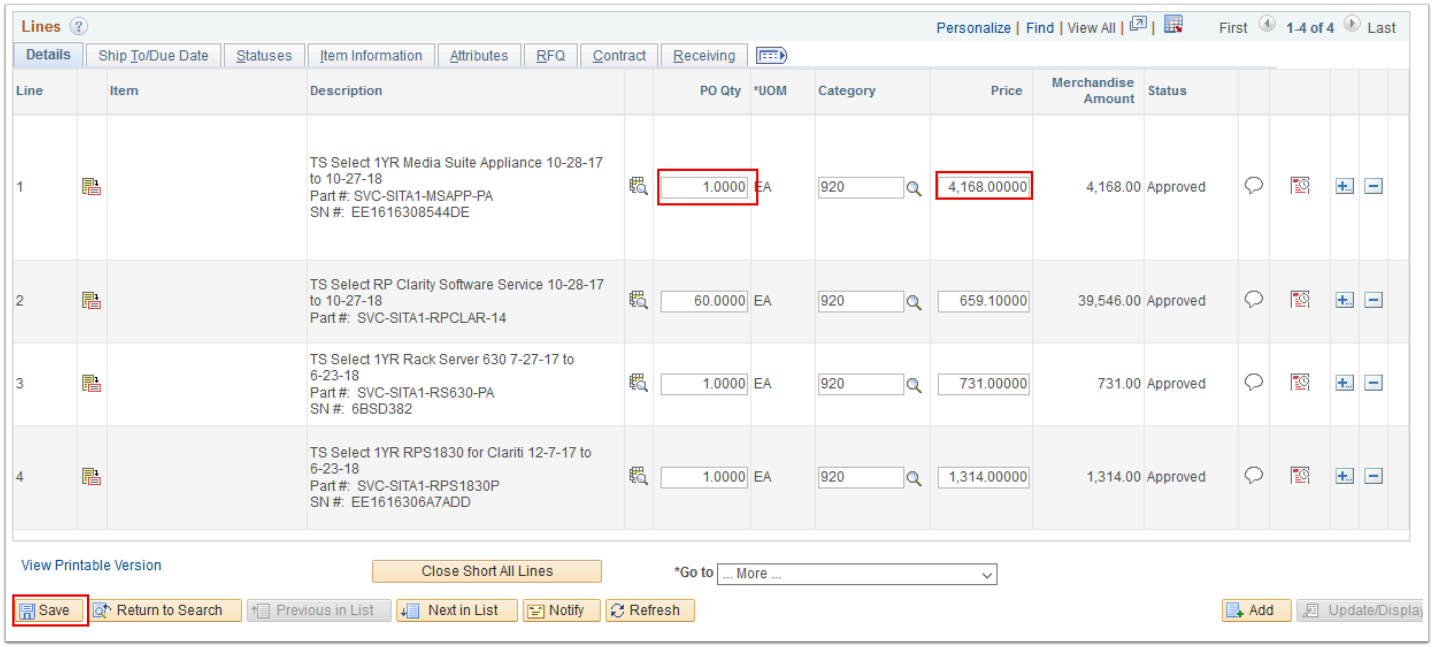
3. On the **Maintain Purchase Order** page update the Buyer in the **Buyer** field (if required). A message box displays. Read the message, then select **OK** to acknowledge the message.



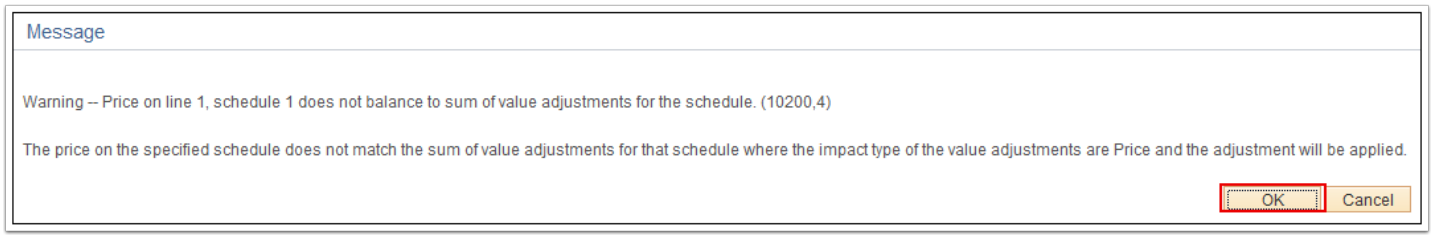
4. A second message box displays. Read the message, then select **OK** to acknowledge the message.



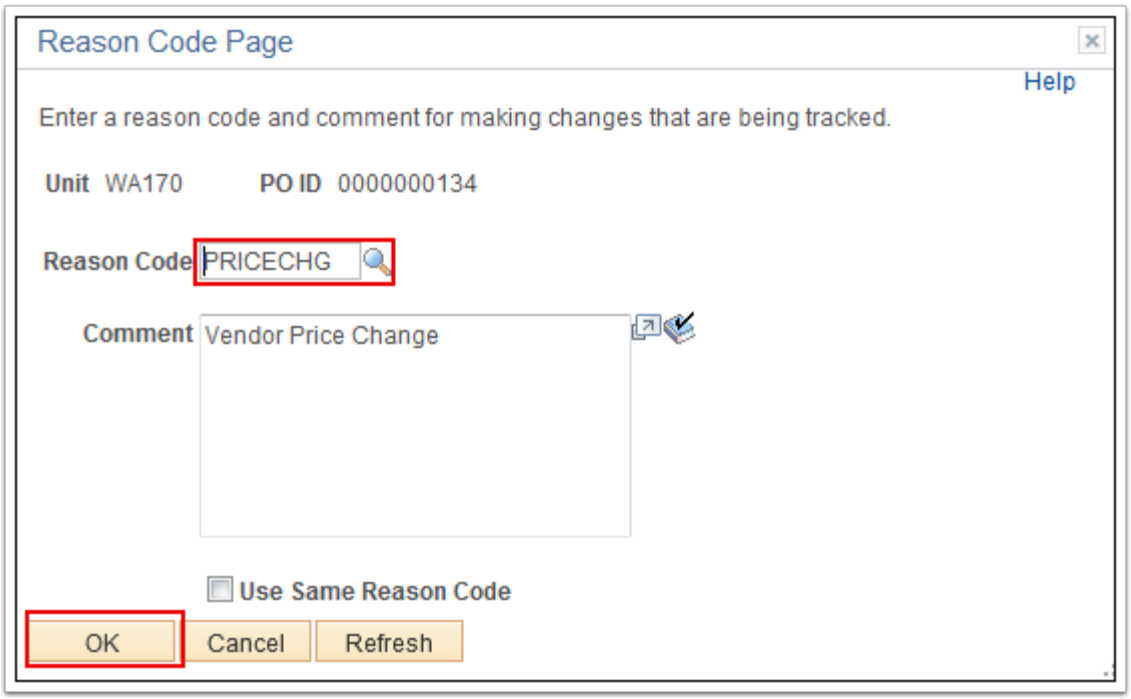
5. The updated **Purchase Order** page displays. If necessary, update the **PO Qty** and/or **Price** fields.
6. Select **Save**.



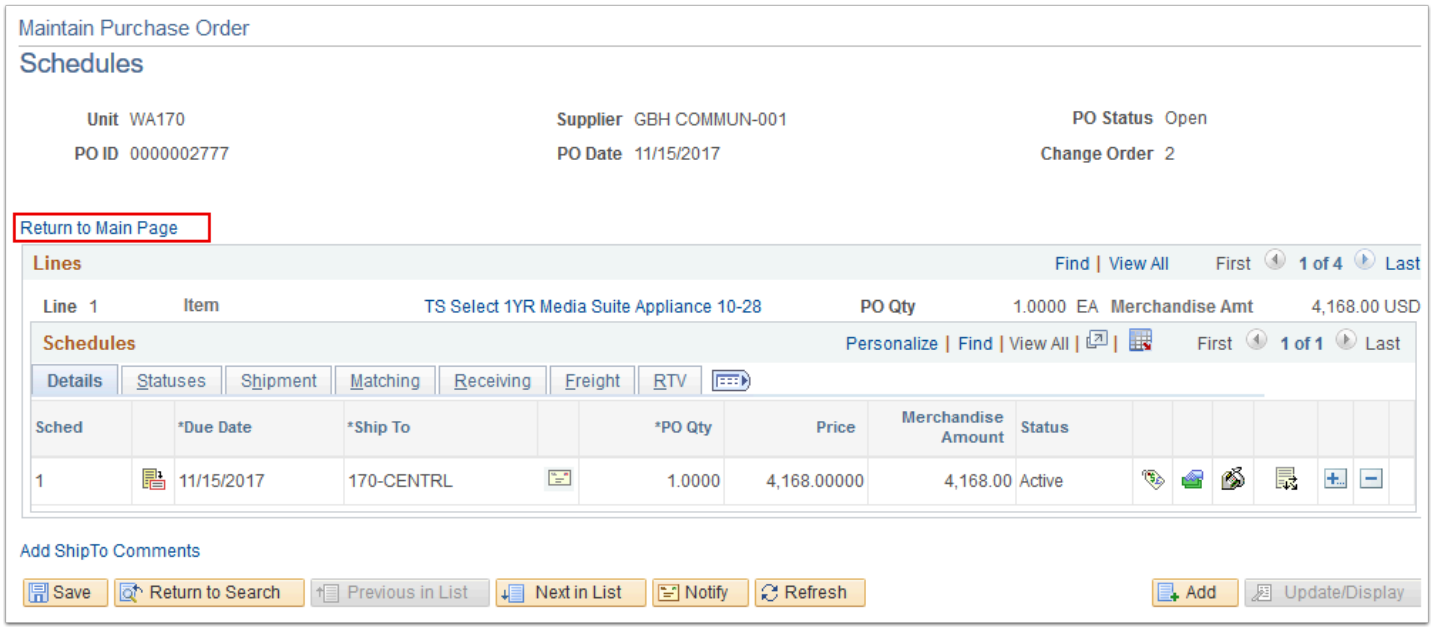
7. A message box displays. Read the message, then select **OK** to acknowledge the message.



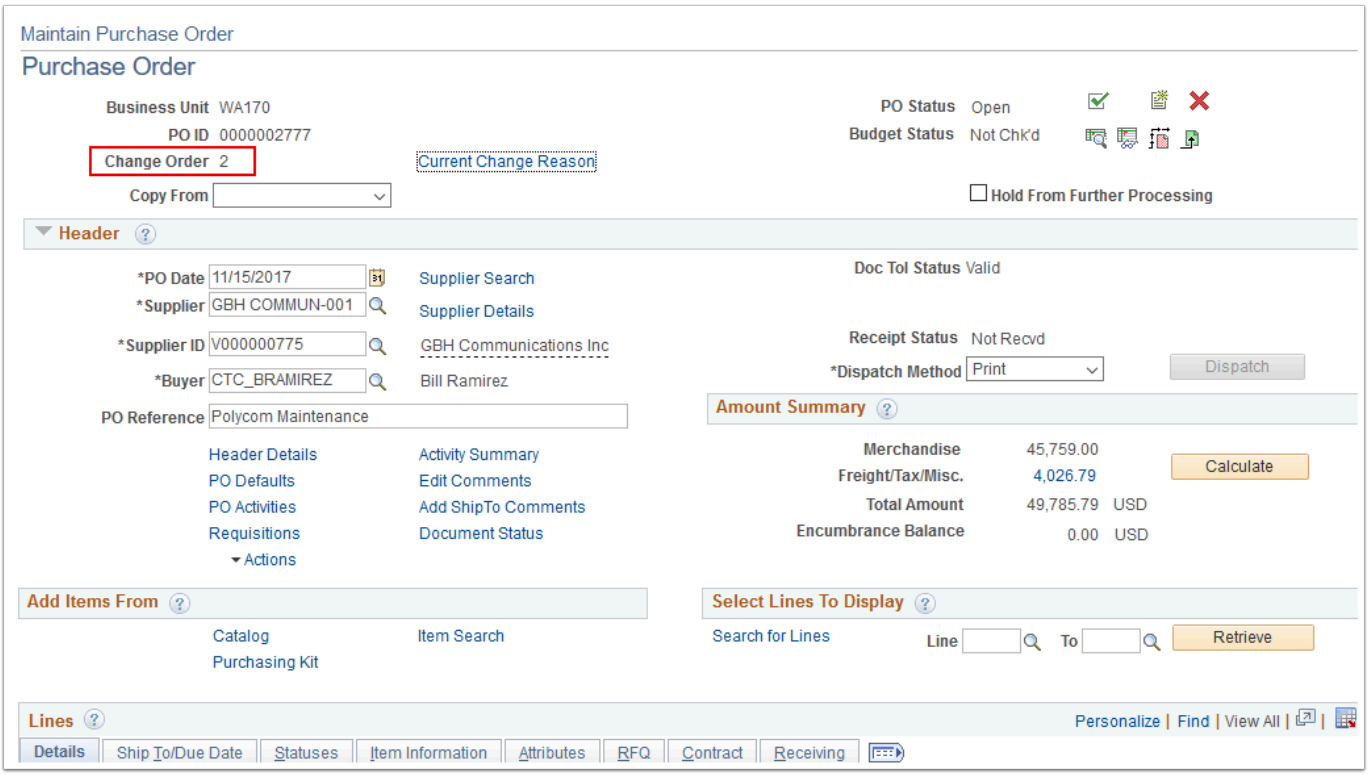
8. The **Reason Code** page displays. Complete the following:
   a. Enter or select the reason in the **Reason Code** field for the PO change order.
   b. Select the **OK** button.



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



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



11. Process complete.