Modify a Purchase Order

The following job aids specify the types of modifications that Requestors can make to a Purchase Order that was auto-generated from a Shopping Cart.

The Purchase Order must have a status of “Ordered.”

Click on a job aid below to receive step-by-step instructions on how to:

- Add Items to a PO
- Delete Items from a PO
- Increase/Decrease Quantity of a Line Item
- Change the Pricing
- Change Account Assignment
- Change Delivery Information
- Cancel a PO
- Check for Existing Goods Receipt
Use this job aid to add items to a Low Dollar Value Purchase order that was auto-created from a Shopping Cart. The status of the Purchase Order must be "Ordered."

1. Click the **Procurement/Contracts** tab:

2. Click the **Process Transaction** sub-tab:

3. Click the **Manage Purchase Orders** link:
4. Search for the Purchase Order using the Quick Criteria Maintenance. Click **Show Quick Criteria Maintenance** to expand the search filters:

**NOTE:** You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button. Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.
5. Results will appear in the table space below the Quick Criteria Maintenance. Click the Purchase Order number link to display:

6. Once the Purchase Order displays, click the **Edit** button to unlock the Purchase Order for updates:

7. Complete the required fields for each item that is added to the Purchase Order:

   Description > Product Category > Quantity > Unit > Gross Price > Delivery Date

   **Note:** Users may freely enter text directly into each required field as they would an Excel spreadsheet.

8. After entering required information for all lines added, click the **Check** button to validate entries.

   The system will generate errors, prompting users to enter funding information for all new lines added to the Purchase Order.
9. Click the **Details** button below Item Overview to display the detail tabs for the line added:

![Details button](image)

10. Click the **Account Assignment** tab, then click the **Details** button under the Account Assignment tab:

![Account Assignment tab](image)

11. Enter the Account Assignment funding information:

   Cost Center > Functional Area > Fund

![Account Assignment details](image)

12. Click the **Check** button to validate entries. If necessary, correct any errors.

![Check button](image)

13. Click the Details button to access the Notes and Attachments tab.
14. Select the **Supplier Text** category and enter the reason for the change/modification to the Purchase Order.

Proceed to Step 15 if you prefer the changed version of the Purchase Order sent to your e-mail address instead of the vendor’s. Otherwise, skip to Step 17 to complete the transaction and have the modified Purchase Order sent directly to the vendor.

15. Click on the **Header** tab and then click the Output sub-tab.
16. Change the existing vendor e-mail address to your e-mail address.

Note: Changing the email address is temporary and will only apply to this transaction. The email address will revert to the original once this transaction is complete.

Once you receive the Purchase Order via e-mail, you are required to forward the modified Purchase Order to the vendor.

17. After making updates, click the **Check** button to validate data then click the **Order** button to submit the modified Purchase Order for approval.
Use this job aid to delete line items in a Purchase order. Please note that any Goods Receipts or invoices posted against the Purchase Order must first be cancelled before proceeding with the modification.

1. Click the **Procurement/Contracts** tab:

2. Click the **Process Transactions** sub-tab:

3. Click the **Manage Purchase Orders** link:
4. Search for the Purchase Order using the Quick Criteria Maintenance. Click **Show Quick Criteria Maintenance** to expand the search filters:

**NOTE**: You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button. Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.
5. Results will appear in the table space below the Quick Criteria Maintenance. Click the Purchase Order number link to display:

![Image of Purchase Orders - All page]

6. Once the Purchase Order displays, click the **Edit** button to unlock the Purchase Order for updates:

![Image of Display Purchase Order: 450009604]

Click the grey box next to the line item that is to be deleted so that it is highlighted, then click the **Delete** button. **NOTE:** Prior to deleting, check if there are any Goods Receipts or invoices created for the line being deleted. If any of those documents exists, they need to be cancelled prior to deleting the PO line. **How to Check for Goods Receipts** <waiting for job aid approval>
The line item that you deleted will display an “X” in the Deleted column.

7. After deleting items on the Purchase Order, click the Details button to access the Notes and Attachments tab.

8. Select the **Supplier Text** category and enter the reason for the change/modification to the Purchase Order.

   ![Suppliers.png](image)

   **Add Supplier Text**

   Supplier Text: Sample text:
   
   - Deleted line 3 (Baseball Bats). No longer needed.

   Click the OK button.
Proceed to Step 9 if you prefer the changed version of the Purchase Order sent to your e-mail address instead of the vendor’s. Otherwise, skip to Step 11 to complete the transaction and have the modified Purchase Order sent directly to the vendor.

9. Click on the **Header** tab and then click the Output sub-tab.

10. Change the existing vendor e-mail address to your e-mail address.

    ![Change Purchase Order:4500009601](image)

    Note: Changing the email address is temporary and will only apply to this transaction. The email address will revert to the original once this transaction is complete.

    Once you receive the Purchase Order via e-mail, you are required to forward the modified Purchase Order to the vendor.

11. After making updates, click the **Check** button to validate data then click the **Order** button to submit the modified Purchase Order. The Purchase Order modification will workflow to Approver to be approved. Check the Approval Tab to view the approver(s).

    ![Change Purchase Order:4500009687](image)

    ![Display Purchase Order:4500009687](image)
The following steps will guide you in decreasing/increasing the quantity of an automatically generated Purchase Order. Please note that any decrease modification to a Purchase Order requires that any existing Goods Receipts or Invoices first be cancelled.

1. Click the “Procurement/Contracts” tab

2. Click the “Process Transactions” link

3. Click “Show Quick Criteria Maintenance”
4. You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button.

Note: Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.

5. Click the PO number hyperlink to open the PO.

6. Click the “Edit” button.
7. Locate the Quantity cell and increase/decrease to the desired quantity.

Note: Modifications may trigger workflow and the PO will be emailed to the vendor after it has been approved.

8. Click “Check” and look for any possible errors. If no errors are present, click “Order.”

9. Click the “Close” button once the PO modification is awaiting approval.
The following steps will guide you in changing the quantity of an automatically generated PO:

1. Click on the “Procurement/Contracts” Tab

2. Click “Process Transactions”

3. Click “Manage Purchase Order”

4. Click “Show Quick Criteria Maintenance”
5. You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button.

Note: Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.

6. Click on PO number hyperlink to open the PO.

7. Click on the “Edit” button.
8. Find the **Gross Price** cell and change to the desired amount.

![Gross Price Image]

9. Click on “Check” and look for any possible errors. If no errors are present, click on “Order”

![Check Image]

10. Click on “Close” once the PO modification is awaiting approval.

![Close Image]
Use this job aid to Change the Account Assignment on a Purchase Order that was auto-created from a Shopping Cart. The status of the Purchase Order must be “Ordered.”

1. Click the **Procurement/Contracts** tab:

2. Click the **Process Transaction** sub-tab:

3. Click the **Manage Purchase Orders** link:
4. Search for the Purchase Order using the Quick Criteria Maintenance. Click **Show Quick Criteria Maintenance** to expand the search filters:

**NOTE:** You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button. Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.

Enter the Purchase order number in the **Number** field, then click the **Apply** button.
5. Results will appear in the table space below the Quick Criteria Maintenance. Click the **Purchase Order Number** link to display:

![Table with Purchase Order Number](image1)

6. Once the Purchase Order displays, click the **Edit** button to unlock the Purchase Order for updates:

![Purchase Order Edit](image2)

7. To begin changing the Account Assignment, click on the **Details** button for the line item.

**Please Note:** Check for existing Goods Receipts and Invoices prior to changing the Account Assignment. Only PO lines that do not have a Goods Receipt may be changed.

![Item Details](image3)

8. Click on the **Account Assignment** tab.
9. Click on the **Details** button for that Account Assignment.

10. Remove all the information from the following fields:
    - Grant
    - Controlling Area
    - General Ledger Account
    - Fund
    - Commitment Item
11. Enter the new Account Assignment in the **Functional Area** field, then click on the **Check** button.

12. An error will appear at the Header level regarding the G/L account.
13. Enter the correct G/L account being utilized in the **General Ledger** Account field box. Then click on the **Check** button.

14. Click the **Details** button to access the Notes and Attachments tab.

15. Select the **Supplier Text** category and enter the reason for the change/modification to the Purchase Order.
16. Click on the **Order** button.

17. The modified Purchase Order has been sent to Site Administrator for approval.
Use this job aid to Change the delivery date and address/location to a Purchase order that was created from a Shopping Cart. The status of the Purchase Order must be “Ordered.”

1. Click the **Procurement/Contracts** tab:

2. Click the **Process Transaction** sub-tab:

3. Click the **Manage Purchase Orders** link:
4. Search for the Purchase Order using the Quick Criteria Maintenance. Click **Show Quick Criteria Maintenance** to expand the search filters:

**NOTE:** You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button. Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.

Enter the Purchase order number in the **Number** field, then click the **Apply** button.
5. Results will appear in the table space below the Quick Criteria Maintenance. Click the **Purchase Order Number** link to display:

![Purchase Order Number](image1)

6. Once the Purchase Order displays, click the **Edit** button to unlock the Purchase Order for updates:

![Display Purchase Order: 450000](image2)

7. To change the Delivery Address/Location click on the cascading sheets in the Ship-To Address box:

![Ship-To Address](image3)
8. Enter the location code then click the **Start Search** button.

- Street: 
- Building Code: 2781
- Floor: 
- Room Number: 
- Country Key: 
- Region: 
- Restrict Number of Value List Entries To 500

![Start Search button](image)

9. Select the correct school by double clicking on any area of that line. The correct school will now be updated in the Purchase Order.

<table>
<thead>
<tr>
<th>Name of Org.</th>
<th>Country</th>
<th>Postal Code</th>
<th>City</th>
<th>Street</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAUSD Code</td>
<td>US</td>
<td>91331</td>
<td>ARLETA</td>
<td>CANTE</td>
</tr>
<tr>
<td>LAUSD Code</td>
<td>US</td>
<td>91331</td>
<td>ARLETA</td>
<td>CANTE</td>
</tr>
</tbody>
</table>

**Note:** The **Ship-To Address** LAUSD Code (104) will not change**
10. To change the Delivery Date, click on the Delivery Date field under the Item Overview of the line item. You can either enter the correct date or use the built in calendar.

![Delivery Date Field](image)

11. Enter a text in the **Note to Supplier** field box.

![Note to Supplier Field](image)

12. After making updates, click the **Check** button to validate data then click the **Order** button to submit the modified Purchase Order to Site Administrator for approval. *Note: All modifications to Purchases Orders must be approved by Site Administrator.*

![Purchase Order Details](image)
The following steps provide instructions on how to cancel a Purchase Order.

1. Click on the **Procurement/Contracts** tab

![Procurement/Contracts tab](image1)

2. Click on the **Process Transactions** link

![Process Transactions link](image2)

3. Click on the **Manage Purchase Order** link

![Manage Purchase Order link](image3)
4. Click on the **Show Quick Criteria Maintenance** button.

5. You have the option to search for a PO through different filter options. For example, you can choose to enter the PO number and click the **Apply** button. Note: Before searching for a PO, clear any values from previous searches by clicking the **Clear** button.

6. Click on the Purchase Order Number link to open the PO.
7. Click on the **Edit** button.

8. Click on the **Cancel** button if you want to cancel the entire Purchase Order. NOTE: Prior to cancelling, check if there are any Goods Receipts or invoices posted for the Purchase Order. If there are, they need to be cancelled prior to proceeding with the cancellation of the PO.

9. Verify the cancellation of the entire PO by clicking the “**OK**” button.
10. Verify that the Purchase order was cancelled and that a red “X” is marked in the column labeled “Deleted.”

NOTE: The Purchase order status will change to “Awaiting Approval” if the purchase order requires approval. The Approver must now approve the cancellation.

11. The final step is to click on the Close button.
Check for Goods Receipts/Invoices

Use this job aid to check for existing Goods Receipts. For certain types of Purchase Order modifications (e.g., decreasing quantity, deleting items, etc.), any existing Goods Receipts or Invoices must first be cancelled before modification of Purchase Order.

1. Click the **Procurement/Contracts** tab:

   ![Procurement/Contracts Tab](image)

   SAP is not supported by Internet Explorer 10 (IE 10). Downloading a Citrix client will enable SAP with IE 10. Please go to [trp.askitd.net](http://trp.askitd.net) for instructions on how to download.

   **Upcoming Time Entry Cut-Off Dates**

2. Click the **Process Transactions** sub-tab:

   ![Process Transactions Sub-tab](image)

3. Click the **Manage Purchase Orders** link:

   ![Manage Purchase Orders Link](image)
4. Search for the Purchase Order using the Quick Criteria Maintenance. Click **Show Quick Criteria Maintenance** to expand the search filters:

**NOTE:** You have the option to search for PO through different filter options. For example, you can choose to enter the PO number and click the “Apply” button. Before searching for a PO, clear any values from previous searches by clicking the “Clear” button.
5. Results will appear in the table space below the Quick Criteria Maintenance. Click the Purchase Order number link to display:

<table>
<thead>
<tr>
<th>Purchase Order Number</th>
<th>Purchase Order Name</th>
<th>Status</th>
<th>Item Number</th>
<th>Item Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>495000057764</td>
<td>Athletic Equipment for Baseball League</td>
<td>Ordered</td>
<td>1</td>
<td>Outdoor Batting Cage Frame</td>
</tr>
<tr>
<td></td>
<td>Athletic Equipment for Baseball League</td>
<td>Ordered</td>
<td>2</td>
<td>Outdoor Batting Cage Net</td>
</tr>
<tr>
<td></td>
<td>Athletic Equipment for Baseball League</td>
<td>Ordered</td>
<td>3</td>
<td>Baseball Bats, Aluminum</td>
</tr>
<tr>
<td></td>
<td>Athletic Equipment for Baseball League</td>
<td>Ordered</td>
<td>4</td>
<td>Grid Bottom Base Set</td>
</tr>
<tr>
<td></td>
<td>Athletic Equipment for Baseball League</td>
<td>Ordered</td>
<td>5</td>
<td>Shipping Charge</td>
</tr>
</tbody>
</table>

6. Once the Purchase Order displays, click the **Header** tab, then click **Extended PO History** sub tab to view any existing Goods Receipts and Invoices.