Job Aid:
How to Make Changes to an Approved Purchase Order

This Job Aid shows how to:

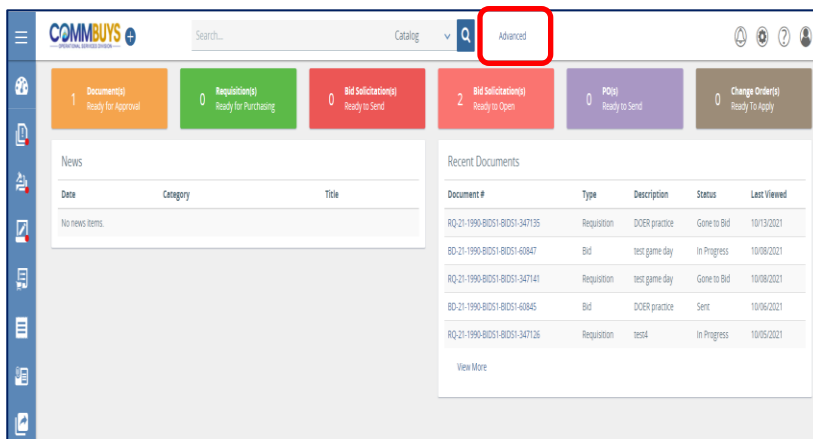- Make changes to a Purchase Order (also known as a Change Order) in COMMBUYS.

Of Special Note:

- A change order is a way of making changes or updating an approved purchase order (PO) including a Master Blanket Purchase Order (MBPO). Change orders are only allowed after a PO has completed its entire approval path. The only people able to make changes to the PO are the original purchaser, their Basic Purchaser (BP) supervisor or the Department Access (DA) super user. All revisions to the PO are subject to the same approvals. Changes can be made to the General and Items tabs. Changes to a PO appear on the Summary page.

    NOTE: Change Orders are not allowed on Government-to-Business (G2B) Punchout orders.
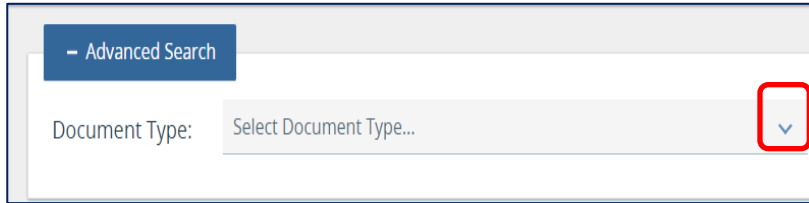
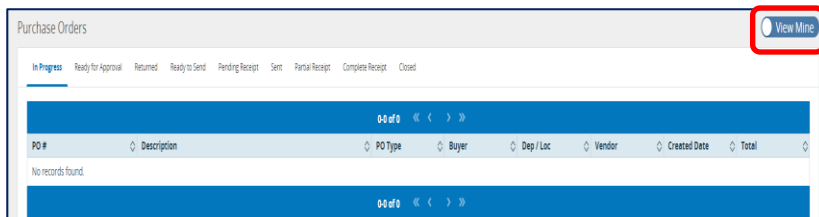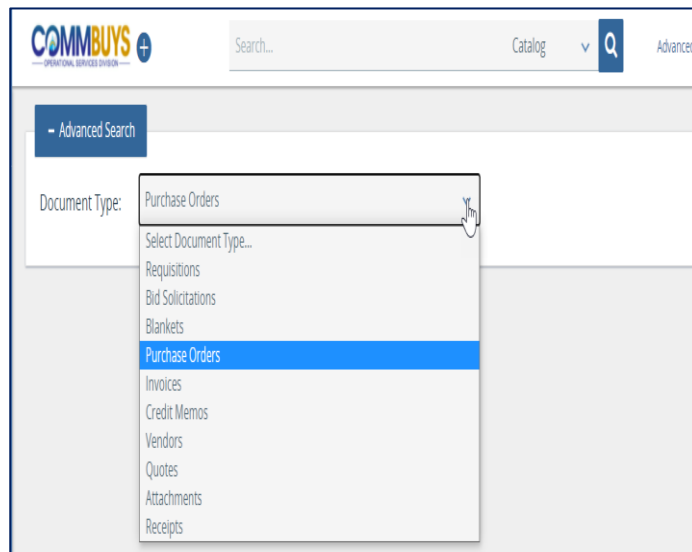| Screenshot	Directions
	Step 1: Clicking on the Advanced Search Hyperlink Upon successful login, click on the blue **Advanced** hyperlink next to the magnifying glass icon.

Screenshot	Directions

Step 2: Clicking on the Search Dropdown Arrow

Click on the dropdown arrow next to the **Select Document Type** field.

NOTE: An alternative way to search for POs that you created is using the icon bar on the left side of the page. Your POs can be found by clicking on the Purchase Orders icon. Then choose the status that you want (for example, **Ready to Send** or **Sent**), along the top of your results page. It automatically defaults to "View Mine" in the upper right. If you use this alternate way, you can skip to Step 5.

Step 3: Selecting a Document Type

From the dropdown menu, select the desired document type. For example, select **Purchase Orders** for ordinary POs or select **Blankets** for a Statewide or Departmental Contract (Master Blanket Purchase Order).

Screenshot	Directions

Step 4: Searching for a Document

The page refreshes to display the search fields. Enter search criteria to locate the PO that requires a change order and click on the **Search** button.

NOTE: A PO must be in **Ready to Send** or **Sent** status before a change order can be created against the PO. Ensure that either of these choices are selected in the **Status** field.

Step 5: Selecting the Document

The search returns a list of POs meeting the search criteria.

Click on the **blue hyperlinked PO number** to open the PO.

NOTE: A PO must be in **Ready to Send** or **Sent** status before a change order can be created against the PO. The status column can be sorted if you want to filter your results.

Screenshot	Directions

Step 6: Clicking on the Change Orders Tab

Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679

General   Items   Vendor   Routing   Control   Attachments(3)   Notes(1)   Change Orders   Reminders   **Summary**

The PO opens to the Summary tab. Click on the **Change Orders** tab.

Step 7: Clicking on the Create Change Order Button

Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679

General   Items   Vendor   Routing   Control   Attachments(3)   Notes(1)   Change Orders   Reminders   Summary

There are no change orders for this document.

Create Change Order

The **Change Orders** tab displays. Click on the **Create Change Order** button.

NOTE: If this order was a G2B Punchout order, you will not see this button since a change order is not allowed on this type of order.

Step 8: Selecting a Tab

Change Order (In Progress) - Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679   Status: 3PS - Sent

General   Items   Subcontractors   Distributors   Control   Attachments(3)   Summary   Back to PO

General

Sort by Column: Print Sequence ∨ ☐ Sort Descending   Go

Item #	Print Sequence		Item Description				Total Cost	Cancel ☐
		Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount
1	1.0	(46-16 - 16) water safety equipment - life vests, pool rings, pool ropes, and pool alarms.					$0.00	☐
		Quantity	1.0	$0.00	$0.00 Ea - Each		0.000	$0.00		$0.00
							Total	$0.00

ⓘ Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue   Search Inventory Items   Search Items   Add Item   Upload Items   Export Items

Copyright © 2021 Periscope Holdings, Inc. - All Rights Reserved.

The Change Order opens to the **Items** tab. Changes may be made on several tabs including the General tab.

To make changes to items you originally ordered, such as quantity, cost, or description, click on the blue Number in the Item # column to select the item that you want to modify.

Screenshot	Directions

Step 9: Making Changes

1. Make the necessary changes and click on the **Save & Continue** button.

2. Once all the changes are complete, click on the **Summary** tab.

Screenshot	Directions

Step 10: Completing the Summary Tab

The Summary tab provides a recap of the changes made to the PO. The top section of the screen allows you to enter a comment for the change order.

Change Order (In Progress) - Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679

General   Items   Subcontractors   Distributors   Control   Attachments(3)   Summary   **Back to PO**

Comment for the whole change order:

Header/Item Changes

Show 25 ∨ entries

Showing 1 to 1 of 1 entries

Modified Field	Item #	Description
Description	1	Description changed from "water safety equipment - life vests, pool rings, pool ropes, and pool alarms." to "water safety equipment."

Comment:

Show 25 ∨ entries

Showing 1 to 1 of 1 entries

Bilateral Change Order

☐ Bilateral Change Order Enabled (Approval by Vendor will be required)

Save & Continue   Submit for Approval   Delete Change Order

The **Header/Item Changes** section displays the modified field and a description of the item modification, when modified, and by whom.

If you would like the Vendor to approve the change order, select the **Bilateral Change Order Enabled** checkbox at the bottom left of the screen.

- To confirm the changes made on this page, click on the **Save & Continue** button.
- To stop the change to the entire purchase order, click on the **Delete Change Order** button.
- Change Orders require approval. To submit the change for approval, click on the **Submit for Approval** button.

The Summary tab re-displays confirming the change order is submitted for approval

Screenshot	Directions

Step 11: Applying the Change Order

Just like all other COMMBUYS documents, a change order may require approval. Once the change order has been approved, it will be in a **Ready to Send** status.

1. Locate your Purchase Order and click on the **Change Orders** tab.

2. Click on the **Apply/Delete Change Order** button at the bottom of the page.

3. When the Summary tab page displays, click on the **Apply Change Order** button.

The change order is now in **Sent** status.