CREATING A CHANGE ORDER
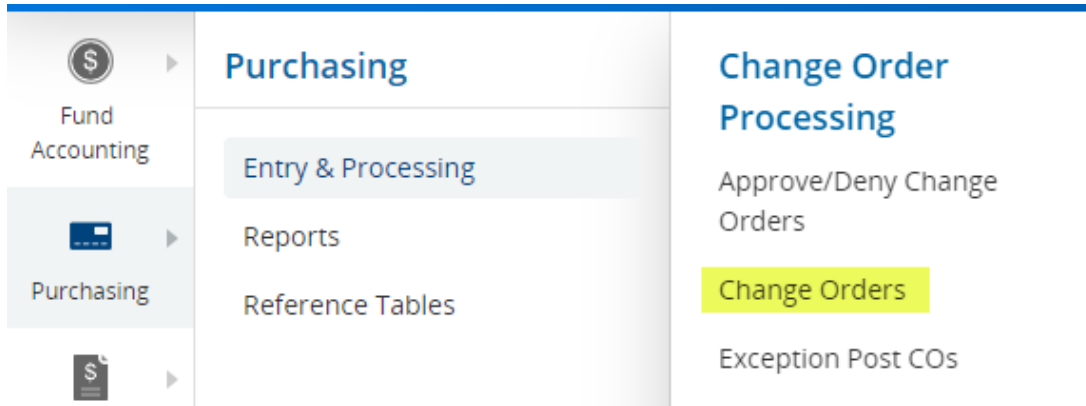
STEPS

1. On the left hand side of the screen click *Main Menu → Purchasing → Change Order Processing → Change Orders*

2. Click **the (+) button** at the top left of the screen to begin your new Change Order.

3. Under **General Section** enter the **PO number** and click **BLUE CHECK**

4. The change order screen will appear. Select the item you will be changing and click **BLUE CHECK.**

5. The Change Orders Detail screen will appear. Here you may change the **Quantity, Pricing or Trade-in/Discount**.

To enter a:

Quantity Adjustment
Enter the number of units to add or subtract from the original quantity. For example, to reduce the quantity from 10 to 7 units, enter *-3.00*.

Price Adjustment
Enter the dollar-and-cents amount to add or subtract from the original per unit price. For example, to reduce the per unit price from 5.00 to 4.50, enter *-0.50*.

Trade-in/Discount
Enter the dollars-and-cents amount to add or subtract from the original trade-in or discount value. For example, to reduce the discount from 10.00 to 8.00, enter *-2.00*.

Budget Code Change
If you did not change the cost but need to change the **line item's distributions (aka Budget Code)**, you can adjust the amounts charged to individual accounts. Do not do a qty or price adjustment. Click ok until it brings you to the charging information.
Use a negative number to subtract an amount from account, and then use a positive number to add the amount to another account.

If needed, you can also add new budget unit/account combinations. Use the **Insert Row** and **Delete Row** items to add or delete lines

6. Then hit **Tab.** The results of your entries will display in the tab's **New Extended**, **New Total**, and **Total Adjustment** fields.

7. In the **Continuous field**:
    • If you are adjusting an additional line item, leave the checkbox selected.
    • If you are not adjusting another line item, clear the checkbox.

8. Click **Tab** to access the **Charging Information section**, which displays the account distributions from the purchase order.

If you changed the line item's cost, you need to reflect the change in the **Amount field** under **Charging Information**. For example, if an item's cost was reduced by 10.00, enter *-10.00* in the **Amount field**. **Amount** field must be the same as **Total Adjustment**

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If needed, you can also add new budget unit/account combinations. Use the **Insert Row** and **Delete Row** items to add or delete lines.

9. Click **OK**, when you finish updating the distributions.
    • If the detail page's **Continuous field** was selected, repeat above to change the next line item. If you started changing the next item without intending to do so, click **Back**, then proceed to Step 11.

10. If the **Continuous field** is not selected, you will return to the Change Orders header window. Proceed to Step 11.

11. In the **Change Orders header page**, click **Save** to save the change order.