

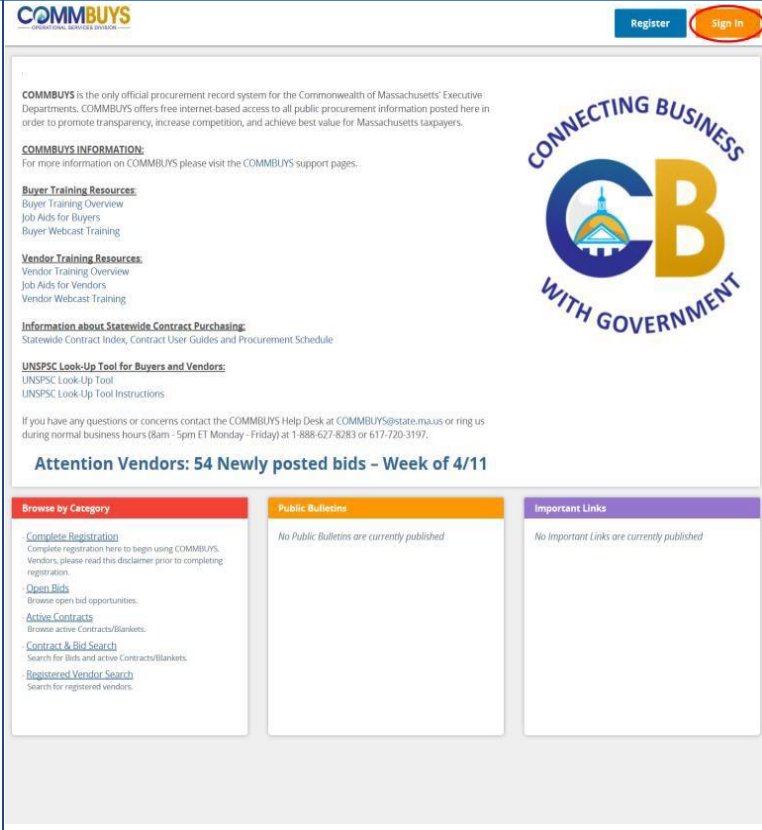
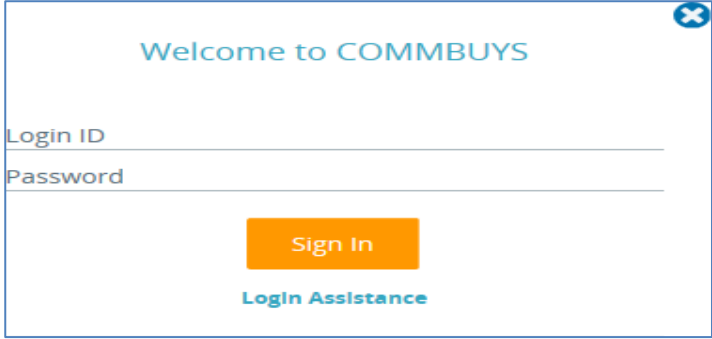
Job Aid: How to Make Changes to an Approved Purchase Order

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. **NOTE:** Changes to a PO appear on the Summary page.

Screenshot	Directions
	<h3>Step 1: Logging in to COMMBUYS</h3> <ol style="list-style-type: none"> 1. Launch the COMMBUYS website by entering the URL https://www.commbuys.com 2. Click on the orange Sign In button in the upper right hand corner. 3. Enter your Login ID and Password and click the Sign In button.
	

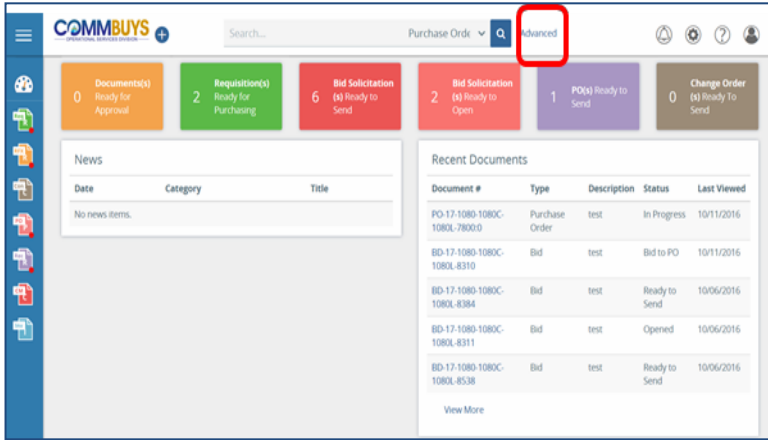


Job Aid:

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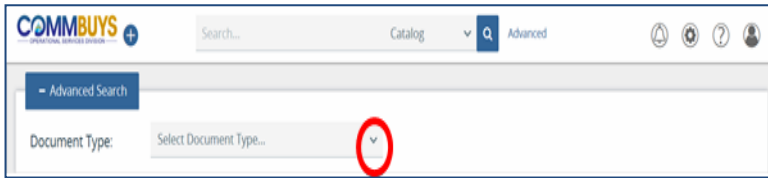
Screenshot

Directions



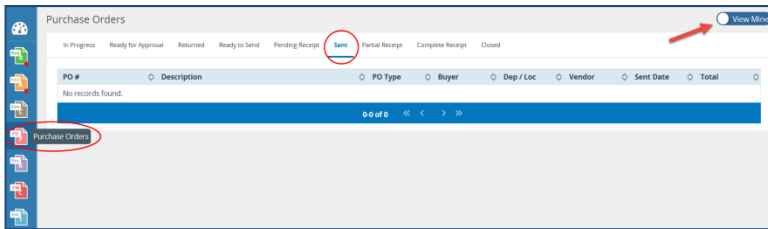
Step 2: Clicking on the Advanced Search Hyperlink

Upon successful login, click on the blue **Advanced** hyperlink next to the magnifying glass icon.

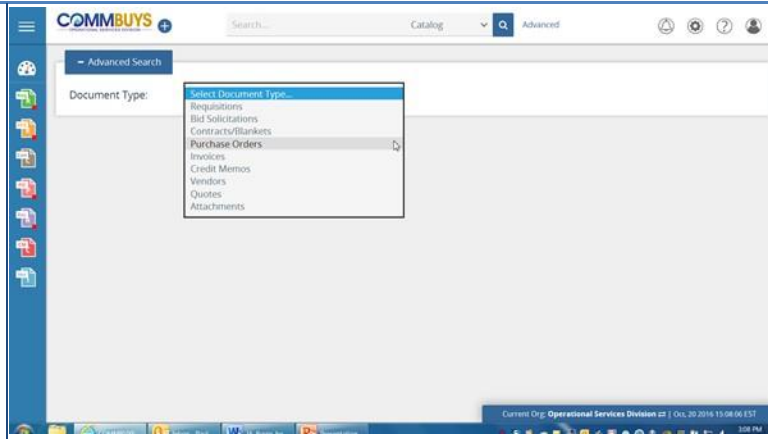


Step 3: Clicking on the Search Dropdown Arrow

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



NOTE: An alternative way to search for Purchaser Orders that you created is using the Icon Bar on the left side of the page. Your Purchase Orders can be found by clicking on the Pink Purchase Orders icon. You would then choose the status that you want 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 step7.



Step 4: Selecting a Document Type

From the dropdown menu, select the desired document type. For example, select **Purchase Order** for ordinary POs or select **Contracts/Blankets** for a Statewide Contract/Departmental MBPO.



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Screenshot

Advanced Search

Document Type: **Purchase Orders** Match Criteria: All

Purchase Order # _____ Purchase Order Release # _____ Alternate ID _____

Description _____ Purchase Order Type _____ Status _____
 Select Purchase Order Type... _____ Select Status... _____

Department _____ Location _____ Buyer _____
 Select Department... _____ Select Location... _____ Select Buyer... _____

Requestor _____ Vendor Name _____ Type Code _____
 Select Requestor... _____ Select Type Code... _____

Item Description _____ NIGP Class _____ NIGP Class Item _____
 Select NIGP Class... _____ Select NIGP Class Item... _____

Sent Date From _____ Sent Date To _____

Search Clear

Directions

Step 5: Searching for a Document

The page refreshes to display the search fields. You can now enter search criteria to locate the PO that requires a change order.

Enter search criteria and click on the **Search** button.

OSD07-OSD07-7813-4	10/21/2016	Iron Pich-SBP01Pilot	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Conversion Vendor	\$70,000.00	3PI - In Progress
PO-17-1080-OSD07-OSD07-7813-5	10/21/2016	SBP01Pilot test	Operational Services Division	OSD01/OSDEP	Zelpha Bennett	INNO4 LLC	\$50,000.00	3PS - Sent
PO-17-1080-OSD07-OSD07-7798	10/05/2016	Small Scale IT Professional Services / IT Small Business Incubator Contract SBP01	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Conversion Vendor	\$ 0.00	3PS - Sent
PO-17-1080-OSD07-OSD07-7798-1	10/05/2016	ZB_Small Scale IT Professional Services / IT Small Business Incubator Contract SBP01	Operational Services Division	OSD07/OSD07	Zelpha Bennett	Nantucket Technology	\$ 0.00	3PI - In Progress
PO-17-1080-OSD07-OSD07-7763	09/15/2016	GRO30	Operational Services Division	OSD07/OSD07	Zelpha Bennett	US Foods	\$ 0.00	3PS - Sent
PO-17-1080-OSD07-OSD07-7734	09/09/2016	Muni Construction via CB	Operational Services Division	OSD07/OSD07	Zelpha Bennett	CompuTrain	\$ 0.00	3PI - In Progress
PO-17-1080-OSD03-SRC02-7715	09/07/2016	09.07.16_Test_M B	Operational Services Division	OSD03/SRC02	Zelpha Bennett	Susan Moore	\$ 0.00	3PCA - Canceled

Step 6: Selecting the Document

The search returns a list of purchase orders meeting the search criteria.

Click on the blue hyperlinked PO number to open the desired document.

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 from the Status column header, if you want to filter your results.

Master Blanket Purchase Order PO-17-1080-OSD07-OSD07-7763 Status: 3PS - Sent

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

Header Information

Purchase Order Number: PO-17-1080-OSD07-OSD07-7763 Release Number: 0 Short Description: GRO30

Status: 3PS - Sent Purchaser: Zelpha Bennett Receipt Method: Quantity

Fiscal Year: 2017 PO Type: Blanket Minor Status:

Organization: Operational Services Division Location: OSD07 - OSD TRAINING Type Code: Statewide Contract

Department: OSD07 - OSD TRAINING Entered Date: 09/15/2016 04:51:45 PM Control Code:

Alternate ID: 0 Retainage %: 0.00% Discount %:

Days ARO: 0 Release Type: Direct Release - BFA Release Allowed Pcard Enabled: No

Print Dest Detail: If Different Tax Rate: _____ Actual Cost: 0.00

Catalog ID: _____

Contact Instructions: _____

Print Format: Purchase Order Print

Solicitation Enabled: No

Special Instructions: _____

Step 7: Clicking on the Change Orders Tab

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

COMMBUYS+ Search... Catalog Advanced

Master Blanket Purchase Order PO-17-1080-OSD07-OSD07-7763 Status: 3PS - Sent

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

There are no change orders for this document.

Create Change Order

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Step 8: Clicking on the Create Change Order Button

The Change Orders tab displays.

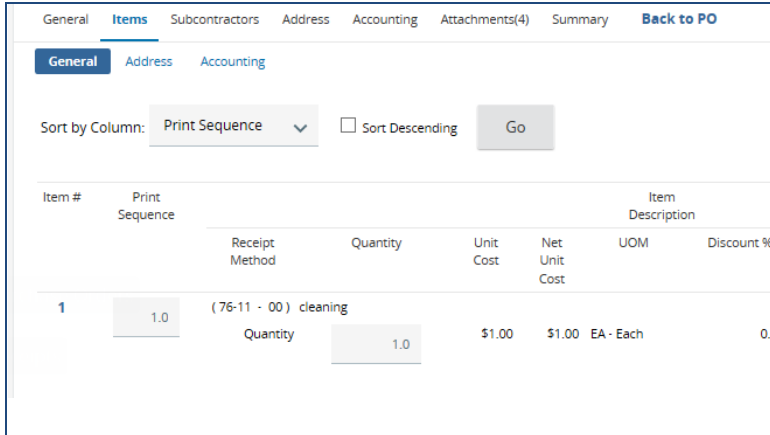
Click on the **Create Change Order** button.



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Screenshot



Directions

Step 9: Selecting a Tab

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

In this example, to make changes to items you originally ordered, such as quantity, cost or description, click on the Number "1" under the Item # column.

Step 10: Making Changes

1. Make the changes and click on the **Save & Continue** button. (For this PO, the quantity on an item was changed.)
2. Once all changes are complete, click on the **Summary** tab.



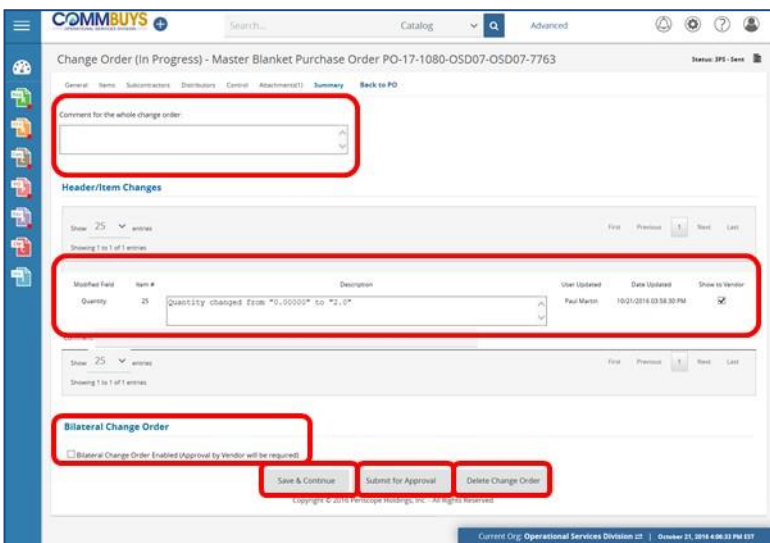
Step 11: Completing the Summary Tab

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.

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.



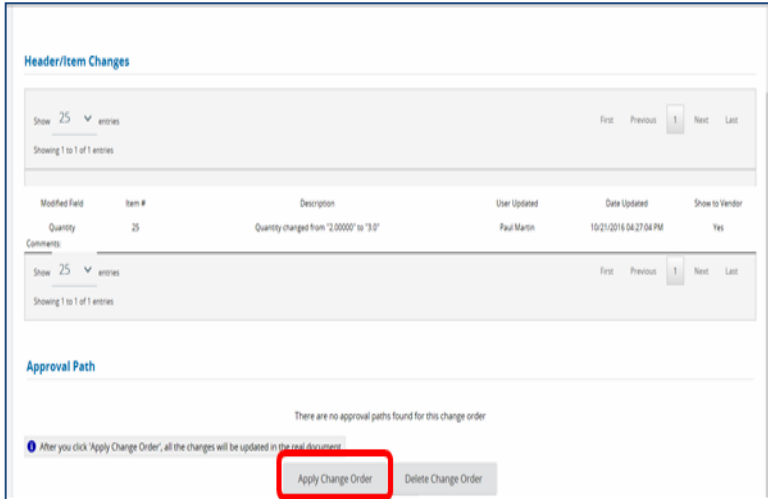
- To confirm the changes, click on the **Save & Continue** button.
- To stop the change, click on the **Delete Change Order** button.
- Change Orders require approval. To submit the change for approval, click on the **Submit for Approval** button.
- The Summary tab redisplay confirming the change order is submitted for approval.



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Screenshot



Directions

Step 12: 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. Then click on the **Apply Change Order** button at the bottom of the Summary tab.

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