

# E-Procurement System Tutorial: Change Order Process

## Removing a Line Item

1. Sign into E-Procurement by accessing the system through the Pace Portal under the Staff tab.
2. Search for the Purchase Order for which you are removing a line item from 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 P0254803 <span>?</span> Add Filter Clear All Filters <span>?</span>									
1-3 of 3 Results <span>20 Per Page</span>									
<input type="checkbox"/>	Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount	Account
<input type="checkbox"/>	<a href="#">3621859</a>	Requisition	Complete	Marji Nelson	10/12/2022 11:15:35 AM	10/12/2022 12:12:11 PM	Camp Deer Run	4.00 USD	E19602
<input type="checkbox"/>	<a href="#">P0254803</a>	Purchase Order	Complete	Marji Nelson	10/12/2022 12:12:11 PM	10/12/2022 12:13:05 PM	Camp Deer Run	0.00 USD	E19602

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						<input type="checkbox"/>
Status	Item	Catalog No.	Unit Price	Quantity	Ext. Price	
1	<div><div>✓</div><div>Test for LDI #2</div></div>	Breakfast for Meeting	150.00	Qty: 3 EA	450.00	... <input type="checkbox"/>
<div><div>^</div>ITEM DETAILS </div>						
Contract:	no value	Requisition Number	2990458 <a href="#">view</a>   <a href="#">print</a>			
Taxable	✗	External Note	no value			
Capital Expense	✗	Attachments for supplier	<a href="#">Add</a>			
Commodity Code	no value					

- Change the **Estimated Price** to "0" in the non-catalog form (**PLEASE NOTE**: there must always be a value in the Quantity field, it cannot be "0").

Quantity ★	<input type="text" value="1"/>
Packaging	EA - Each ▼
Estimated Price ★	<input type="text" value="0"/>

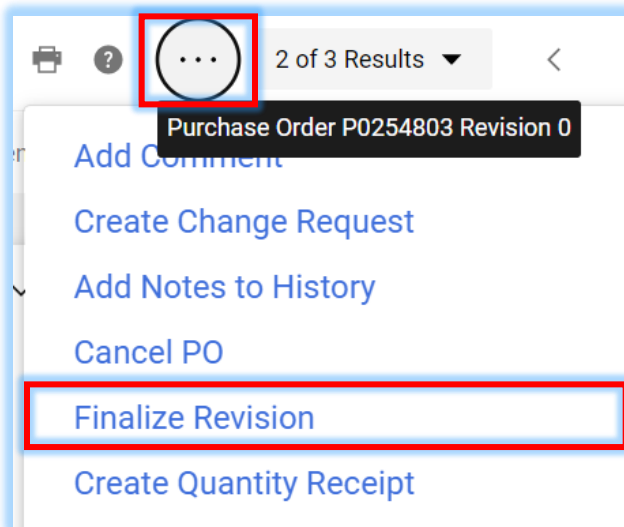
- Click on the **Save** button to save your changes and then the **Close** button to close out of the form and return to the PO summary page.

(Alt+Q)		0.00 USD			670		53	
			...	Close	Save	▼		
<div> <b>SUCCESS</b>            Form saved successfully         </div>								

7. Notice the Line Item in the Purchase Order is zeroed out.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	<a href="#">Test for LDI #2</a>	Breakfast for Meeti	EA	0.00	Qty: 4 EA	0.00	...
<div>ITEM DETAILS </div> <div><div>Contract:</div><div>no value</div><div>Requisition Number</div><div><a href="#">2990458</a> <a href="#">view</a>   <a href="#">print</a></div></div> <div><div>Taxable</div><div></div><div>External Note</div><div>no value</div></div> <div><div>Capital Expense</div><div></div><div>Attachments for supplier</div><div><a href="#">Add</a></div></div> <div><div>Commodity Code</div><div>no value</div></div>							
2	<a href="#">This is a test.</a>	TEST of Revision	EA	100.00	Qty: 1 EA	100.00	...
<div>ITEM DETAILS </div>							

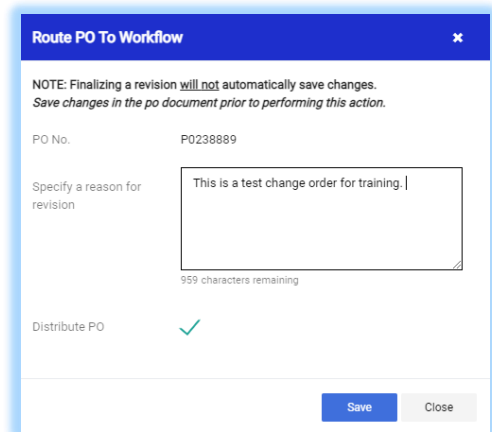
8. Click the **menu** (the ... in the upper right of the form) and select **Finalize Revision**. Follow the prompts to place the revision in the approval workflow to complete the process.



The screenshot shows a dropdown menu for 'Purchase Order P0254803 Revision 0'. The menu options are: 'Add Comment', 'Create Change Request', 'Add Notes to History', 'Cancel PO', 'Finalize Revision' (highlighted with a red box), and 'Create Quantity Receipt'. The menu is overlaid on a background showing '2 of 3 Results'.

9. 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.



The screenshot shows the 'Route PO To Workflow' dialog box. It contains 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 'P023889'. A text area for 'Specify a reason for revision' contains the text 'This is a test change order for training.' and shows '959 characters remaining'. At the bottom, there is a checkbox for 'Distribute PO' which is checked with a green checkmark. The dialog has 'Save' and 'Close' buttons at the bottom right.

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