

Change Orders

This Quick Reference Guide provides an overview of the steps required to process Change Orders in ProcureAZ. A Change Order is the mechanism used to modify any Purchase Order (PO) that has been sent to a vendor, including amendments to term contracts. These changes include, but are not limited to:

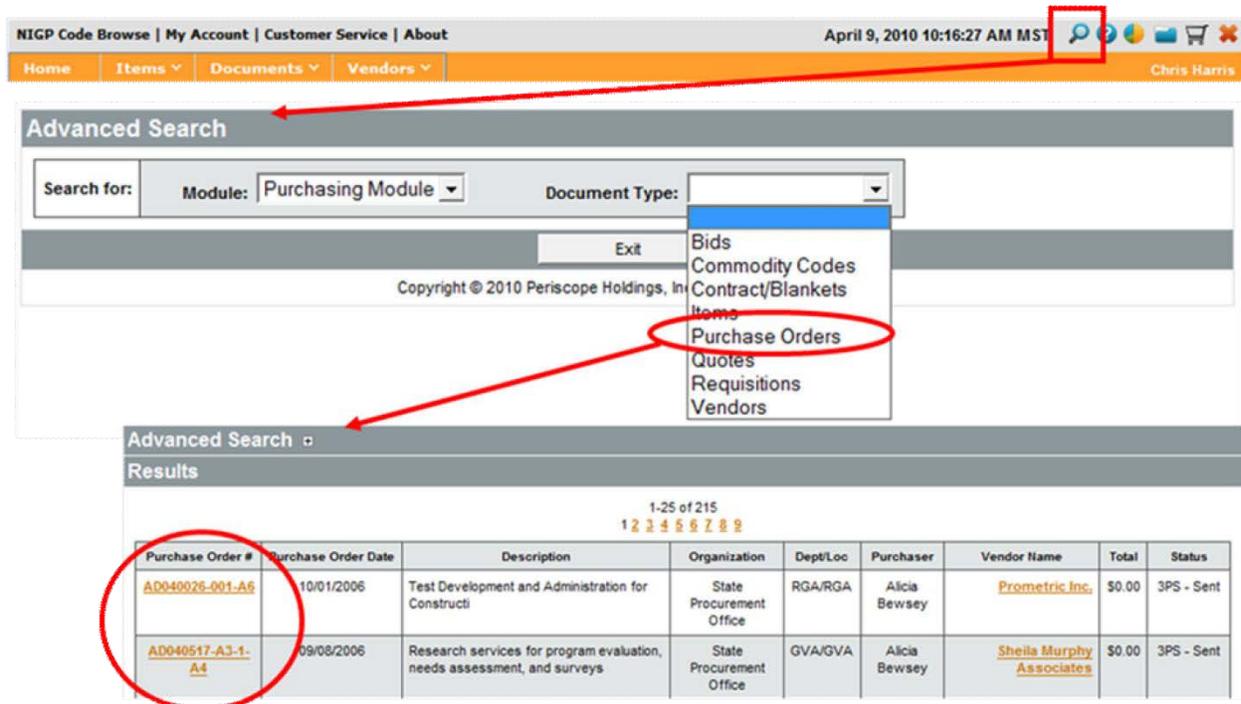
- Changes to ordered quantities
- Changes to pricing
- Changes in terms and conditions
- Changes in account distribution

! Please Note: [Change orders are NOT allowed on MAXIMO POs](#)

Finding the PO

Once a PO has been sent to the vendor, it is in “Sent” status. As the goods or services associated with the document are received, the PO may enter “Partial Receipt” and “Complete Receipt” statuses. Change Orders can be processed against a PO in any of these statuses. To create a Change Order against a PO, first you must find the PO.

To access the PO, use the Advanced Search feature. Select “Purchase Orders” in the **Document Type** dropdown, then search by either the number of the document, by the procurement officer name in the **Buyer** field, by the end-user name in the **Requestor** field, by the description of the document, or any of the other available **Search Fields**. Once your results return, locate your PO and click the link in the **Purchase Order #** column to view the document.



Advanced Search

Search for: Module: Purchasing Module Document Type: [Dropdown]

Exit

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Advanced Search ▾

Results

1-25 of 215
1 2 3 4 5 6 7 8 9

Purchase Order #	Purchase Order Date	Description	Organization	Dept/Loc	Purchaser	Vendor Name	Total	Status
AD040026-001-A6	10/01/2006	Test Development and Administration for Constructi	State Procurement Office	RGA/RGA	Alicia Bewsey	Prometric Inc.	\$0.00	3PS - Sent
AD040517-A3-1-A4	09/08/2006	Research services for program evaluation, needs assessment, and surveys	State Procurement Office	GVA/GVA	Alicia Bewsey	Sheila Murphy Associates	\$0.00	3PS - Sent

Creating Change Orders

After locating the PO you want to modify, click on the Change Orders tab. All Change Orders processed previously will be listed. If you are authorized to create a Change Order for that PO, you will see a **Create Change Order** button. Click the button to begin the change order process.

Change Orders



Open Market Purchase Order ADSP010-000313 Status: 3PS - Sent

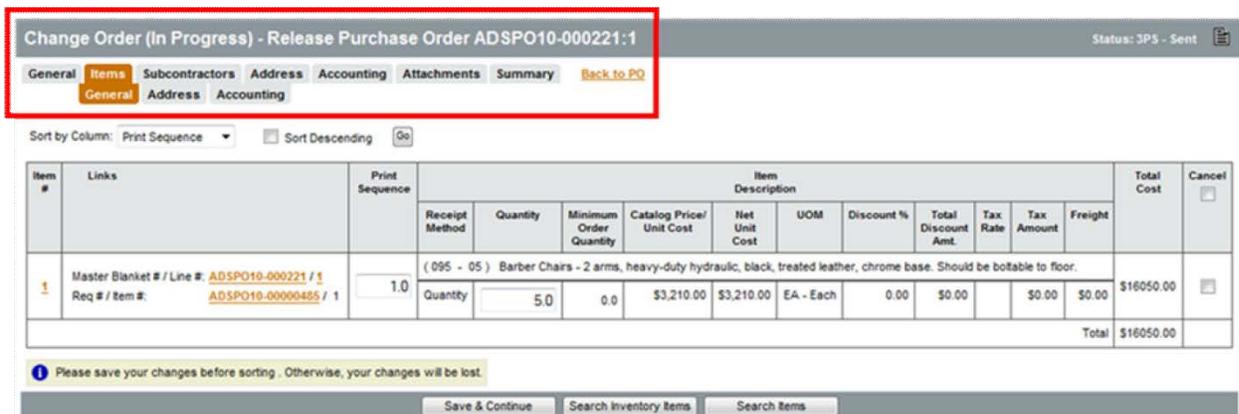
General Items Vendor Address Accounting Routing Attachments Notes(1) **Change Orders** Reminders Summary

There are no change order for this document.

Create Change Order

Once the Change Order document is created, you can edit any of the following tabs from the Purchase Order:

- **General Tab:** Overall data related to the contract/purchase order;
- **Items:** Item-level information, including pricing, quantity, description, etc. You can also cancel individual items from this tab;
- **Subcontractor:** If subcontractors are being tracked on the purchase order, you can update subcontractor data in case of termination, etc;
- **Address:** Bill-to and Ship-to addresses can be modified at the header or item level;
- **Accounting:** Account code distribution can be updated at the header or item level;
- **Attachments:** New attachments can be added to the contract/purchase order and you can choose whether to make the attachment visible to the vendor.



Change Order (In Progress) - Release Purchase Order ADSP010-000221:1 Status: 3PS - Sent

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

Sort by Column: Print Sequence Sort Descending

Item #	Links	Print Sequence	Item Description											Total Cost	Cancel
			Receipt Method	Quantity	Minimum Order Quantity	Catalog Price/Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight		
1	Master Blanket # / Line #: ADSP010-000221 / 1 Req # / Item #: ADSP010-00000485 / 1	1.0	(095 - 05) Barber Chairs - 2 arms, heavy-duty hydraulic, black, treated leather, chrome base. Should be boltable to floor.		5.0	0.0	\$3,210.00	\$3,210.00	EA - Each	0.00	\$0.00	\$0.00	\$0.00	\$16050.00	<input type="checkbox"/>
Total													\$16050.00		

i Please save your changes before sorting. Otherwise, your changes will be lost.

NOTE: Vendors cannot be modified through Change Orders. Rather, if you need to assign a PO to a new vendor, you must cancel the existing PO and create a new PO for the new vendor.

Finalizing and Submitting Change Order

Once you have made all required edits on the Change Order, the Summary tab will automatically list the changes made. If you want to provide additional description of the changes made, you can:

- Add a comment that applies to the whole change order;
- Add additional comments for each individual modification on the change order;
- Edit the description of the modifications made on the change order in the **Description** field;
- Decide whether to show vendors each modification (example: you can uncheck **Show to Vendor** if you don't want to notify them of account code changes).

Change Orders

Change Order (In Progress) - Release Purchase Order ADSP010-000221:1 Status: 3PS - Sent

General Items Subcontractors Address Accounting Attachments **Summary** Back to PO

Comment for the whole change order:

Header/Item Changes

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	1	Quantity changed from "5" to "7.0"	Chris Harris	08/17/2010 02:21:28 PM	<input checked="" type="checkbox"/>

Comment:

Bilateral Change Orders

If you want the vendor to accept or reject the Change Order before it is applied to the PO, you can use ProcureAZ's bilateral Change Order feature. This will route the Change Order to the vendor for approval following your internal approvals. To trigger this feature, check **Bilateral Change Order Enabled** on the Summary tab of the Change Order.

Bilateral Change Order

Bilateral Change Order Enabled (Approval by Vendor will be required)

Save & Continue Submit for Approval Delete Change Order

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Once all edits are done, click **Submit for Approval**. Any approval paths that apply to this change order will be triggered. In addition, for Bilateral Change Orders, you can select which Vendor user(s) to notify to request approval.

Bilateral Change Order is enabled. The vendor will be added as the final approver. The vendor users selected below will receive the approval notification email.

Vendor	Users
000000696 - Sportime LLC	<input checked="" type="checkbox"/> Sean Bevan <input checked="" type="checkbox"/> Test Vendor

Save & Continue Cancel & Exit

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Applying Change Orders

Once all approvals have been received, the Change Order will be listed on the Basic Purchasing user's homepage under the PO>Change Order tab. Open the change order, and click **Apply Change Order** on the Summary tab. The PO will be updated with all changes once applied and if any changes were selected to "Show to Vendor," a notification will automatically be sent to the vendor.

Apply Change Order Delete Change Order

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