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.

> ℹ️ **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.

Reason Code Page

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 1   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 Status** Open
PO ID 0000002777		**Budget Status** Not Chk'd
Change Order 2	Current Change Reason	
Copy From [▾]		☐ Hold From Further Processing

▼ Header ?

Doc Tol Status Valid

*PO Date 11/15/2017 📅	Supplier Search	
*Supplier GBH COMMUN-001 🔍	Supplier Details	**Receipt Status** Not Recvd
*Supplier ID V000000775 🔍	GBH Communications Inc	***Dispatch Method** Print [▾] [Dispatch]
*Buyer CTC_BRAMIREZ 🔍	Bill Ramirez	
PO Reference Polycom Maintenance		

Amount Summary ?

Header Details	Activity Summary	Merchandise 45,759.00
PO Defaults	Edit Comments	Freight/Tax/Misc. 4,026.79
PO Activities	Add ShipTo Comments	Total Amount 49,785.79 USD
Requisitions	Document Status	Encumbrance Balance 0.00 USD
▾ Actions		[Calculate]

Add Items From ?

Catalog	Item Search
Purchasing Kit	

Select Lines To Display ?

Search for Lines   **Line** [ ] 🔍 **To** [ ] 🔍 [Retrieve]

Lines ?

Personalize | Find | View All | 🔲 | 🖼

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

11. Process complete.