

14_Edit Purchase Order (PO)

- Purpose:*** The purpose of this task is to edit a purchase order that has not yet been Issued to the Supplier.
- How to Access:*** Open the **My Recent Purchase Order** worklet and select the required purchase order.
- Audience:*** Buyers and Principals
- Helpful Hints:***
- Be sure to keep in mind that only select users will have access to edit purchase orders in Workday. If you are not authorized to create purchase orders, you will not be able to access this task.
 - After a purchase order has been issued to the supplier, it is not possible to edit the purchase order, you would need to create a Change order.
 - When editing an approved Purchase Order, it goes back through the approval process.
 - Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.
- Procedure:*** Complete the following steps to edit a purchase order.

View Purchase Order

View Purchase Order 🔍 🖨️

Purchase Order **PO-1000142** Status **Approved**

Summary

Company **Cleveland Metropolitan School District**

Supplier **C Pearson Trophy**

Currency **USD**

Document Date **03/07/2017**

Line Total Amount **6,000.00**

Terms and Taxes

Payment Terms **Net 30**

Due Date **(empty)**

Default Payment Type **Check**

Override Payment Type **(empty)**

Credit Card **(empty)**

Supplier Contract **(empty)**

Contact Information

Issue Option **Print**

Buyer **Meghan Manson (434965)**

Bill-To Contact **Charlene Hilliard (421056)**

Bill-To Contact Detail **Charlene Hilliard (421056)**

Bill-To Address **📍 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America**

Ship-To Contact **Charlene Hilliard (421056)**

Ship-To Contact Detail **Charlene Hilliard (421056)**

Ship-To Address **📍 5100 Biddulph Avenue Cleveland, OH 44144 United States of America**

Memo **(empty)**

Internal Memo **(empty)**

Goods Lines | Process History | Printing Runs

Goods Lines 1 Item 🔍 📶 📊 🖨️

Goods Order Line	Line	Item and Category	Tax	Quantity	Cost	Delivery
🔍	1	Item	Tax Applicability	Ordered 60	Unit of Measure Each	Due Date
		Item Description Trophies	Tax Code	Received 0	Unit Cost 100.00	Lead Time
		Spend Category 869SC Other Judgements		Invoiced 0	Extended Amount 6,000.00	

1. Review the order details to confirm this is the correct purchase order to edit.
2. Click **☰** to the right of the Purchase Order number and select **Purchase Order > Edit** to go to the *Edit Purchase Order* screen.

Edit Purchase Order

Edit Purchase Order

Purchase Order PO-1000142

Summary

Company *

Supplier *

Currency

Document Date *

Line Total Amount 6,000.00

Tax Amount 0.00

Freight Amount

Other Charges

Terms and Taxes

Payment Terms

Due Date

Default Payment Type

Override Payment Type

Credit Card (empty)

Supplier Contract

Tax Option

Default Tax Code

Contact Information

Issue Option

Buyer

Bill-To Contact

Bill-To Contact Detail *

Bill-To Address *

Ship-To Contact

Ship-To Contact Detail *

Ship-To Address *

Memo

Internal Memo

Apply header changes to all lines on Save or Submit

Goods Lines
Service Lines
Project-Based Service Lines
Tax
Retention Terms
Prepaid Details
Attachments

3. As required, review and/or change the following Header level (*Contact Information* section) fields:

Field Name	Required / Optional	Description
Bill-To Contact Detail	Required	Identifies the contact information for the party responsible for paying the order.
Bill-To Address	Required	Identifies the address for the party responsible for paying for the order. Note: This address should always default to the 1111 Superior Avenue E. address.
Ship-To Contact Detail	Required	Identifies the contact information for the party receiving the order.
Ship-To Address	Required	Identifies the address for the party responsible for receiving the order.

4. Scroll down to view the line item details.
5. As required, review and/or change the following Item level fields:

Field Name	Required / Optional	Description
Item	Optional	Identifies the name of the product to be procured.
Item Description	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Quantity	Required	Identifies how many items/services to procure.
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> • Each • Box • Case
Unit Cost	Required	Identifies the dollar amount for each item.
Due Date	Optional	Identifies the requested delivery date.
Ship-To Address	Required	Identifies the delivery location for the order.
Memo	Optional	Use to provide additional information to those processing the requisition.
Fund	Required	Identifies which fund will pay for the items being procured.
Cost Center	Required	Identifies the cost center that will pay for the items being procured.
Function	Required	Identifies the function that will pay for the items being procured.
Program	Required	Identifies the program that will pay for the items being procured. Note: Workday defaults this value after entering the cost center.
Additional Worktag	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects.
Splits	Optional	Identifies if the line item is to be broken out for multiple locations.

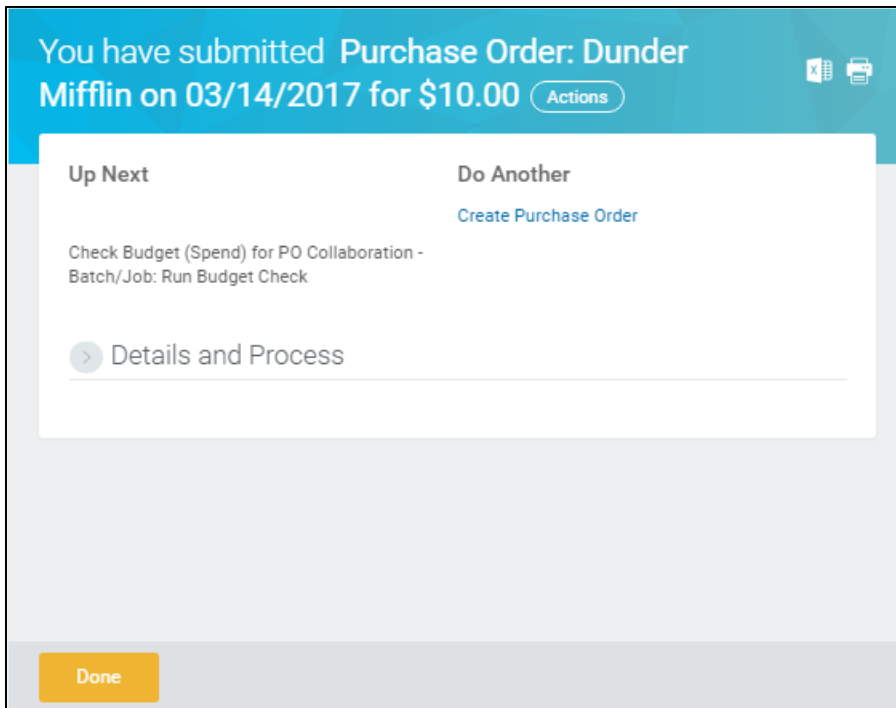
6. As required, complete one or more of the following:

If you want to...	Then...
Add additional line items to your order,	Click + on the Goods Lines tab and complete all required fields.
Remove a line item,	Click - to the left of the line to remove.

7. As required, complete one or more of the following:

If you want to...	Then...	Go To
Submit the edited order,	Click Submit .	Step 8
Save the order for processing at a later time,	Click Save for Later .	Step 10
Cancel the submission of the edited order,	Click Cancel . Note: This only cancels the submission, and the order can be access from the My Recent Purchase Order worklet.	Step 11

You have submitted



8. Review the displayed information, pay particular attention to the Up Next section, to identify the next step in the Edit Purchase Order process.
9. Click **Done**, and go to the **Results** section of the document.

View Purchase Order

View Purchase Order 📄 🖨️

Purchase Order PO-1000181 Status Draft

Summary

Company Cleveland Metropolitan School District

Supplier Dunder Mifflin

Currency USD

Document Date 03/14/2017

Line Total Amount 10.00

Terms and Taxes

Payment Terms (empty)

Due Date (empty)

Default Payment Type Check

Override Payment Type (empty)

Credit Card (empty)

Supplier Contract (empty)

Contact Information

Issue Option Print

Buyer Brandi Robinson (432606)

Bill-To Contact (empty)

Bill-To Contact Detail Brandi Robinson

Bill-To Address 📍 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Ship-To Contact (empty)

Ship-To Contact Detail Brandi Robinson

Ship-To Address 📍 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Memo (empty)

Internal Memo (empty)

Goods Lines Process History

Goods Lines 1 item 🔍 📱 📊 📄 🖨️

Goods Order Line	Line	Item and Category	Tax	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Address
🔍	0	Item	Tax Applicability	Ordered 10	Unit of Measure Each	Due Date			📍 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America
		Item Description Big Gold Star	Tax Code	Received 0	Unit Cost 1.00	Lead Time			
		Spend Category 8890C Other Awards and Prizes		Invoiced 0	Extended Amount 10.00				

10. Review the displayed information, and be sure to record the system generated PO number for future reference.

Note: Use the **My Recent Purchase Orders** worklet to access existing Purchase Orders.

Discard Changes

Discard Changes?

Are you sure you want to discard changes made on this page?


Discard
Continue

11. Click **Discard** to delete the edits for purchase order.

Note: If canceling the order after it has been saved, this pop-up window does not display, as Workday displays the *View Purchase Order* screen.

Result:

You have successfully edited a purchase order.

Note: For additional information on this purchase order, click  to the left of **Details and Process** and review the available details.