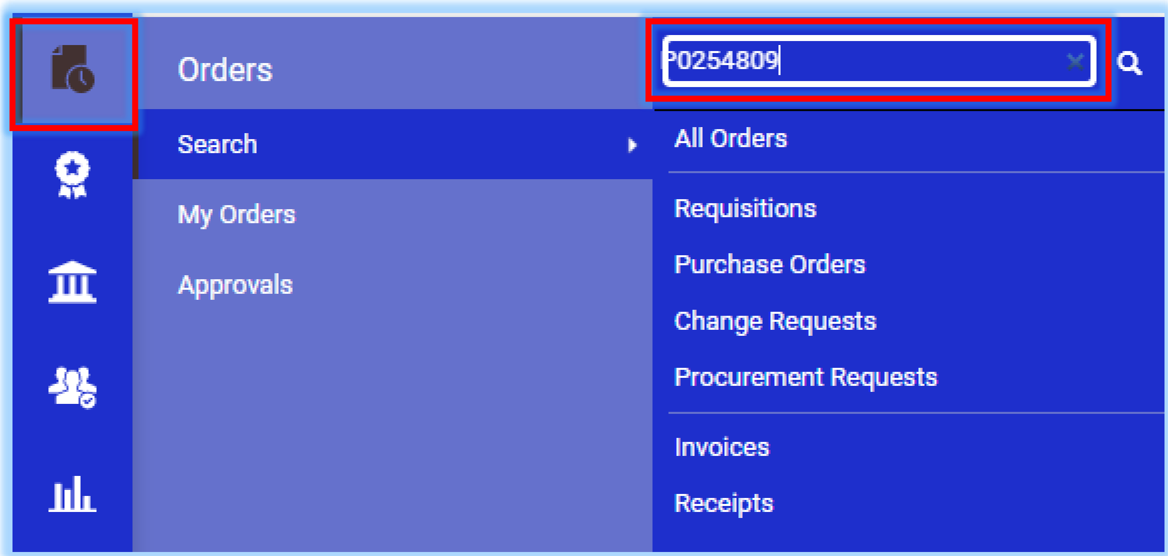
E-Procurement System Tutorial: Change Order Process

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

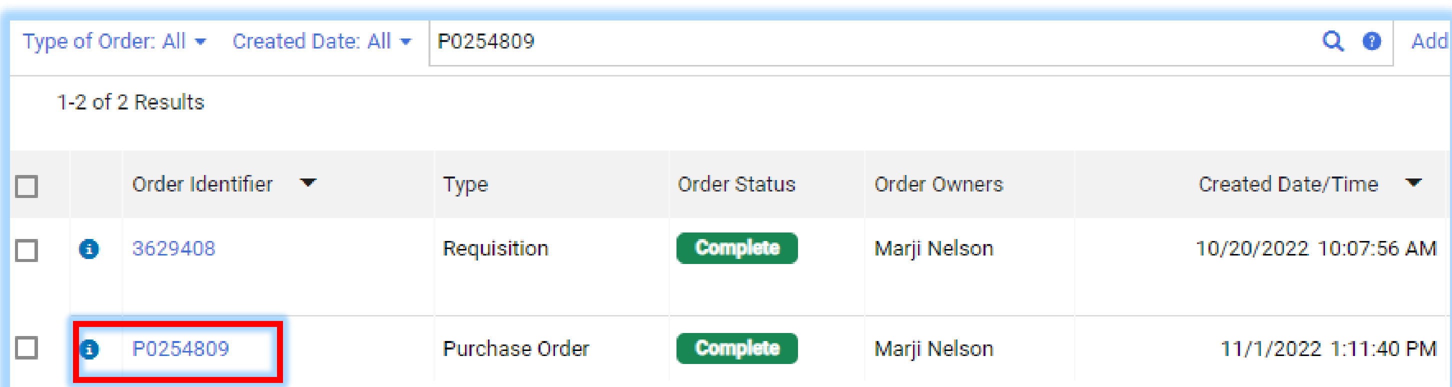
1. Sign into E-Procurement by accessing the system through the Pace Portal under the Staff tab.

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.

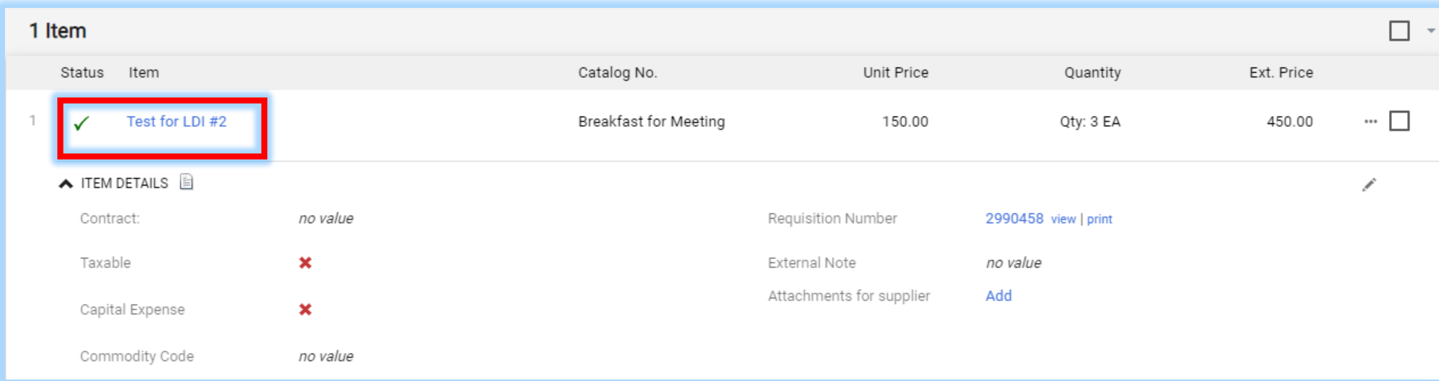


The Purchase Order will display in the results.

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

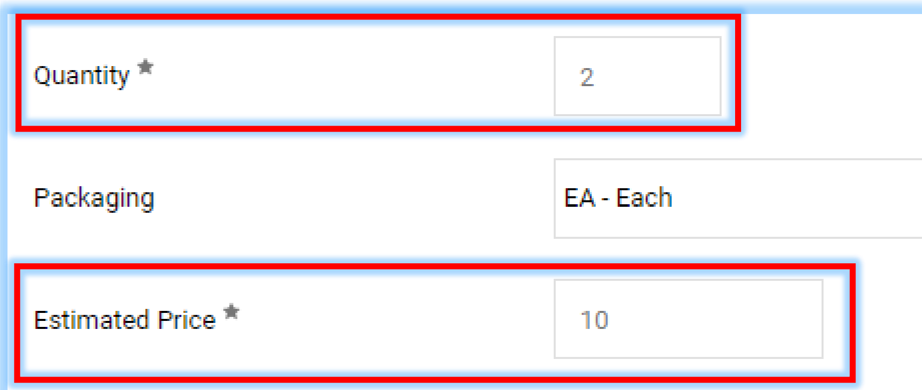


4. On the Summary tab, scroll down to the bottom of the PO to view the Line Item details. Once there, click on the linked Item name to open the Non-Catalog form.



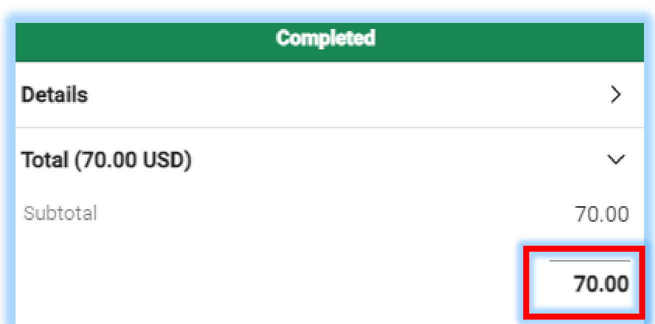
5. In the Non-Catalog form, adjust either the **Quantity** (decrease to actual amount received) or **Estimated Price** (decrease to what has actually been paid. Refer to the **Invoice** tab to see what has been paid out).

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

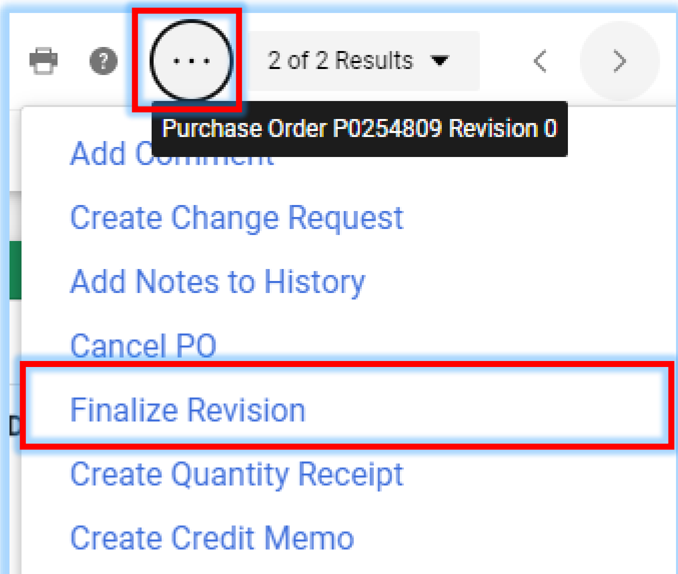


6. Click on Save in the upper right corner and then click on Close to return to the PO.

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 (**<u>PLEASE NOTE</u>**: this **Total** is the sum of all line items in this order).

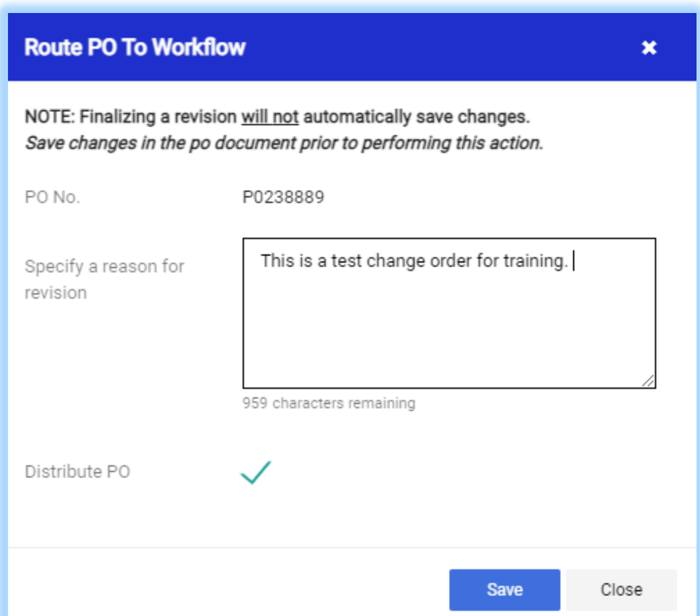


8. Click the **menu (the ⋯ in the upper right of the form)** and select **Finalize Revision**.



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.



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