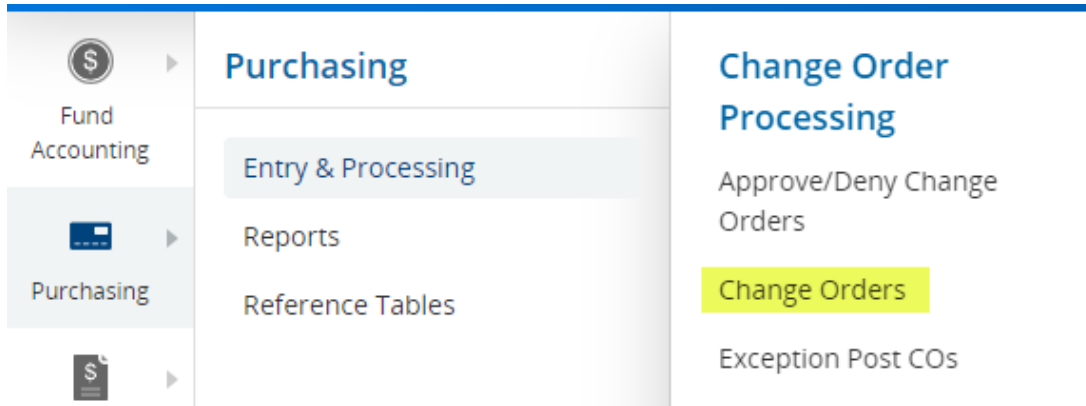


CREATING A CHANGE ORDER

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**

The screenshot shows the 'General' section of a form. It includes a 'Purchase Order *' field with a text input box and a 'Change' button. To the right is a 'Continuous' checkbox which is checked. Below these are 'Status' and 'Change' dropdown menus. The 'APPROVAL GROUP' section has three radio buttons: 'Blanket', 'Contract', and 'Confirming', all of which are selected.

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

Change Orders - La Porte ISD 22.4 Live

Approval Status

Date: 02/28/2023 Period: 8/23

General

Purchase Order * 233098 Change 1 Continuous

Status C - Complete

Change 02/28/2023

APPROVAL GROUP BAKER012 - BAKER 6TH GRADE CAMPUS

Blanket Contract Confirming

Vendor Delivery

Vendor Information

Vendor 1006762

Issued 02/27/2023

Required

Expires

Vendor Address

LIBERTY OFFICE PRODUCTS
PO BOX 630729
HOUSTON TX 77263

| Change | Item | Description | Quantity | Unit Price | Total Price | BUDGET CODE | Account | Title | Approval Status |
|--------|------------|-------------|----------|------------|-------------|------------------|---------|--------------------------|-----------------|
| 1 | HP 58A INK | | 1.00 | 75.7300 | 75.73 | 1993110004211012 | 6396 | GF BKR SUPPLIES/COMPUTER | O - Open |

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

Tax Rate

Date: 02/28/2023 Period: 8/23

General

Purchase Order 233098 1 Continuous

Change 1

Commodity 207-72

Details Pricing **Pricing Adjustments**

Quantity Adjustment 0.00

Price Adjustment 0.0000

New Extended

Trade-in/Discount 0.00

Shipping Adjustment 0.00

Tax Adjustment 0.00

New Total

Total Adjustment

Charging information

| BUDGET CODE | Account | Title | PROJECT | Account | Remain Bal | Amount |
|------------------|---------|--------------------------|---------|---------|------------|--------|
| 1993110004211012 | 6396 | GF BKR SUPPLIES/COMPUTER | | | 75.73 | 0.00 |

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

- Then hit **Tab**. The results of your entries will display in the tab's **New Extended**, **New Total**, and **Total Adjustment** fields.
- 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.
- Click **Tab** to access the **Charging Information section**, which displays the account distributions from the purchase order.

Insert Row Delete Row

Date: 02/28/2023 Period: 8/23

General

Purchase Order Continuous
 Change
 Commodity

Details Pricing **Pricing Adjustments**

Quantity Adjustment Shipping Adjustment
Price Adjustment Tax Adjustment
 New Extended **New Total**
 Trade-in/Discount **Total Adjustment**

Charging information

| BUDGET CODE | Account | Title | PROJECT | Account | Remain Bal | Amount |
|------------------|---------|--------------------------|---------|---------|------------|--------|
| 1993110004211012 | 6396 | GF BKR SUPPLIES/COMPUTER | | | 75.73 | 0.00 |

These 2 numbers must match

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**

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. 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.

- 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.
- If the **Continuous field** is not selected, you will return to the Change Orders header window. Proceed to Step 11.
- In the **Change Orders header page**, click **Save** to save the change order.

