



Version	9.0
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Last Changed by	System Office
Status	Final

Entering PO Change Orders

Concept

When you update a purchase order that has been dispatched, you create a change order. With MaineStreet Purchasing, you can create change orders using the Add/Update Purchase Order pages. Only staff with the Campus Admin or Super Approver roles can create purchase order changes.

Not all changes to purchase orders are considered “Change Orders”. For example, changing the Distribution will not create a change order. Think of a change order as being some type of change that the vendor must be notified about so they can adjust your order. For example, product description, quantity, price, ship to, freight terms, etc.

A change order number identifies the batch of changes that you submit to the vendor for a purchase order after its initial dispatch. The first time you update a dispatched purchase order, the system displays Change Order 1 next to the purchase order number in the purchase order header. Each time you update the purchase order after dispatching a batch of changes to the vendor, the change order number is increased by one. Therefore if you changed the same purchase order twice the system displays Change Order 2 next to the purchase order number.

A change sequence number tracks the sequence of changes made within each purchase order at the header, line, and schedule levels. After the initial dispatch of a purchase order, a change sequence number is assigned to each change. These sequence numbers don't appear on the purchase order, but appear in the purchase order history. Purchase order change history can be viewed from the MaineStreet menu: **Purchasing>Purchase Order>Manage Change Orders>Review Change History**.

Here is an example of batch changes.

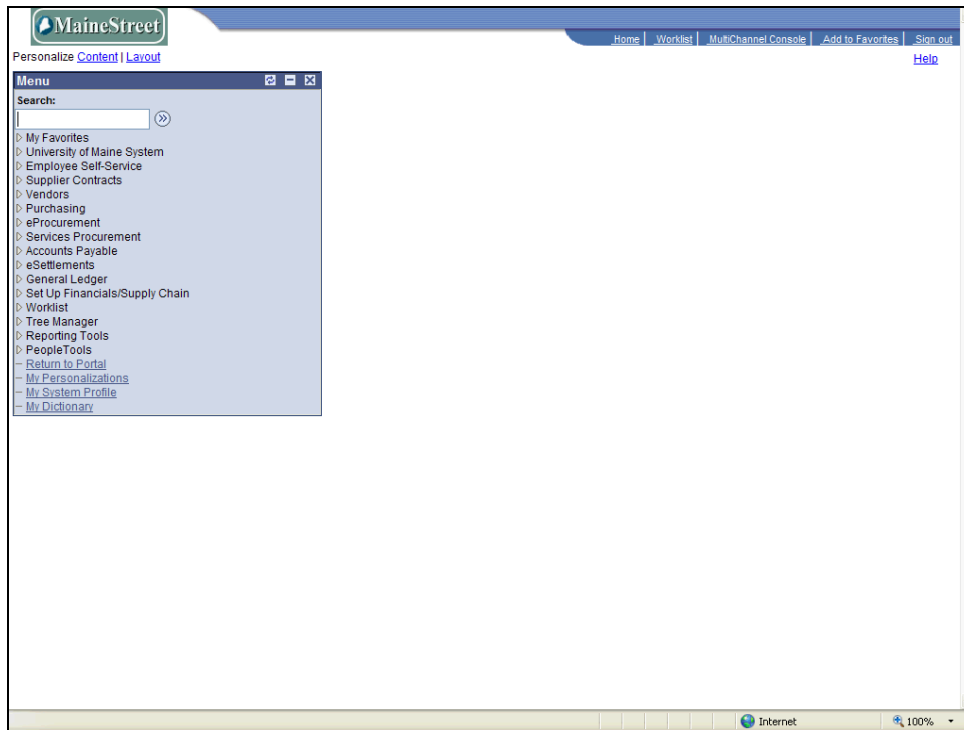
You dispatch a purchase order containing three lines. You then create a change on line 1. The header change order batch number is set to 1; the change sequence number for the first line is also 1.

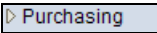
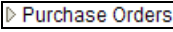

A historical row is created to store original values for line 1. The header change order batch number is 0 and change sequence number for the first line is 0.

After you dispatch the first batch of changes (change order batch number 1), you change lines 1 and 3.

- The change order batch number is 2, because you are making changes after dispatching change order number 1.
- Because this is the second time that you have changed line 1, its change sequence is 2.
- Because you have changed line 3 for the first time, its change sequence is 1.

Navigation

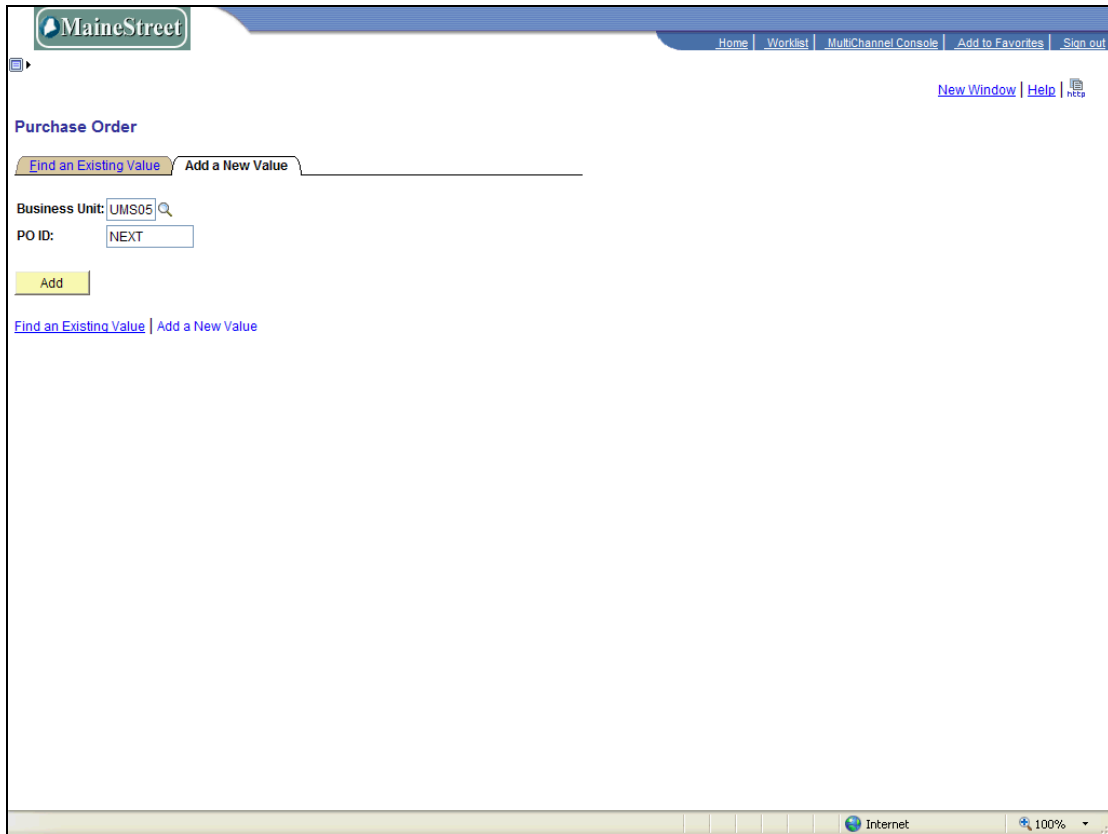


Step	Action
1.	Begin by navigating to the Purchase Order page. From the Financials menu, click the Purchasing link . 
2.	Click the Purchase Orders link. 
3.	Click the Add/Update POs link. 



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Step	Action
4.	Click the Find an Existing Value tab. Find an Existing Value

Process Document

Financials 9.0: Entering PO Change Orders



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[New Window](#) | [Help](#) |

Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: =

PO Number: begins with

Purchase Order Date: =

PO Status: =

Short Vendor Name: begins with

Vendor ID: begins with

Name 1: begins with

Buyer: begins with

PO Type: =

Purchase Order Reference: begins with

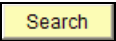
Department: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Done Internet 100%

Step	Action
5.	Enter the appropriate PO ID into the <i>PO Number</i> field.
6.	Click the Search button. 



Process Document

Financials 9.0: Entering PO Change Orders

Maintain Purchase Order

Purchase Order

Unit: UMS05 Department charging is LASST Inst & Ctr PO Status: Dispatched
PO ID: 5000043642 Budget Status: Valid
Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 12/04/2008 Vendor Search
Vendor: MCMaster-C-001 Vendor Details
*Vendor ID: 0000002778 MCMaster-CARR SUPPLY
*Buyer: 0099999 Employee Name
PO Reference: [Text Box]

Backorder Status: None Create BackOrder
Receipt Status: Not Recvd
*Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 41.50
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 41.50 USD

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		95630A470 Teflon flat washer ID 0.281, OD 0.500, screw size 1/4"	10.0000	PKG	MISC	4.15000	41.50	Active

*Go to: [More ...]

Save Return to Search Notify Refresh Add Update/Display

Step	Action
7.	Use the Purchase Order page to create and update purchase orders online. First, click the Header Details link Header Details

Process Document

Financials 9.0: Entering PO Change Orders



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Maintain Purchase Order

PO Header Details

Unit: UMS05 PO ID: 5000043642 Vendor: MCMASTER-C-001

PO Details

Vendor: MCMASTER-C-001 PO Date: 12/04/2008
 *PO Type: RO Budget Status: Valid
 *Billing Location: B500000001 Billing Address Tax Exempt ID: E10424
 Origin: ONL On-line Letter of Credit ID:

Currency


Currency Code: USD Exchange Rate Detail Base Currency: USD
 Rate Date: 12/04/2008 Exchange Rate: 1.00000000
 Rate Type: CRRNT

Process Control Option

Acknowledgements required for Not required
 Dispatch *Method: Print
 Accounting Date: 12/04/2008
 Accounting Template: STANDARD

OK Cancel Refresh

Done Internet 100%

Step	Action
8.	<p>On the PO Header Details page, change the Accounting Date to Current Date. You cannot create a change order unless the PO is in the current accounting date.</p> <p>Click the Choose a date button.</p> 



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Maintain Purchase Order

PO Header Details

Unit: UMS05 PO ID: 5000043642 Vendor: MCMaster-C-001

PO Details

Vendor: MCMaster-C-001 PO Date: 12/04/2008
*PO Type: RO Budget Status: Valid
*Billing Location: B500000001 [Billing Address](#) Tax Exempt ID: E10424
Origin: ONL On-line Letter of Credit ID:

Currency

Currency Code: USD [Exchange Rate Detail](#) Base Currency: USD
Rate Date: 12/04/2008 Exchange Rate: 1.00000000
Rate Type: CRRNT

Process Control Option

Acknowledgements required for: Not required Accounting Date: 12/04/2008
 Dispatch *Method: Print Accounting Template: STANDARD

OK Cancel Refresh

December 2008
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31
[Current Date](#)


Internet 100%

Step	Action
9.	Click the Current Date link. Current Date
10.	Click the OK button. OK

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Step	Action
11.	<p>On the Purchase Order page, to make changes to Header Details, such as Buyer or Billing Location, click the <i>Change Order</i> button in the upper-right corner of the page. This will cause the fields that trigger header level change order to become available for entry.</p> <p>Click the <i>Change Order</i> (triangle) button.</p> 



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Maintain Purchase Order

Purchase Order

Unit: UMS05 **Department charging is LASST Inst & Ctr** PO Status: Dispatched

PO ID: 5000043642 Budget Status: Not Chk'd

Copy From: Hold From Further Processing

Header

*PO Date: 12/04/2008 Vendor Search
 Vendor: MCMASTER-C-001 [Vendor Details](#)
 *Vendor ID: 0000002778 MCMASTER-CARR SUPPLY
 *Buyer: 0099999 Employee Name
 PO Reference:

Backorder Status: None [Create BackOrder](#)
 Receipt Status: Not Recvd
 *Dispatch Method: Print

Amount Summary

Merchandise: 41.50
 Freight/Tax/Misc.: 0.00
 Total Amount: 41.50 USD

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Lines

Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFO | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		95630A470 Teflon flat washer ID 0.281, OD 0.500, screw size 1/4"	10.0000	PKG	MISC	4.15000	41.50	Active

*Go to:

Done Internet 100%

Step	Action
12.	<p>To make changes to PO Defaults, such as <i>Ship To</i>, <i>Ship Via</i>, <i>Freight Terms</i>, click the PO Defaults link. You may also make changes to the Distribution here, although Distribution changes are not considered Change Orders.</p> <p>Click the PO Defaults link.</p> <p>PO Defaults</p>



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Maintain Purchase Order

Purchase Order Defaults

Unit: UMS05 PO ID: 5000043642 Vendor: MCMaster-C-001

Default Options

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category: Unit of Measure:

Ship To: 5000000325 LASST Ultimate Use Code:

Original Promise Date:

Ship Via: BESTWAY Freight Terms Code: DEST_ALLWD

Arbitration: Freight Charge Method:

*Distribute by: [One Time Address](#)

Distribution

SpeedChart:

Distributions

Chartfields Asset Information

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Project	Affiliate	Fur
1	100.0000	UMS05	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

Done Internet 100%

Step	Action
13.	<p>Changes made on the Purchase Order Defaults page will default to all lines on the PO. When you click OK you will be required to complete the Retrofit page. You must complete the Retrofit page or the purchase order will not process. Alternatively, you can make these changes at the Line Level for each line however it is easier to make them once using the PO Defaults link.</p> <p>Click the OK button.</p> <p><input type="button" value="OK"/></p>

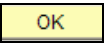


Process Document

Financials 9.0: Entering PO Change Orders

The screenshot shows the 'Maintain Purchase Order' page in the MaineStreet system. The page title is 'Retrofit field changes to "all" existing PO lines/schedules/distributions.....'. It displays the following information:

- Unit: UMS05 PO ID: 5000043642 Vendor: MCMaster-C-001
- Instructions: For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules. For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line. Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO. Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.
- Table with columns: Apply, Distrib Line, Field Name, Field Value, Apply to All Distribs. Row 1: 1 Budget Date 2009-02-25
- Buttons: Select All, Clear All, OK, Cancel, Refresh

Step	Action
14.	For explanation of Retrofit see the "Creating Requisitions" topic. Click the OK button. 

Process Document

Financials 9.0: Entering PO Change Orders



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New Window | Help | Customize Page |

Maintain Purchase Order

Purchase Order

Unit: UMS05 **Department charging is LASST Inst & Ctr** PO Status: Dispatched

PO ID: 5000043642 Budget Status: Not Chk'd

Copy From: Hold From Further Processing

Header

*PO Date: 12/04/2008 Vendor Search
 Vendor: MCMASTER-C-001 [Vendor Details](#)
 *Vendor ID: 0000002778 MCMASTER-CARR SUPPLY
 *Buyer: 0099999 Employee Name
 PO Reference:

Backorder Status: None [Create BackOrder](#)
 Receipt Status: Not Recvd
 *Dispatch Method: Print

Amount Summary

Merchandise: 41.50
 Freight/Tax/Misc.: 0.00
 Total Amount: 41.50 USD

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Lines Customize | Find | View All | First 1 of 1 Last

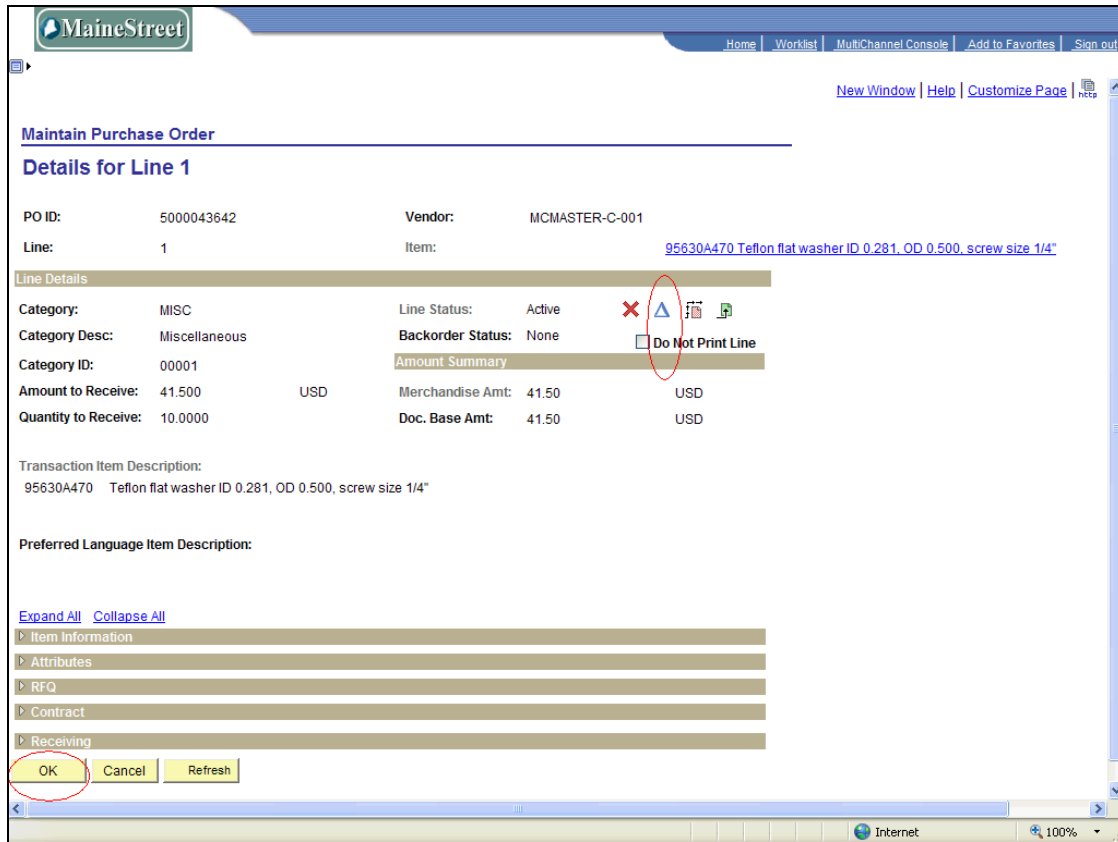
Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		95630A470 Teflon flat washer ID 0.281, OD 0.500, screw size 1/4"	10.0000	PKG	MISC	4.15000	41.50	Active

*Go to:

Internet 100%

Step	Action
15.	To make a change to the Line Description access the Line Details icon, click the Line Details button.



Step	Action
16.	On the Details for Line 1 page, click the <i>Chng Line</i> (triangle) icon. The fields that trigger line level change order become available for entry. When finished, click the OK button.

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Maintain Purchase Order

Purchase Order

Unit: UMS05 **Department charging is LASST Inst & Ctr** PO Status: Dispatched

PO ID: 5000043642 Budget Status: Not Chk'd

Copy From: Hold From Further Processing

Header

*PO Date: 12/04/2008 Vendor Search
 Vendor: MCMASTER-C-001 [Vendor Details](#)
 *Vendor ID: 0000002778 MCMASTER-CARR SUPPLY
 *Buyer: 0099999 Employee Name
 PO Reference:

Backorder Status: None [Create BackOrder](#)
 Receipt Status: Not Recvd
 *Dispatch Method: Print

Amount Summary


Merchandise: 41.50
 Freight/Tax/Misc.: 0.00
 Total Amount: 41.50 USD

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		95630A470 Teflon flat	10.0000	P	MISC	4.15000	41.50	Active

*Go to:

Internet | 100%

Step	Action
17.	<p>To make Schedule changes at the Line Level (<i>Ship To, Ship Via, Freight Terms</i>), first click the <i>Schedule</i> icon.</p> <p>Click the Schedule button.</p> 



Process Document Financials 9.0: Entering PO Change Orders

Maintain Purchase Order

Schedules

Unit: UMS05 Vendor: MCMaster-C-001
PO ID: 5000043642 PO Date: 12/04/2008
PO Status: Dispatched

[Return to Main Page](#)

Lines Find | View All First 1 of 1 Last

Line: 1 Item: 95630A470 Teflon flat washer ID 0.281_OD 0.500_screw size 1/4 PO Qty: 10.0000 PKG Amount: 41.50 USD

Schedules Customize | Find | View All | First 1 of 1 Last

Details Statuses Shipment Matching Receiving Freight RTV

Sched	*Ship To	*PO Qty	Price	Amount	Status
1	5000000325	10.0000	4.15000	41.50	Active

Save Return to Search Notify Refresh Add Update

Step	Action
18.	<p>Then, on the Schedules page, click the Statuses Tab.</p> <p>Note: You can also make changes to the Distribution, however, these changes are not considered Change Orders. To access the Distribution, click the Schedule icon, then click the Distribution icon, make the changes, then click OK.</p> <p>Click the Statuses tab.</p> <p>Statuses</p>

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Maintain Purchase Order

Schedules

Unit: UMS05 Vendor: MCMaster-C-001
 PO ID: 5000043642 PO Date: 12/04/2008
 PO Status: Dispatched

[Return to Main Page](#)

Line	Item	PO Qty	PKG	Amount
1	95630A470 Teflon flat washer ID 0.281, OD 0.500, screw size 1/4	10.0000		41.50 USD


Schedules

Details | **Statuses** | Shipment | Matching | Receiving | Freight | RTV

Sched	*Ship To	Status
1	5000000325	Active

Save | Return to Search | Notify | Refresh | Add | Update

Internet 100%

Step	Action
19.	Then, with the <i>Statuses</i> tab selected, click the <i>Create Schedule Change</i> button. The fields that trigger change order schedule level changes become available for entry. 



Process Document

Financials 9.0: Entering PO Change Orders

Maintain Purchase Order

Schedules

Unit: UMS05 Vendor: MCMMASTER-C-001
PO ID: 5000043642 PO Date: 12/04/2008
PO Status: Dispatched

[Return to Main Page](#)

Line	Item	PO Qty	PKG Amount
1	95630A470 Teflon flat washer ID 0.281_OD 0.500_screw size 1/4	10.0000	41.50 USD

Schedules

Sched	*Ship To	Status
1	5000000325	Active

Buttons: Save, Return to Search, Notify, Refresh, Add, Update

Step	Action
20.	To access the <i>Ship To</i> and <i>Ship Via</i> fields, click on the <i>Shipment</i> Tab. To access the <i>Freight Terms</i> click the <i>Freight</i> Tab.

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New Window | Help | Customize Page

Maintain Purchase Order

Schedules

Unit: UMS05 Vendor: MCMaster-C-001
 PO ID: 5000043642 PO Date: 12/04/2008
 PO Status: Dispatched

[Return to Main Page](#)

Lines Find | View All First 1 of 1 Last

Line: 1 Item: 95630A470 Teflon flat washer ID 0.281_OD 0.500_screw size 1/4 PO Qty: 10.0000 PKG Amount: 41.50 USD

Schedules Customize | Find | View All | First 1 of 1 Last

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV


Sched *Ship To Freight Terms Arbitration Charge Method Freight Charge Override

1 5000000325 DEST_ALLWC

Save Return to Search Notify Refresh Add Update

Done Internet 100%

Step	Action
21.	On the Schedules page, click the Return to Main Page link.

Step	Action
22.	<p>On the Purchase Order page, if you add a line, this automatically creates a change order for the line and new schedules are added. If you change the quantity on a purchase order line, and only one schedule exists, this automatically creates a change order for the schedule.</p> <p>You do not have to click the Create Line Change button to make changes to the purchase order line quantity. The line quantity serves as a work field on the purchase order, so changes to its value are not tracked as changes. However, the system creates a schedule-level change order.</p> <p>When finished, click the Save button.</p> 

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New Window | Help | Customize Page |

Maintain Purchase Order

Purchase Order

Unit: UMS05 **Department charging is LASST Inst & Ctr** PO Status: Approved

PO ID: 5000043642 Budget Status: Not Chk'd

Change Order: 1

Copy From: Hold From Further Processing

Header

*PO Date: 12/04/2008 Vendor Search
 Vendor: MCMASTER-C-001 [Vendor Details](#)
 *Vendor ID: 0000002778 MCMASTER-CARR SUPPLY
 *Buyer: 0099999 Employee Name
 PO Reference:

[Header Details](#) [PO Activities](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)
[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Receipt Status: Not Recvd
 *Dispatch Method: Print
Amount Summary
 Merchandise: 41.50
 Freight/Tax/Misc.: 0.00
 Total Amount: 41.50 USD

Lines Customize | Find | View All | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		95630A470 Teflon flat washer ID 0.281, OD 0.500, screw size 1/4"	10.0000	PKG	MISC	4.15000	41.50	Active

*Go to:

Internet 100%

Step	Action
23.	End of Procedure.