

E-Procurement System Tutorial: Change Order Process

Price decrease to close out a PO that has had payment made to the vendor. This will return the balance to the budget line.

1. Sign into E-Procurement by accessing the system through the Pace Portal under the Staff tab.
2. Search for the Purchase Order you would like to make the change to by clicking on the Orders icon and entering the PO# in the Search OR select Purchase Orders from the menu to view a list of all your PO's.



The Purchase Order will display in the results.

3. Click on the linked PO Number to open the order.

Type of Order: All Created Date: All P0254809					
1-2 of 2 Results					
<input type="checkbox"/>	Order Identifier	Type	Order Status	Order Owners	Created Date/Time
<input type="checkbox"/>	3629408	Requisition	Complete	Marji Nelson	10/20/2022 10:07:56 AM
<input type="checkbox"/>	P0254809	Purchase Order	Complete	Marji Nelson	11/1/2022 1:11:40 PM

4. On the Summary tab, scroll down to the bottom of the PO to view the Line Item details. Once there, click on the linked Item name to open the Non-Catalog form.

1 Item						
Status	Item	Catalog No.	Unit Price	Quantity	Ext. Price	
✓	Test for LDI #2	Breakfast for Meeting	150.00	Qty: 3 EA	450.00	...
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					

5. In the Non-Catalog form, adjust either the **Quantity** (decrease to actual amount received) or **Estimated Price** (decrease to what has actually been paid. Refer to the **INVOICE** tab to see what has been paid out).

PLEASE NOTE: there must always be a value in the Quantity field, it cannot be "0."

Quantity *	2
Packaging	EA - Each
Estimated Price *	10

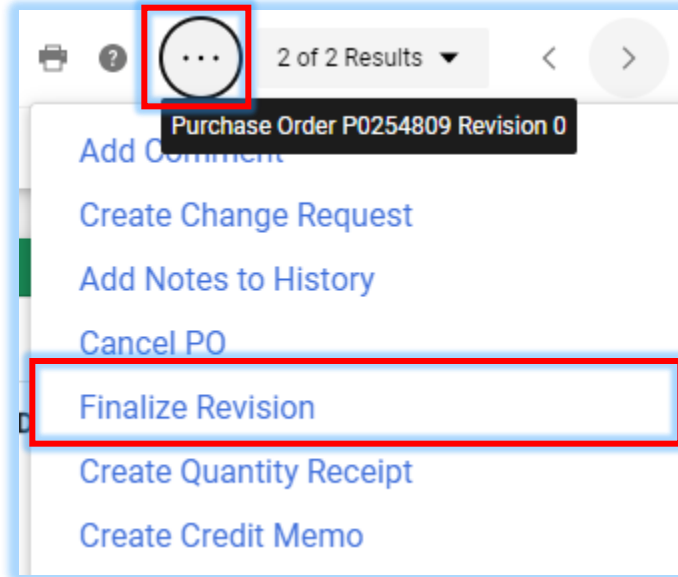
6. Click on Save in the upper right corner and then click on Close to return to the PO.

0.00 USD					
...	Close	Save	▼		

7. Notice the Quantity and Price Change in the PO and in the Total within the **Completed** section on the right side of the PO view (**PLEASE NOTE:** this **Total** is the sum of all line items in this order).

Completed	
Details	>
Total (70.00 USD)	▼
Subtotal	70.00
	70.00

8. Click the **menu (the '...' in the upper right of the form)** and select **Finalize Revision**.



9. Enter a **Comment** as to why the Purchase Oder 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 a dialog box titled "Route PO To Workflow". The dialog box has a blue header with a close button (X). Below the header, there is a note: "NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action." Below the note, there is a field for "PO No." with the value "P0238889". Below that, there is a text area labeled "Specify a reason for revision" containing the text "This is a test change order for training." Below the text area, it says "959 characters remaining". Below the text area, there is a checkbox labeled "Distribute PO" which is checked with a green checkmark. At the bottom right of the dialog box, there are two buttons: "Save" (highlighted in blue) and "Close".

The Purchase Order is placed into workflow and reviewed by Purchasing.