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, navigate to: Document Status → A/P status.

2. Click the PO number to open the PO.


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

5. Update 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: to update quantity or amount, be sure to click the More Information hyperlink next to product description (the line edit button only allows you to add to comments).

6. 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)

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

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