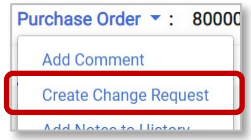
Creating a Change Order

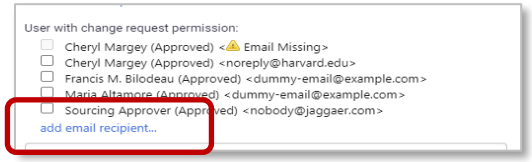
Change orders are used to make changes to a purchase order, such as adding/editing lines, comments or attachments, and adjusting the amount or chart of account allocation for an open PO.

1. Go into the PO to be changed. NOTE: Only ***open*** POs can be changed. To check status on the PO, go to the **Status** tab and scroll down to **Document Status → A/P status**.

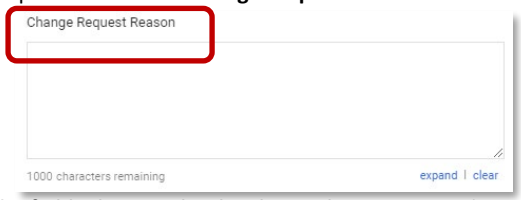
2. From the menu under **Purchase Order**, select **Create Change Request.**



3. You have the ability to send comments to individuals who participated on the original PO, add comments, and attach documents. Click **Create Change Request.**

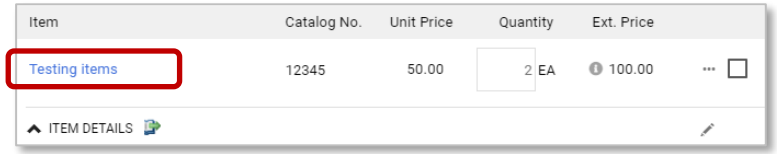


4. You are required to enter a **Change Request Reason**



4. **Update the fields that need to be changed**. Preparing a change request has the same look and feel as preparing a requisition. Update CoA codes, quantity, price, standing order checkbox, etc. as usual.

   Important*: The quantity can be updated directly in the individual line item. To edit Unit Price or other details you need to click the blue **Item** name hyperlink. The **pencil icon** will only allow you to edit the quantity and **ITEM DETAILS** section.*



5. After saving any changes, click the **Submit Request** button.

   The change request will now route through approvals and, following approval, update the original PO. A notification will be sent once the process is complete.

FAQ:

Change orders are used to make changes to a purchase order, such as:

- Adding/editing lines
- Adding comments or attachments
- Adjusting the amount
- Updating the chart of account allocation for an *open* PO
- Updating the PO to be an Amount Based Standing order (so invoices can be applied by amount instead of quantity)

Marketplace catalog and punchout orders

- Only create change orders for account coding and internal information
- Do not change item or quantity information, as the supplier will not be automatically notified of these changes.

Who can create a change order?

- Individuals with the Requestor role can create a change order
- Shoppers can request a change using a comment and sending it to their Requestor

CoA changes:

- Changes to account codes will not affect invoices that have already been matched to the PO, even if those invoices have not yet been paid

Can I use Ad-hoc functionality on a Change Order?

- Yes

Where to locate a returned cart:

- If your approver has returned the cart to you to create a change order, you can find it here: **Orders → My Orders → Draft Change Requests**

Invoices

- Invoices already matched against a PO will retain the original account codes from when they were matched. They will not pick up changes to account codes made during a change request process. Only new invoices entered after the change request is complete/approved will adopt the new coding.