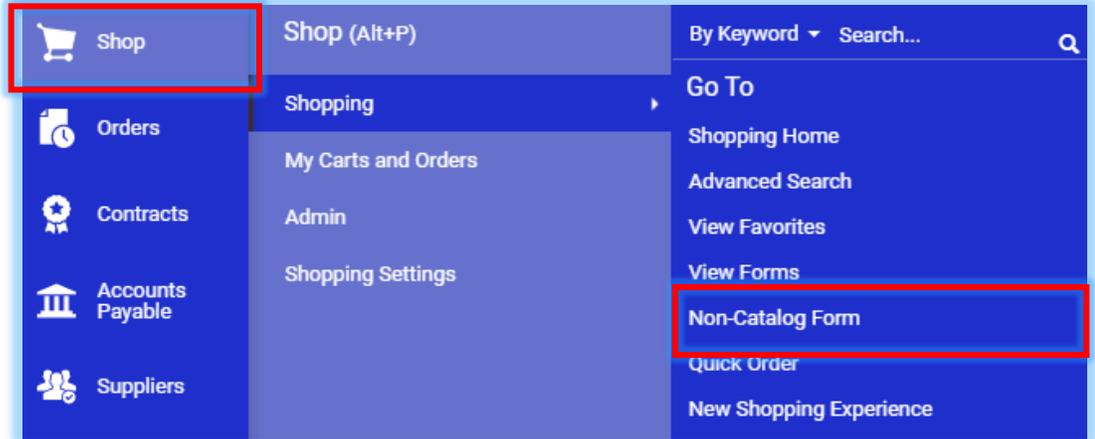


E-Procurement System Tutorial: Change Order Process

Adding a Line Item

1. Sign into E-Procurement by accessing the system through the Pace Portal under the Staff tab.

2. Open a Non-Catalog form

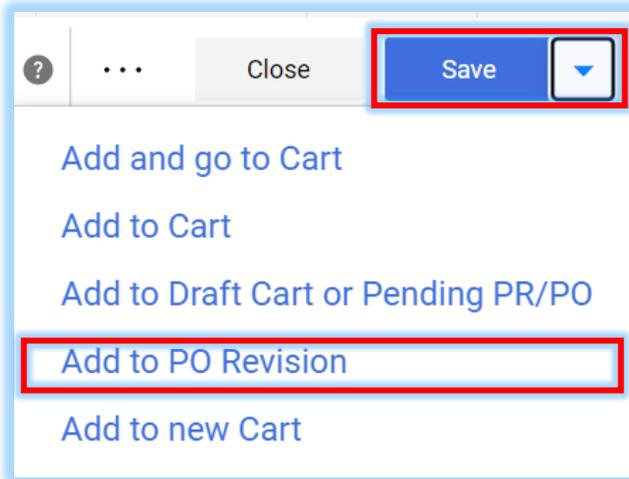


3. Complete Non-Catalog form.

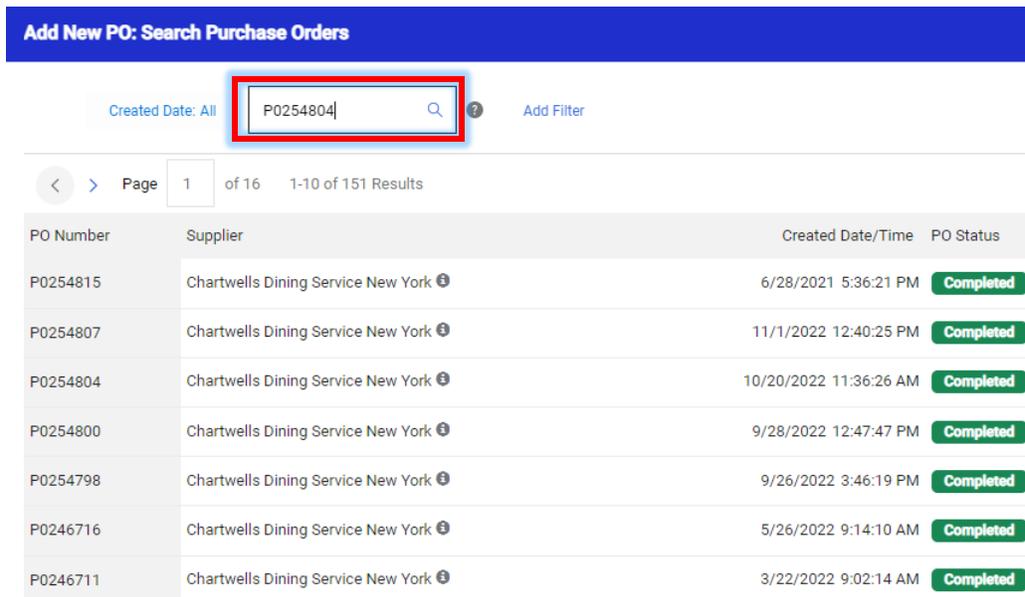
The screenshot shows the 'Form - Non-Catalog Form' page in the E-Procurement Marketplace. The page is divided into several sections:

- Existing Supplier:** Includes a search bar for 'Choose Supplier: *' with 'Chartwells Dining Service New York' selected. Below it is the 'BU Business Address 1' with details: '303 Crossroads Park Drive, Westbury, New York 11797 United States'. The 'Supplier (Vendor) Phone' is '+1 516-364-2300'.
- Distribution Method *:** Includes a checkbox for 'Check this box to customize order distribution information.' and a 'Fax' field with '+1 914-989-8026'.
- General Info:** Includes a section for 'Non-Configurable Fields'.
- Request Type *:** Set to 'Non-Catalog Form'.
- Item Name/No. *:** Set to 'TEST'.

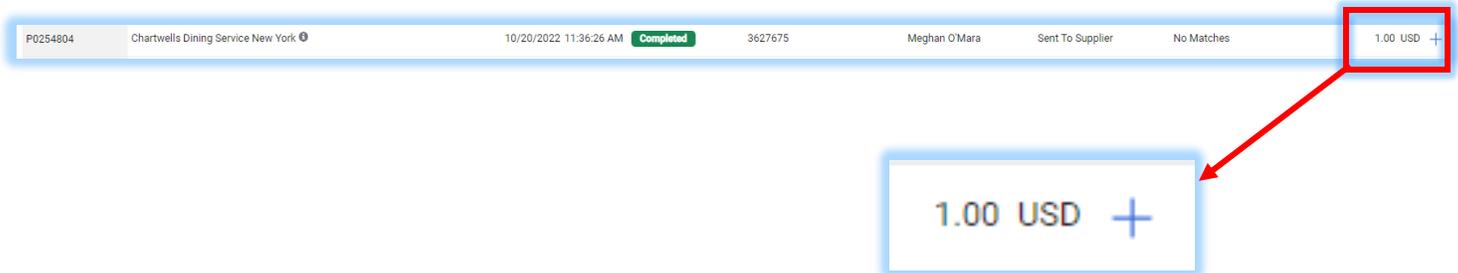
4. Click the **Save** drop down menu in the Non-Catalog form and select **Add to PO Revision** and click **Go**.



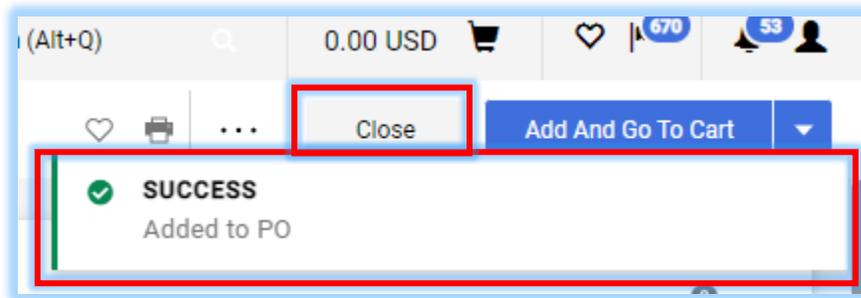
5. Enter the PO # for which you are creating a change order and click the Magnifying glass to search.



6. Your PO# is shown, click the blue plus (+) sign to the right.



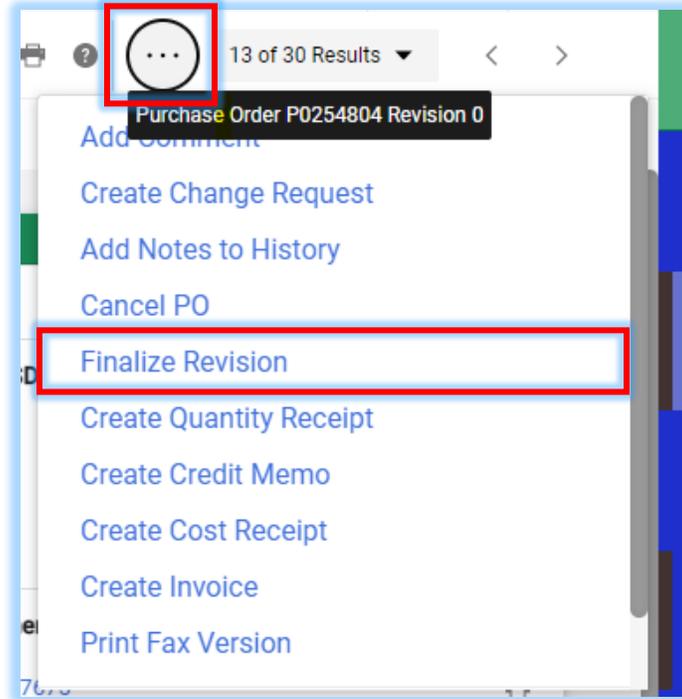
7. You will get a message saying "Success Added to PO" in the upper right. Click the "Close" button to close the form.



8. **This is STEP ONE completed**, now open your PO in E-Procurement by clicking on the Order icon and searching for the PO number in the search bar. On the PO, scroll down to the bottom and you should see your new line added.

| Status | Item | Catalog No. | Unit Price | Quantity | Ext. Price | |
|-----------------|-------------------|-----------------------|--------------------------|------------------------------------------------------|------------|-------|
| 1 | ✓ Test for LDI #2 | Breakfast for Meeting | 150.00 | Qty: 4 EA | 600.00 | ... □ |
| ^ ITEM DETAILS | | | | | | |
| Contract: | | no value | Requisition Number | 2990458 view print | | |
| Taxable | | ✗ | External Note | no value | | |
| Capital Expense | | ✗ | Attachments for supplier | Add | | |
| Commodity Code | | no value | | | | |
| 2 | ✓ This is a test. | TEST of Revision | 200.00 | Qty: 1 EA | 200.00 | ... □ |
| ^ ITEM DETAILS | | | | | | |
| Contract: | | no value | External Note | no value | | |
| Taxable | | ✗ | Attachments for supplier | Add | | |
| Capital Expense | | ✗ | | | | |
| Commodity Code | | no value | | | | |

9. **STEP TWO:** Click the **menu (the '...' in the upper right of the form)** and select **Finalize Revision**. Follow the prompts to place the revision in the approval workflow to complete the process.



10. Enter a **Comment** as to why the Purchase Order was revised* and click **Save**.

***PLEASE NOTE:** If you want the supplier to receive the modified PO, leave the Distribute PO box checked. Uncheck the box if you do not want the supplier to receive the modified PO.

A screenshot of the 'Route PO To Workflow' dialog box. The dialog has a blue header with the title 'Route PO To Workflow' and a close button. Below the header is a note: 'NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' The PO No. is P0238889. There is a text area for 'Specify a reason for revision' containing the text 'This is a test change order for training.' Below the text area is a character count: '959 characters remaining'. The 'Distribute PO' checkbox is checked with a green checkmark. At the bottom right are 'Save' and 'Close' buttons.

The process has been completed.