

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									<input type="button" value="Search"/>	<input type="button" value="Help"/>	<input type="button" value="Add Filter ▾"/>	<input type="button" value="Clear All Filters"/>	<input type="button" value="Help"/>
1-3 of 3 Results											<input type="button" value="20 Per Page ▾"/>		
□	Order Identifier ▾	Type	Order Status	Order Owners	Created Date/Time ▾	Completed Date ▾	Supplier	Total Amount ▾	Account				
□	3621859	Requisition	Complete	Marji Nelson	10/12/2022 11:15:35 AM	10/12/2022 12:12:11 PM	Camp Deer Run 1	4.00 USD	E19602				
□	P0254803	Purchase Order	Complete	Marji Nelson	10/12/2022 12:12:11 PM	10/12/2022 12:13:05 PM	Camp Deer Run 1	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						
	Status	Item	Catalog No.	Unit Price	Quantity	Ext. Price
1	<input checked="" type="checkbox"/>	Test for LDI #2	Breakfast for Meeting	150.00	Qty: 3 EA	450.00
ITEM DETAILS Edit						
Contract:	<i>no value</i>		Requisition Number	2990458 view print		
Taxable	<input checked="" type="checkbox"/>		External Note	<i>no value</i>		
Capital Expense	<input checked="" type="checkbox"/>		Attachments for supplier	Add		
Commodity Code	<i>no value</i>					

5. 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 ★

Packaging

Estimated Price ★

6. 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) [Search](#) 0.00 USD [Cart](#) [Heart](#) [670](#) [53](#) [User](#)

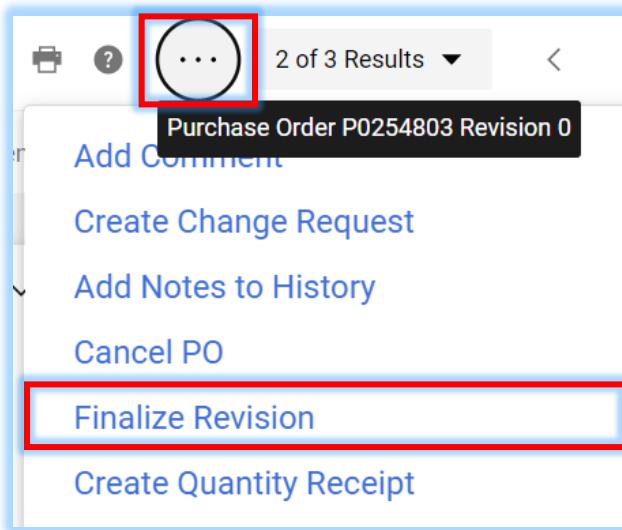
[Heart](#) [Print](#) [?](#) ... [Close](#) [Save](#) [▼](#)

SUCCESS
Form saved successfully

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

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

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.



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.

Route PO To Workflow

NOTE: Finalizing a revision **will not** automatically save changes. Save changes in the po document prior to performing this action.

PO No. P0238889

Specify a reason for revision

This is a test change order for training.

959 characters remaining

Distribute PO

Save **Close**

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