

Contract Amendments

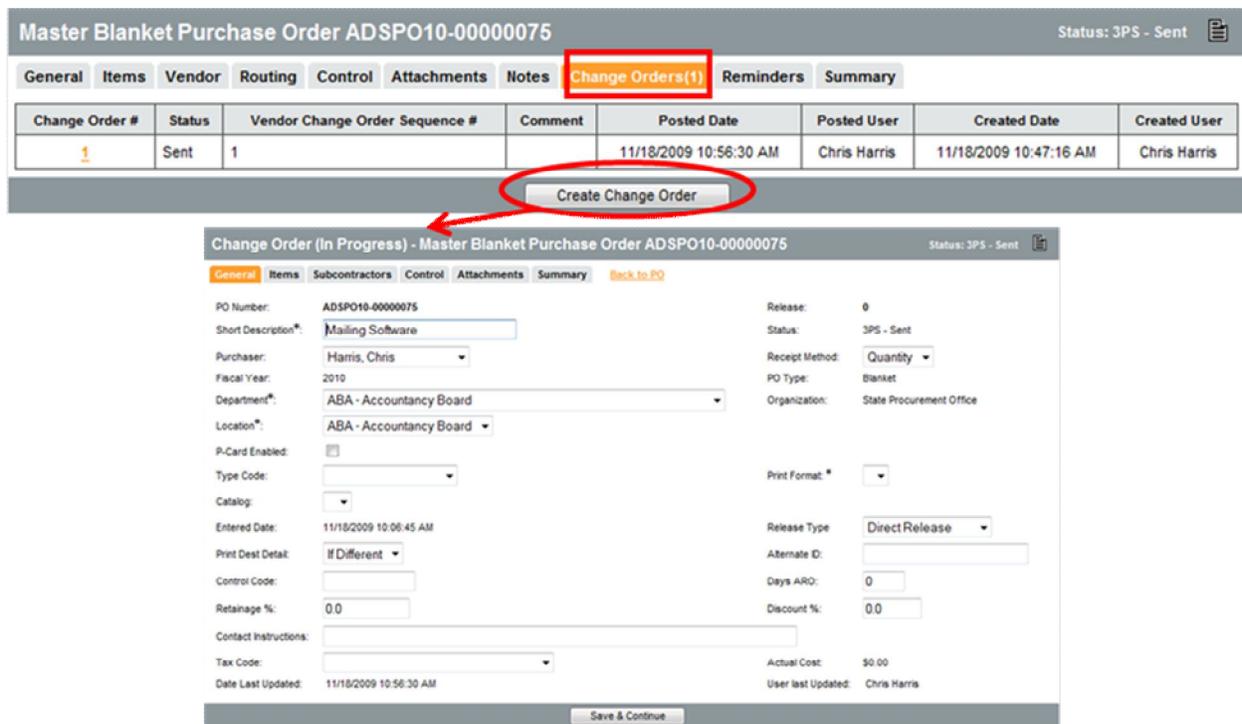
This Quick Reference Guide provides an overview of the steps required to process contract amendments in ProcureAZ. Change Order documents are the mechanism used to modify any contract (Blanket PO) that has been sent to a contractor. These changes include, but are not limited to:

- Changes to quantities
- Changes to pricing
- Changes in terms and conditions
- Contract extensions

Creating Change Orders

If you determine that an amendment to a contract is necessary, find the Blanket PO and select the Change Orders tab. From here you'll be able to view any previously completed amendments. If you have the appropriate rights, you'll also see a **Create Change Order** button. Creating a new Change Order will display a copy of the Blanket PO, but with only five tabs available to be edited.

You'll initially be shown the General tab, which allows you to edit all of the fields. If any changes are made, click **Save & Exit** before proceeding through the remaining tabs.



Master Blanket Purchase Order ADSP010-0000075 Status: 3PS - Sent

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

Change Order #	Status	Vendor Change Order Sequence #	Comment	Posted Date	Posted User	Created Date	Created User
1	Sent	1		11/18/2009 10:56:30 AM	Chris Harris	11/18/2009 10:47:16 AM	Chris Harris

Create Change Order

Change Order (In Progress) - Master Blanket Purchase Order ADSP010-0000075 Status: 3PS - Sent

General Items Subcontractors Control Attachments Summary Back to PO

PO Number: ADSP010-0000075 Release: 0
 Short Description*: Mailing Software Status: 3PS - Sent
 Purchaser: Harris, Chris Receipt Method: Quantity
 Fiscal Year: 2010 PO Type: Blanket
 Department*: ABA - Accountancy Board Organization: State Procurement Office
 Location*: ABA - Accountancy Board
 P-Card Enabled: Print Format:
 Type Code: Release Type: Direct Release
 Catalog: Alternate ID:
 Entered Date: 11/18/2009 10:06:45 AM Days ARO: 0
 Print Dest Detail: If Different Discount %: 0.0
 Control Code: Actual Cost: \$0.00
 Retainage %: 0.0 User last Updated: Chris Harris
 Contact Instructions:
 Tax Code:
 Date Last Updated: 11/18/2009 10:56:30 AM

Save & Continue

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

- **General Tab** – Overall data related to the contract
- **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 contract, you can update subcontractor data in case of termination, etc.

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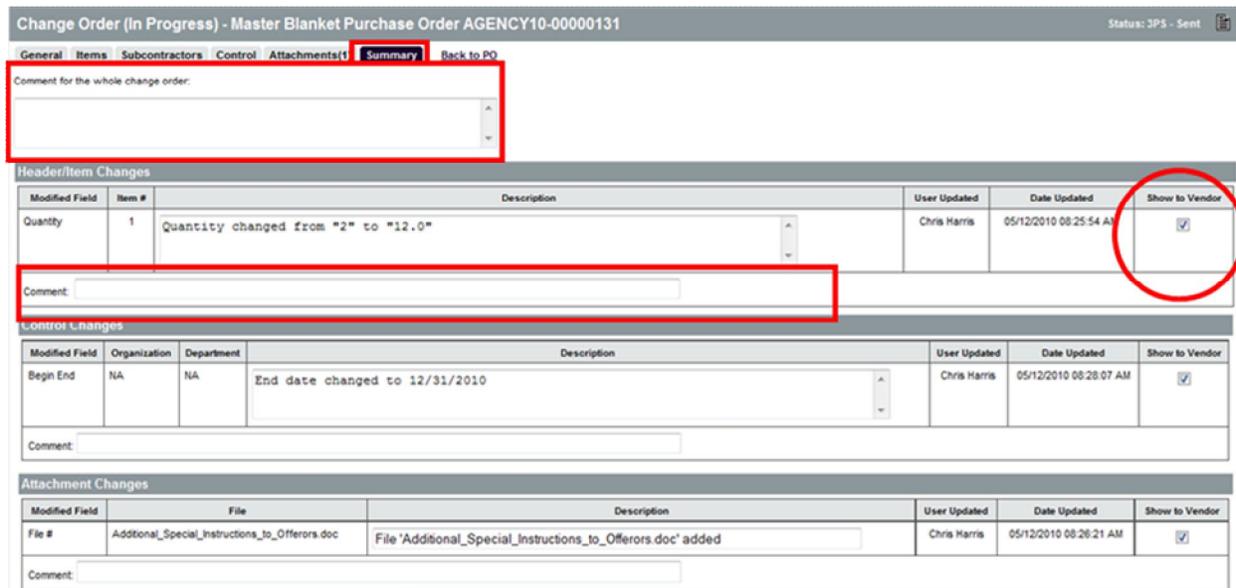
- **Attachments** – New attachments can be added to the contract, and you can choose whether to make attachments visible to the vendor.
- **Blanket/Contract Control** – The terms of the contract can be extended and the Organizations with rights to order off of the contract can be changed.

NOTE: The contractor cannot be modified through Change Orders. Rather, if you need to assign a contract/purchase order to a new vendor, you must cancel the existing Purchase Order and create a new Purchase Order to 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



Change Order (In Progress) - Master Blanket Purchase Order AGENCY10-00000131 Status: 3PS - Sent

General Items Subcontractors Control Attachments(1) **Summary** Back to PO

Comment for the whole change order:

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	1	Quantity changed from "2" to "12.0"	Chris Harris	05/12/2010 08:25:54 AM	<input checked="" type="checkbox"/>
Comment:					

Modified Field	Organization	Department	Description	User Updated	Date Updated	Show to Vendor
Begin End	NA	NA	End date changed to 12/31/2010	Chris Harris	05/12/2010 08:28:07 AM	<input checked="" type="checkbox"/>
Comment:						

Modified Field	File	Description	User Updated	Date Updated	Show to Vendor
File #	Additional_Special_Instructions_to_Offerors.doc	File 'Additional_Special_Instructions_to_Offerors.doc' added	Chris Harris	05/12/2010 08:26:21 AM	<input checked="" type="checkbox"/>
Comment:					

Bilateral Change Orders

If you want the vendor to accept or reject the Change Order before it is applied, 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**.



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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Contract Amendments

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
00000696 - Sportime LLC	<input checked="" type="checkbox"/> Sean Bevan <input checked="" type="checkbox"/> Test Vendor

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Applying Change Orders

Once all approvals have been received, the Change Order will be listed on the Procurement Officer's Homepage under the PO>Change Order tab. Open the Change Order, and click **Apply Change Order** on the Summary tab. The Blanket PO will be updated with all changes once applied.

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