

9.2 Update Existing Purchase Order

Purpose: Use this document as a reference for making changes to an existing purchase order in ctcLink.

Audience: Purchase Order maintainers

 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.

Update Existing Purchase Order

Navigation: Purchasing > Purchase Orders > Add/Update POs

1. The **Purchase Order** search page displays. Select the **Find an Existing Value** tab.
2. Enter **Business Unit**.
3. Enter **PO ID**. Optional to add additional search criteria.
4. Select the **Search** button.
5. The **Maintain Purchase Order** page displays.
6. In the **Lines** section, select the **Add a New Row** **[+]** icon.

Manager Self Service **Purchase Order**

Maintain Purchase Order

Purchase Order

Business Unit WA170
PO ID 0000003205

PO Status Open
Budget Status Not Chk'd

Copy From

☐ Hold From Further Processing

Header

*PO Date 03/06/2019
*Supplier AFT COPE-002
*Supplier ID V000000001
*Buyer CTC_BRAMIREZ

Supplier Search
Supplier Details
American Federation of Teachers, AFL-CIO
Bill Ramirez

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print

Amount Summary

Merchandise 10,500.00
Freight/Tax/Misc. 0.00
Total Amount 10,500.00 USD
Encumbrance Balance

Add Items From

Catalog
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

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

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	050-59	Paper, Art, Various Types	30.0000	EA	050	350.00000	10,500.00	Approved

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

Save Return to Search Notify Refresh Add Update/D

7. The **Enter number of rows to add** window displays.
8. Enter the number of rows you'd like to add.
9. Select **OK**.

PO Status Open
Budget Status Not Chk'd

☐ Hold From Further Processing

Enter number of rows to add:

1

OK Cancel

Merchandise 10,500.00
Freight/Tax/Misc. 0.00
Total Amount 10,500.00 USD
Encumbrance Balance

10. The **Enter number of rows to add** window disappears. A new, blank row appears in the **Lines** section. Enter valid field values for:
 - a. **Item**.
 - b. **PO Qty**.
 - c. **Price**.

11. Select the **Schedule** icon.

Manager Self Service **Purchase Order**

Purchase Order

Business Unit WA170
PO ID 0000003205

PO Status Open
Budget Status Not Chkd

Copy From

☐ Hold From Further Processing

Header

*PO Date 03/06/2019
*Supplier AFT COPE-002
*Supplier ID V000000001
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Add Items From
Catalog
Purchasing Kit

Select Lines To Display
Search for Lines Line To Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	050-59	Paper, Art, Various Types	30.0000	EA	050	350.00000	10,500.00	Approved
2	050-60	Picture Frames and	1.0000	EA	050	100.00000	0.000	Approved

Schedule icon highlighted in the bottom right corner of the lines table.

12. The **Schedules** page displays. If you want you can change the ship to details otherwise leave default.

13. Select the **Distributions/Chartfields** icon.

Manager Self Service **Purchase Order**

Maintain Purchase Order

Schedules

Unit WA170
PO ID 0000003205

Supplier AFT COPE-002
PO Date 03/06/2019

PO Status Open

Return to Main Page

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
2	050-60	Picture Frames and Framing Sup	1.0000	EA	050	100.00000	100.00 USD	Active

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	03/06/2019	170-CENTRL	1.0000	100.00000	100.00	Active

Distributions/Chartfields icon highlighted in the bottom right corner of the schedule table.

14. The **Distributions for Schedule 1** window displays. Adjust Chartfields as necessary.

15. Select **OK**.

Distributions for Schedule 1

Unit WA170 Supplier AFT COPE-002
PO ID 0000003205 Item 050-60 Picture Frames and Framing Sup
Line 2
Schedule 1 Status Active

*Distribute By Quantity
*Liquidate By Amount
SpeedChart Multi-SpeedCharts

Schedule Qty 1.0000
Merchandise Amount 100.00 USD
Doc. Base Amount 100.00 USD

Distribution Personalize Find View All First 1 of 1 Last

Chartfields	Details/Tax	Asset Information	Req Detail	Statuses	Budget Information								
Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Oper Unit	Fund	Dept	Class	State Purpose	PC Bus Unit
1	Open	100.0000	1.0000	100.00 USD	WA170	1000070	7171	448	10504	014	N		

OK Cancel Refresh

16. The **Distributions for Schedule 1** window disappears. Select **Return to Main Page** link.

Manager Self Service Purchase Order

Maintain Purchase Order

Schedules

Unit WA170 Supplier AFT COPE-002 PO Status Open
PO ID 0000003205 PO Date 03/06/2019

Return to Main Page

Lines Find View All First 2 of 2 Last

Line	2	Item	050-60	Picture Frames and Framing Sup	PO Qty	1.0000 EA	Merchandise Amt	100.00 USD
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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	03/06/2019	170-CENTRL	1.0000	100.00000	100.00	Active

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display

17. The **Purchase Order** page displays.

18. Select the **Save** button.

Manager Self Service **Purchase Order**

Purchase Order

Business Unit WA170
PO ID 0000003205

PO Status Open
Budget Status Not Ch'd

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Add Items From

Catalog
Purchasing Kit

Select Lines To Display

Search for Lines Line To Retrieve

Lines

Personalize | Find | View All | First 1-2 of 2

Line	Item	Description	*Receiving Required	Inspection Required	Inspect ID	Close Short
1	050-59	Paper, Art, Various Types	Required	<input type="checkbox"/>		<input type="checkbox"/>
2	050-60	Picture Frames and	Required	<input type="checkbox"/>		<input type="checkbox"/>

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

Save Return to Search Notify Refresh Add Update

19. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.



VIDEOS COMING SOON!

Video Tutorial Via Panopto

View the external link to Update Existing Purchase Order. This link will open in a new tab/window.