## Change Purchase Order Overview

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through the **Create Change Order** task. The needed changes may consist of such areas as quantity, cost, Worktags, etc. By the end of this QRG, you will be able to make edits to the existing purchase orders you have placed, as and when required.

Procedure

On the Workday **Home** screen:

Access Method 1

1. Type **Create Change Order** in the search field.
2. Select **Create Change Order** task from the Search Results.
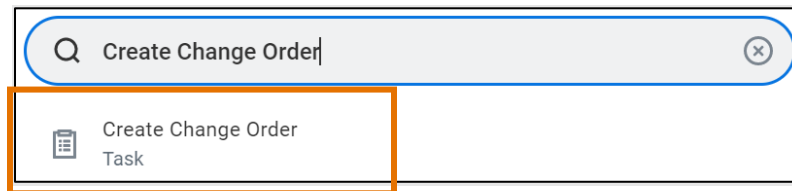
On the **Create Change Order** screen:

3. Enter and Select the **Purchase Order** that you want to change in the **Purchase Order to Change** field.
4. Select **OK** to proceed.

OR

Access Method 2

1. Type **Find Purchase Orders** into the search field. Click **Enter.**
2. Enter your search criteria. Click **OK**
3. On the Find Purchase Orders screen, hover over the magnifying glass in the Purchase Order column next to the appropriate Purchase Order number. Click on the **3 dots.**
4. Under Actions, hover over Purchase Order. Click on the **Create Change Order.**

NOTE	Anyone can change any purchase order. However, if you change a purchase order in which you are not the buyer, the buyer of the purchase order must review and approve the change.

On the second **Create Change Order** screen:

5. Select the reason for changing the purchase order in the **Reason** field from the list of options. This is not a required field, but it is <u>highly recommended</u> as it will help the approvers know what has changed.

6. Type your comments in the **Comments** field. This is not a required field, but it is highly recommended as it will help the approvers know more details about the reasons for the change.
7. All other information on the screen under each section and tab auto-populates from the purchase order selected in Step 3. Edit information as needed to change the purchase order.
8. **To Change Header Information**
    a. Purchase order header information can be seen, and revised as needed, under the Summary, Terms and Taxes, and Contact Information sections.
    b. Select the check box to apply the Header changes you made to all **Goods Lines** and **Service Lines** at the bottom of the page.

Apply header changes to all lines on Save or Submit ☐

9. **To Change Quantity, Cost, Delivery and Shipping Information, or Worktag Information**
    c. From the Goods Lines tab and/or the Service Lines tab, make the appropriate changes to each line

NOTE	You cannot make changes to worktag information on lines that have already been invoiced. Updating worktag information on already invoiced lines must be done through an Accounting Adjustment after the invoice has been paid.
NOTE	If the PO was created in a previous fiscal year, it is highly suggested that changes are done by adding a new line rather than adjusting an existing line. Adjusting an existing line to a PO that was created in a previous fiscal year could potentially cause complications in the obligations and commitments.

10. **To Add or Cancel a Line**
    d. To add a line, click the (+) button in the top row, and then fill in the appropriate information. If you wish to remove this new line prior to saving, click the (-) button next to the line.
    e. To cancel an existing line, click the box in the Cancel PO Line column next to the appropriate line.

NOTE	Optionally, edit the details in the **Tax, Retention Items** and **Prepaid details** tabs as needed and attach relevant documents as needed in the **Attachments** tab.
NOTE	Do **NOT** use the Save for Later button. You will **NOT** be able to access a saved change order. Please complete the Change Order in one session. If saved, central finance will either have to delete or complete the change for you.

11. Select **Submit** to submit the change order.

NOTE	Change Orders are <u>not</u> redistributed to the supplier. If the change is such that the supplier needs to be informed, the revised purchase order must be manually sent to the supplier.

You have successfully completed this task. It will now be routed based on the configuration.