



Change Orders Quick Reference Guide



OVERVIEW

In ObieBuy, a change order is issued when a Purchase Order needs to be modified. A change order may edit an existing PO quantity, price, account code or a change order may add or remove a line from a Purchase Order


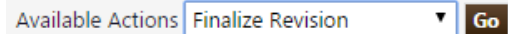
EDIT EXISTING LINE OR ACCOUNT CODE

To edit an existing quantity, price or account, perform the following steps:

EDIT THE PO

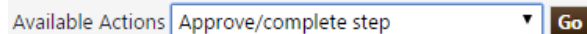
1. Navigate using the following menu path



2. Choose **Search** **Purchase Orders**, enter purchase order number from above and click **Go**.
3. Click on the **Purchase Order** tab. Toggle between the email and the purchase order and make required edits.
 - a. Edit a PO created from a Non-Catalog Form
 - i. To change an account number, click the **edit** in the Accounting Codes section and make appropriate edits.
 - ii. To change quantity or price click on the **more info...** link in the Line Item Details: Product Description and make appropriate edits.
 - iii. Choose Save from the Available Actions and click Go:
 
 - iv. Close the form.
 - b. Edit a PO created from a Non-Catalog Item
 - i. To change an account number, click the **edit** in the Accounting Codes section and make appropriate edits.
 - ii. To change the quantity or price click on the **more info...** link in the Line Item Details: Product Description and make appropriate edits.
 - iii. Click the **Save** button to save the changes.
 - c. Edit a PO created from a Catalog Item
 - i. To change an account number, click the **edit** in the Accounting Codes section and make appropriate edits.
 - ii. To change quantity, click on the **edit** in the Line Item Details: Product Description section and make appropriate edits.
 - iii. To change price, the Catalog Item associated with the contract will need to be updated.
 - iv. Click the **Save** button to save the changes.
4. When edits are made, finalize the revision in Available Actions and click **Go**:
 

5. Note reason for change, edit distribution if necessary and click **Save**

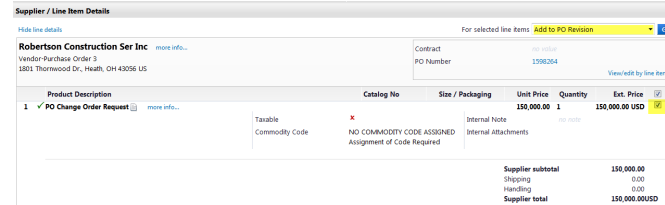
6. **Approve/complete step under Available Actions and click **Go**:**

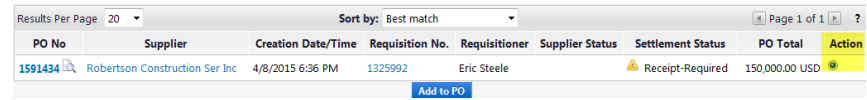


ADDING A LINE

To add an additional line to a PO, perform the following steps:

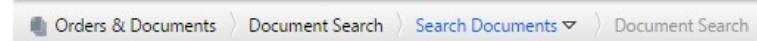
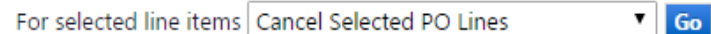
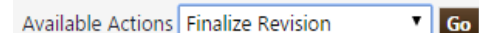
1. Review the Purchase Order and determine if the order was created from a non-catalog requisition, a non-catalog item, a catalog item or a punch-out.
2. Create a cart for the new line item, using the ordering method determined step 1 above.
3. Under **Supplier / Line Item Details**, select the check box at the end of the line you wish to add, change action to **Add to PO Revision** and click **Go**.



4. Enter the PO number which is be revised and click **Go**
 5. Select the **Action** radio button and click **Add to PO**
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6. Click on the PO number and proceed to the Purchase Order. Repeat steps 4-6 from EDIT THE PO.

CANCELING A LINE

To cancel a PO line, perform the following steps:

1. Locate the original PO by using the following menu path:
 
2. Choose **Search** **Purchase Orders**, enter purchase order number from the change order form or the e-mail request and click **Go**.
3. Click on the **Purchase Order** tab.
4. Click on the **more info...** link in the Line Item Details: Product Description and reduce price to \$0. In Available Actions at the top of the page, select save, click **Go** and **Close**
5. Click the check box at the end of the line to be cancelled **0.00 USD** **edit**
6. In the line action box select Cancel Selected PO Lines and click Go
 
7. Specify the reason for cancelling the PO line and click **Cancel Selected PO Lines**
8. When edits are made, finalize the revision in Available Actions and click **Go**

9. Note reason for change, edit distribution if necessary and click **Save**
10. **Approve/complete step under Available Actions and click **Go**:**
