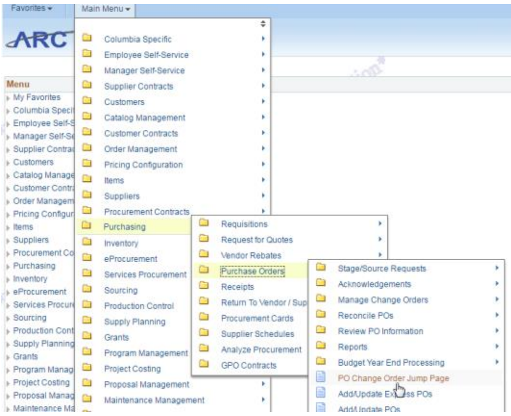
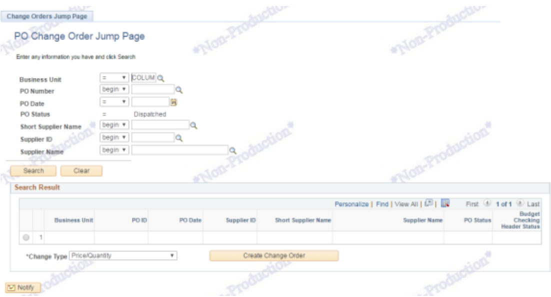
A Change Order is used to modify Purchase Order details. They allow you to modify the Purchase Order commitment (dollar, time, service), communicate an update to vendors, or resolve an exception. Change orders are also used to modify the distribution/allocation indicated in the ChartField(s) specified in the original Purchase Order.

Navigating to the PO Change Order Jump Page

Select **Main Menu** > **Purchasing** > **Purchase Orders** > **PO Change Order Jump Page.**

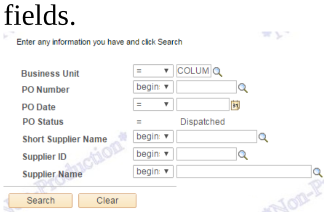


The PO Change Order Jump Page appears.

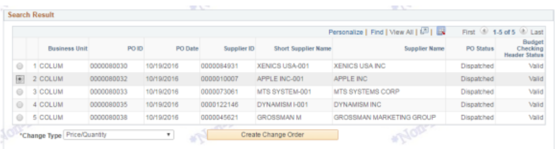


Searching for the Purchase Order(s) to Change

1. Enter the Purchase Order information in the search fields.



2. Click **Search.**
2. Select the Purchase Order you want to change from the search results.

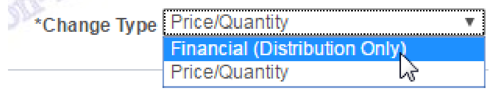


Creating a Financial (Distribution Only) Change Order

A Financial Change Order is a change to the distribution/allocation indicated in the ChartField(s) specified in the original Purchase Order. For example, if you need to update or change the Department or Project being expensed.

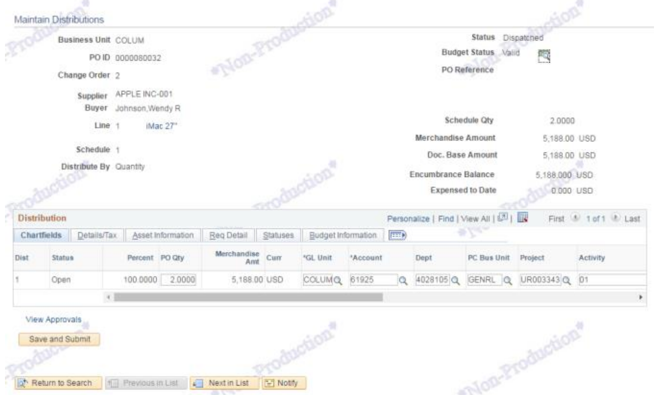
Note: *You cannot create a Financial Change Order if vouchers have already been paid against the line you want to change.*

1. Search for and select Purchase Order to be changed.
2. Select *Financial (Distribution Only)* from the **Change Type** dropdown.

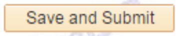


3. Click **Create Change Order**.

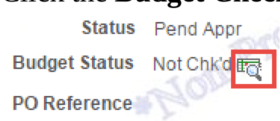
The Maintain Distribution page appears.



4. Make the necessary changes to the ChartFields in the **Distribution** section.
5. Click **Save and Submit**.



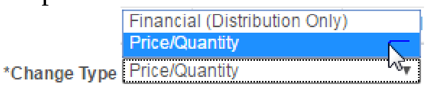
6. Click the **Budget Check** icon to budget check.



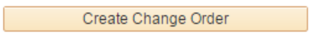
Creating a Price / Quantity Change Order

A Price/Quantity Change Order is a change made to the line attributes of the Purchase Order such as the price, quantity, period of performance or category of the good or service being purchased.

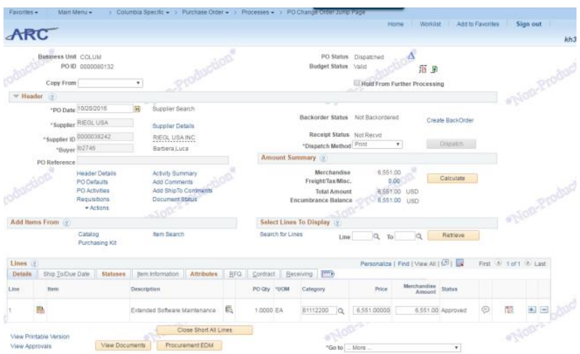
1. Search for and select Purchase Order to be changed.
2. Select *Price/Quantity* from the **Change Type** dropdown.



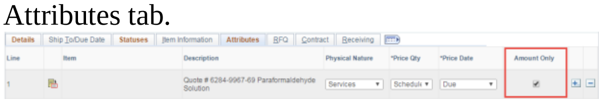
3. Click **Create Change Order**.



The Maintain Purchase Order page appears.

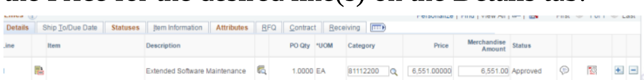


Click the **Details**, **Statuses** or **Attributes** tabs for more information about your Purchase Order lines. The **Amount Only** flag is displayed on the Attributes tab.



Changing Price

If the **Price** field is available for edit (the Amount Only flag is checked on the Attributes tab) you can change the Price for the desired line(s) on the Details tab.

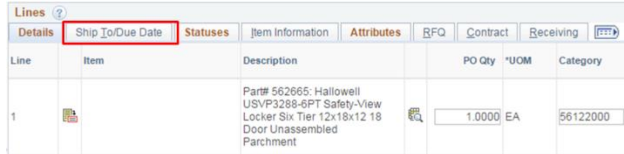


Changing Quantity

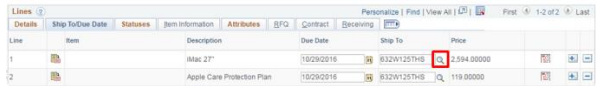
If you need to edit the Quantity of a product, change the **PO Qty** field to the desired quantity.

Updating Ship-to Information

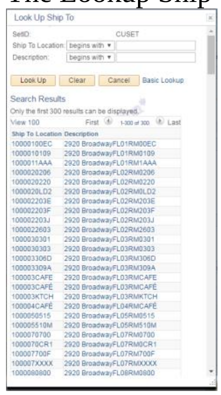
1. Click the **Ship To/Due Date** tab.



2. Click the **Ship-to** search icon for the line requiring the shipping change.



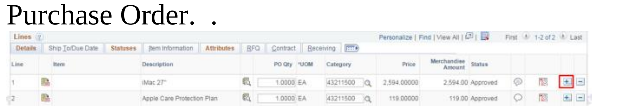
The Lookup Ship-to window appears.



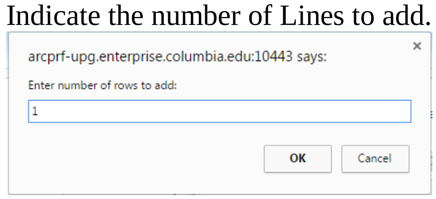
3. Search and select your **Ship To Location**.
Note: *If your Ship To address needs to be added to the list of Locations, enter a Service Now request.*

Adding New Line(s)

1. Click the **+** button to add a new Line(s) to the Purchase Order. .



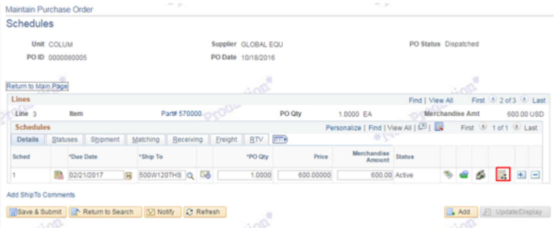
2. Indicate the number of Lines to add.



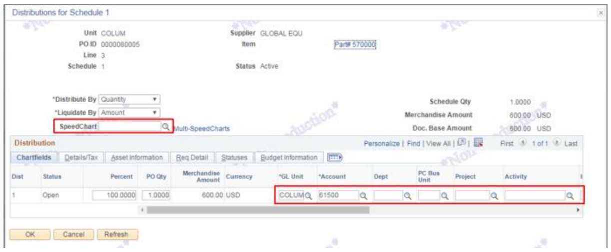
The new Line(s) appear.

3. Complete the Details for the new Line(s).
4. Click the **Schedule** icon to enter the Distribution for each new Line. 

5. Click the **Distribution/ChartString** icon.



6. Update the Distribution **ChartFields** or use the **SpeedChart** to add the ChartString for the Distribution.



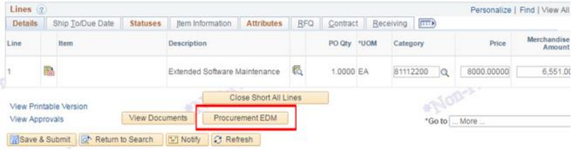
7. Click **OK**.
8. You can click **Save & Submit** or click **Return to Main Page** to continue working on the Change Order.

Uploading Justification Documentation

For Price/Quantity Change Orders, it is helpful to have one or more of the following applicable documents for upload:

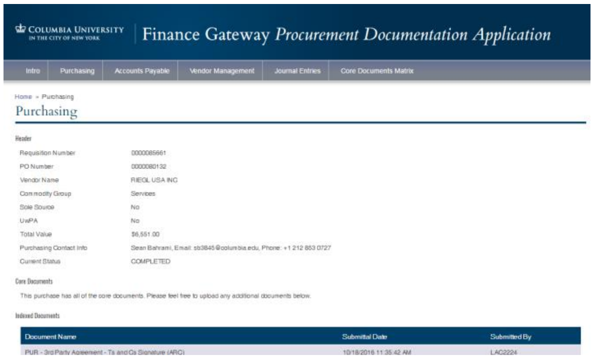
- An invoice showing the change
- Agreement or contract amendment
- Proposal or quote with details
- A memo that gives your explanation for the change

1. Click the **Procurement EDM** button.

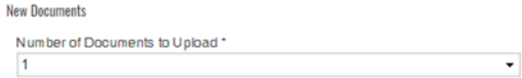


The Procurement Documentation Application opens displaying your Purchase Order information with existing documentation.

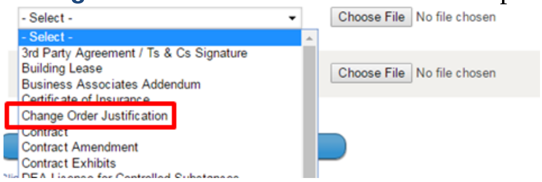
Note: *If the application opens to the search page you can find your Purchase Order by entering the PO Number.*



2. Indicate the **Number of Documents to Upload** from the dropdown.



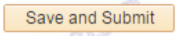
3. For each document you are uploading, indicate **Change Order Justification** from the dropdown.



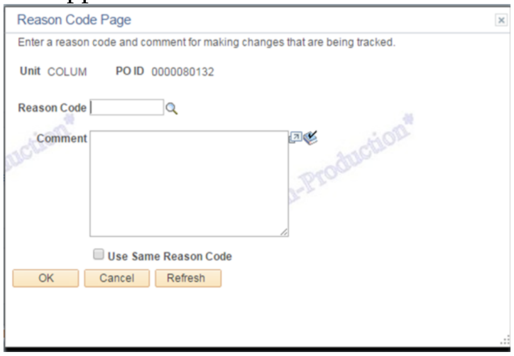
4. Click **Choose File** for each document you are uploading and select the document to upload.
5. Click the **Upload Documents** button.

Saving and Submitting a Price/Quantity Change Order

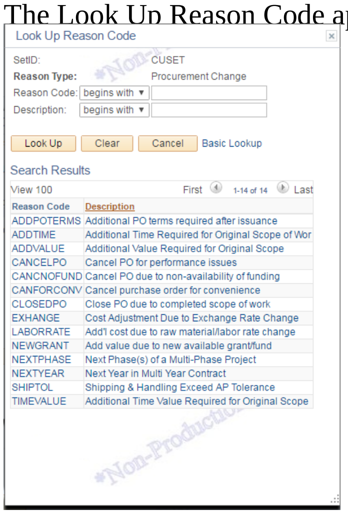
1. Click **Save and Submit**.



The Reason Code Page appears. You must select a Reason Code and provide any additional Comments for Approvers.

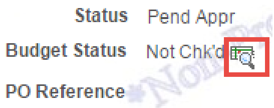


2. Click the **Search** icon to select a **Reason Code**. The Look Up Reason Code appears.



3. Select the appropriate Reason Code.
4. Type any additional **Comments**.

5. Click **OK**.
6. On the Change Order page, click the **Budget Check** icon to budget check.



Getting Help

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now

https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122