

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						Q	?	Add
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

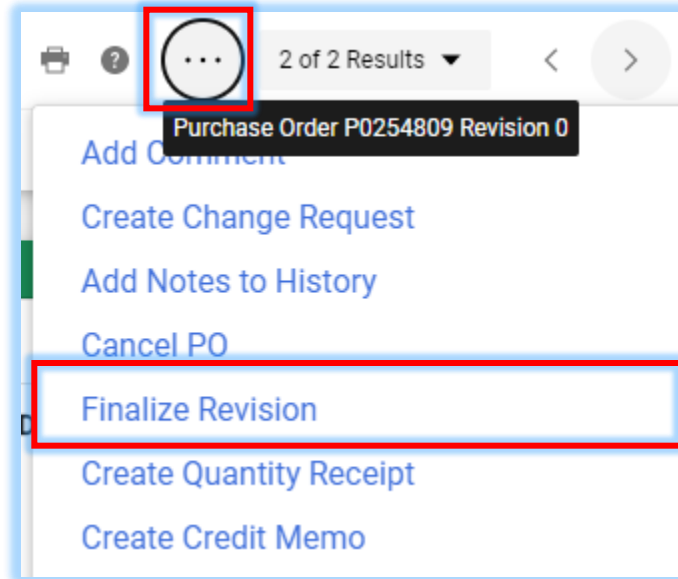
Details >

Total (70.00 USD) v

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 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 a 'Route PO To Workflow' dialog box. The dialog has a blue header with the title 'Route PO To Workflow' and 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.' The dialog contains two main sections. The first section is labeled 'PO No.' with the value 'P0238889'. Below this is a text area labeled 'Specify a reason for revision' containing the text 'This is a test change order for training.' and a character count '959 characters remaining'. The second section is labeled 'Distribute PO' with a green checkmark next to it. At the bottom right, there are two buttons: 'Save' (highlighted in blue) and 'Close' (greyed out).

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