

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.

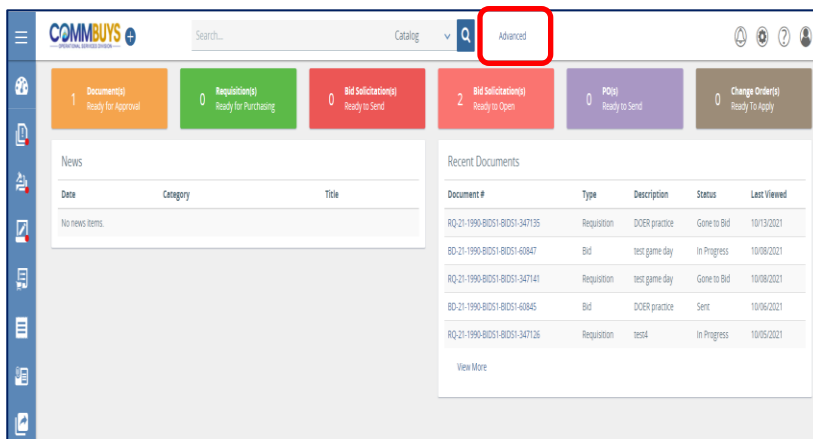
Of Special Note:

- 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.

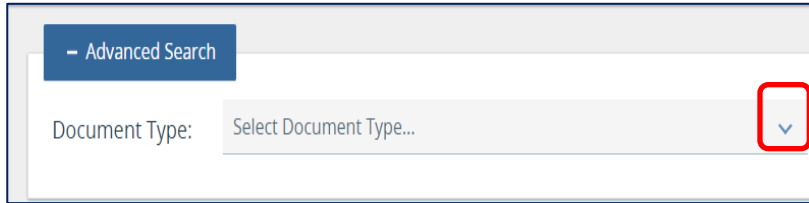
Screenshot

Directions



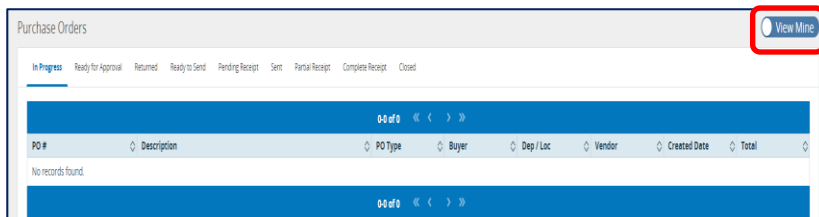
Step 1: Clicking on the Advanced Search Hyperlink

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



– Advanced Search

Document Type: Select Document Type...

Purchase Orders

[View Mine](#)

In Progress Ready for Approval Returned Ready to Send Pending Receipt Sent Partial Receipt Complete Receipt Closed

PO #	Description	PO Type	Buyer	Dep / Loc	Vendor	Created Date	Total
No records found.							

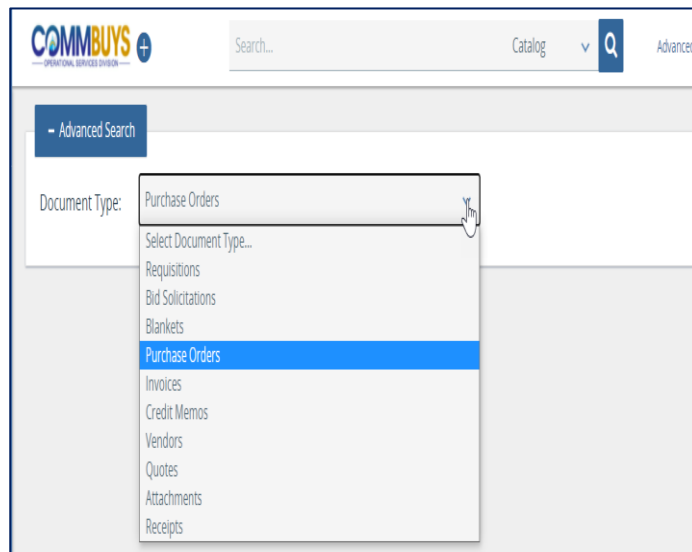
Step 2: Clicking on the Search Dropdown Arrow

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).



– Advanced Search

Document Type: Purchase Orders

- Select Document Type...
- Requisitions
- Bid Solicitations
- Blankets
- Purchase Orders**
- Invoices
- Credit Memos
- Vendors
- Quotes
- Attachments
- Receipts

Advanced Search

Document Type: Purchase Orders Match Criteria: All

Purchase Order #	Purchase Order Release #	Alternate ID
Description	Purchase Order Type Select Purchase Order Type...	Status Select Status...
Department Select Department...	Location Select Location...	Buyer Select Buyer...
Requestor Select Requestor...	Vendor ID	Vendor Name
Item Description	NIGP Class Select NIGP Class...	NIGP Class Item Select NIGP Class Item...
Sent Date From	Sent Date To	Type Code Select Type Code...
Fiscal Year		

Search Clear

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.

Results

1-25 of 3288 < 1 2 3 4 5 6 7 8 9 10 >

PO #	Purchase Order Date	Description	Organization	Department / Location	Purchaser	Vendor	Total	Status
PO141080G0D10SD100000000001	03/18/2014	ITC47 - IT Hardware and Related Services	Operational Services Division	OSD01/OSD10	Sara Siddall	Lenovo	\$0.00	SPS - Sent
PO-21-1990-VADM-VADM-21680	07/20/2021	Contract Name and Description: FAC00	Department of State Purchasing	VADM/VADM	Bill O'Malley	Solicitation Enabled	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21691	10/05/2021	camping program order_12345_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Decelle	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21690	10/05/2021	camping program order_12345_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Bane	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21689	08/26/2021	camping program order_12345_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Bane	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21688	08/26/2021	camping program order_12345_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Kramerica	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21686	08/11/2021	catering contract	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley1	Decelle	\$530.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21685	08/11/2021	catering contract	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley1	Kramerica	\$530.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21684	08/11/2021	test 7	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley14	Kramerica	\$35.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21683	08/11/2021	test 6	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley14	Kramerica	\$35.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21676	07/13/2021	water safety program_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Bane	\$0.00	SPS - Sent
PO-21-1990-BIDS1-BIDS1-21678	07/13/2021	water safety program_pm	Department of State Purchasing	BIDS1/BIDS1	Bill O'Malley15	Kramerica	\$0.00	SPS - Sent

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.

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

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

Step 6: Clicking on the Change Orders Tab

The PO opens to the Summary tab. Click 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

There are no change orders for this document.

Create Change Order

Step 7: Clicking on the Create Change Order Button

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.

Change Order (In Progress) - Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679 Status: PPS - 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	Unit Cost	Net Unit Cost	UDOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Cancel
1	1.0	(48-16 - 16) water safety equipment - lifelines, pool rings, pool ropes, and pool alarms								\$0.00	<input type="checkbox"/>
		Quantity	1.0	\$0.00	\$0.00	54- Each	0.00%	\$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](#)

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Step 8: Selecting a Tab

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.

Change Order (In Progress) - Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679 Status: SP5 - Sent

General Items Subcontractors Distributors Control **Summary** Back to PO

General

Item #: 1 Print Sequence: 1.0 Item Type: Normal

Item Status: SP5 - Sent Stock Item Number: Begin Date: End Date:

Req # / Item #: 10-21-1990-BIDS1-BIDS1-348285 / 1 Bid # / Bid Item #: 10-21-1990-BIDS1-BIDS1-48759 / 1 Quote # / Quote Item #: 107-1990-BIDS1-BIDS1-89346 / 1

Description: water safety equipment - life vests, pool rings, pool ropes, and pool alarms.

Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt	Total
Quantity	1.0	0.00	90.00	EA	0.0	0.00	\$0.00

UNSPSC Segment Family: 46-16 46-16 - Public safety and control

UNSPSC Class: 16 16 - Water safety

Commodity EPP:

Additional product information

Image management

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.

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

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.

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

Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679 Status: **Sent**

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

Change Order #	Status	Vendor Change Order Sequence #	Comment	Posted Date	Posted User	Created Date	Created User
1	Ready to Send	For Internal Only				10/13/2021 09:16:40 AM	Bill O'Malley

Apply/Delete Change Order

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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.

Change Order (Ready to Send) - Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-21679 Status: **Sent**

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

Comments for the whole change order:

Header/Item Changes

Show 25 entries
Showing 1 of 1 entries

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Description	1	Description changed from "water safety equipment - life vests, pool rings, pool ropes, and pool alarms;" to "water safety equipment."	Bill O'Malley	10/13/2021 09:34:20 AM	Yes

Comments:

Show 25 entries
Showing 1 of 1 entries

Approval Path

There are no approval paths found for this change order.

After you click 'Apply Change Order', all the changes will be updated in the real document.

Apply Change Order Delete Change Order