

# Hot Sheet



Topic	Best Practice for Adding Items using a Change Order
<b>Document Types Involved</b>	Bid <input type="checkbox"/> Requisition <input type="checkbox"/> PO <input checked="" type="checkbox"/> Receipt <input type="checkbox"/> Invoice <input type="checkbox"/> Credit Memo <input type="checkbox"/> Report <input type="checkbox"/> Vendor <input type="checkbox"/> User Profile <input type="checkbox"/> Agency Setup <input type="checkbox"/> Other <input type="checkbox"/>
<b>Reason for Publication</b>	When users are adding Items using a Change Order it appears they are often reapplying HEADER Accounting to all items. This appears to cause errors during the AFIS integration.
<b>Steps Resulting in Scenario</b>	<ol style="list-style-type: none"> <li>1. The agency needs to add another item to the Purchase Order</li> <li>2. The authorized user started a change order to complete the addition.               <ol style="list-style-type: none"> <li>a. The user added the item on the ITEMS &gt; GENERAL tab.</li> <li>b. The user went to the HEADER &gt; Accounting tab and clicked <b>Rebuild for all Items</b>.                    That causes the same accounting to be reapplied to the existing items, in addition to the newly added item. This results in the PO receiving an error at the next integration point: <b>ERROR : Header : The document could not be submitted due to errors.; ERROR : Funding Total does not equal Commodity Line Total (A159);</b> </li> </ol> </li> </ol>
<b>Recommended Strategy</b>	<p><b>PREREQUISITE</b></p> <ul style="list-style-type: none"> <li>➤ When the document is a Release, the person who created the document will need to complete these steps OR a BP user that has the DA Super User role for the Department on the document can complete these steps.           <ul style="list-style-type: none"> <li>▪ IF the BP user attempts the Change Order Processing, they will need to be in the DA Tab/Role when they complete the process.</li> </ul> </li> </ul> <p><b>STEPS – Complete the Item Addition</b></p> <ol style="list-style-type: none"> <li>1. Go to the ITEMS &gt; GENERAL Tab           <ol style="list-style-type: none"> <li>a. ADD the Item(s) that need to be added.</li> </ol> </li> <li>2. Add the Accounting for the Added items on the ITEMS &gt; ACCOUNTING tab using either of these methodologies:           <p><b><u>Apply Existing Accounting from One item to the new item</u></b></p> <ol style="list-style-type: none"> <li>a. Click the Select check box for the new item</li> <li>b. Select the item number that has the accounting you want to apply in the Copy Accounting from Item Number dropdown.</li> <li>c. Click the Apply to Selected button to place the existing accounting on your new item(s)</li> </ol> </li> </ol>

**OR**

**Enter Accounting on the Item**

- a. Click the number of the new item
  - b. Type the accounting into the appropriate segments
  - d. Click one of the Save options
3. Click the Summary tab
- a. Review your information
  - b. Click Submit for Approval
4. APPLY the Change Order after it has completed all approvals

**1) Add New Item on the General Tab**

**Change Order (In Progress) - Release Purchase Order ADSPO15-085238:498** Status: 3PS - Sent

General **Items** Subcontractors Address Accounting Attachments Summary [Back to PO](#)

**General** Address Accounting

Sort by Column: Print Sequence  Sort Descending

Item #	Links	Print Sequence	Item Description									Total Cost	C
			Receipt Method	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate		
1	Master Blanket # / Line #: <a href="#">ADSP015-085238 / 1</a> Req # / Item #: <a href="#">TRAIN15-00253828 / 1</a>	1.0	( 553 - 30 ) widget									\$12.00	
			Quantity	2.0	0.0	\$6.00	\$6.00	EA - Each	0.00	\$0.00			
2	Master Blanket # / Line #: <a href="#">ADSP015-085238 / 2</a>	2.0	( 553 - 30 ) whatsit									\$10.00	
			Quantity	1.0	0.0	\$10.00	\$10.00	EA - Each	0.00	\$0.00			
Total											\$22.00		

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**Screenshots**

Screenshots

**2) Apply existing accounting from Item 1 to the New Item 2**

- a) Click the Select check box for item 2 (blue rectangle)
- b) Select the item number that has the accounting you want to apply to the new item from the drop-down (orange rectangle)
- c) Click Apply to Selected (green rectangle) to place the accounting on your new item,

**Change Order (In Progress) - Release Purchase Order ADSP015-085238:498** Sta

General | **Items** | Subcontractors | Address | Accounting | Attachments | Summary | [Back to PO](#)

General | Address | **Accounting**

**Account Validation Errors**

- Item# 2: Accounting distribution is missing and required.

Item #	(Account Distribution)Item Description	Select All
<input type="checkbox"/> 1	(100.0% ) widget	<input type="checkbox"/>
<input checked="" type="checkbox"/> 2	(0.0% Less than 100% ) whatsit	<input checked="" type="checkbox"/>

Copy Accounting From Item # 1 ▾

**OR**

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## 2) Enter the accounting directly on the New Item 2

a) Click the Number for the item – in this case 2

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General Items Subcontractors Address Accounting Attachments Summary [Back to PO](#)

General Address Accounting

**Account Validation Errors**

- Item# 2: Accounting distribution is missing and required.

Item #	(Account Distribution)Item Description
⊕ 1	(100.0% ) widget
2	(0.0% Less than 100% ) whatsit

Copy Accounting From Item # 1 ▼

b) Enter the accounting directly on the Accounting line and save.

**Change Order (In Progress) - Release Purchase Order ADSP015-085238:498**

General Items Subcontractors Address Accounting Attachments Summary [Back to PO](#)

General Address Accounting

Item #2: whatsit

Delete All	Fiscal Year	Budget Fiscal Year*	Accounting Template	Function	Sub Function	Unit	Sub Unit	Fund	Sub Fund	ApprUnit	Object
<input type="checkbox"/>	15	2015		RMDADM9780							6011

Event Type : PR05 ▼

Screenshots

Screenshots

### 3) User Submits for Approval / Apply Change Order

Release Purchase Order ADSP015-085238:498 Status: 3PRS - Ready to Send 

General | Items | Vendor | Address | Accounting | Routing | Attachments | Notes | **Change Orders(3)** | Reminders | Summary

**Header Information**

<b>Purchase Order Number:</b>	ADSP015-085238	<b>Release Number:</b>	498	<b>Short Description:</b>	Resolve Integration Error
<b>Status:</b>	3PRS - Ready to Send	<b>Purchaser:</b>	Elli Balstad	<b>Receipt Method:</b>	Quantity