

## 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 <b>Each</b>	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 \* X Cleveland Metropolitan School District

Supplier \* X C Pearson Trophy

Currency X USD

Document Date \* 03 / 07 / 2017

Line Total Amount 6,000.00

Tax Amount 0.00

Freight Amount 0.00

Other Charges 0.00

**Terms and Taxes**

Payment Terms X Net 30

Due Date MM / DD / YYYY

Default Payment Type Check

Override Payment Type

Credit Card (empty)

Supplier Contract

Tax Option select one

Default Tax Code

Update Tax

**Contact Information**

Issue Option X Print

Buyer X Meghan Manson (434965)

Bill-To Contact X Charlene Hilliard (421056)

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

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

Ship-To Contact X Charlene Hilliard (421056)

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

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

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

Submit
Save for Later
Cancel

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

Field Name	Required / Optional	Description
<b>Bill-To Contact Detail</b>	Required	Identifies the contact information for the party responsible for paying the order.
<b>Bill-To Address</b>	Required	Identifies the address for the party responsible for paying for the order. <b>Note:</b> This address should always default to the 1111 Superior Avenue E. address.
<b>Ship-To Contact Detail</b>	Required	Identifies the contact information for the party receiving the order.
<b>Ship-To Address</b>	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
<b>Item</b>	Optional	Identifies the name of the product to be procured.
<b>Item Description</b>	Required	Identifies the product to be procured.
<b>Spend Category</b>	Required	Is a way of grouping similar items or services that drives the financial reporting.
<b>Quantity</b>	Required	Identifies how many items/services to procure.
<b>Unit of Measure</b>	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> <li>• Each</li> <li>• Box</li> <li>• Case</li> </ul>
<b>Unit Cost</b>	Required	Identifies the dollar amount for each item.
<b>Due Date</b>	Optional	Identifies the requested delivery date.
<b>Ship-To Address</b>	Required	Identifies the delivery location for the order.
<b>Memo</b>	Optional	Use to provide additional information to those processing the requisition.
<b>Fund</b>	Required	Identifies which fund will pay for the items being procured.
<b>Cost Center</b>	Required	Identifies the cost center that will pay for the items being procured.
<b>Function</b>	Required	Identifies the function that will pay for the items being procured.
<b>Program</b>	Required	Identifies the program that will pay for the items being procured. <b>Note:</b> Workday defaults this value after entering the cost center.
<b>Additional Worktag</b>	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects.
<b>Splits</b>	Optional	Identifies if the line item is to be broken out for multiple locations.

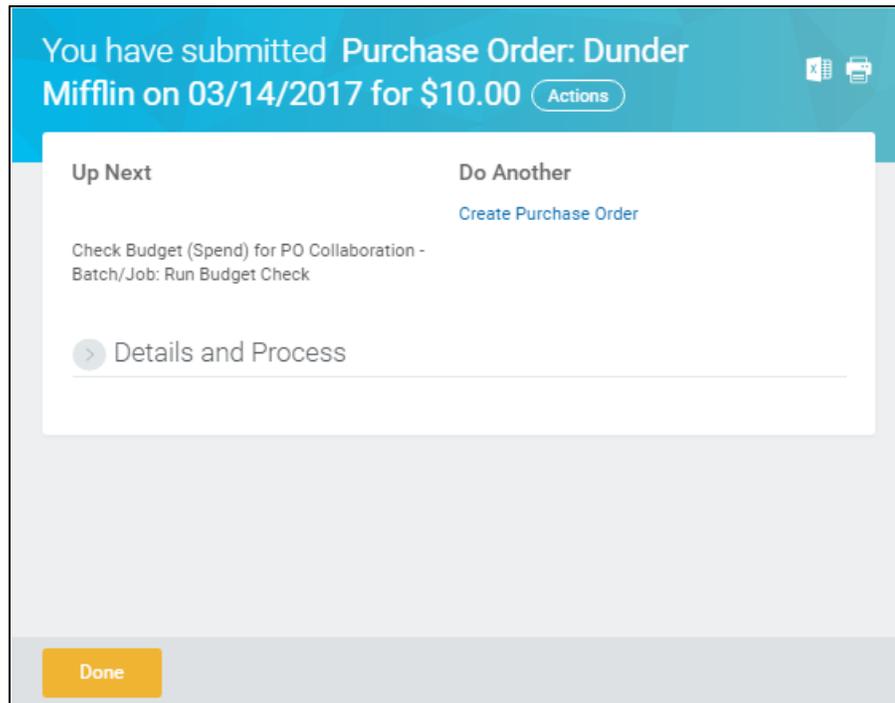
6. As required, complete one or more of the following:

If you want to...	Then...
Add additional line items to your order,	Click <b>+</b> on the <b>Goods Lines</b> tab and complete all required fields.
Remove a line item,	Click <b>-</b> 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 <b>Submit</b> .	<a href="#">Step 8</a>
Save the order for processing at a later time,	Click <b>Save for Later</b> .	<a href="#">Step 10</a>
Cancel the submission of the edited order,	Click <b>Cancel</b> . <b>Note:</b> This only cancels the submission, and the order can be access from the <b>My Recent Purchase Order</b> worklet.	<a href="#">Step 11</a>

*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)

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Goods Lines    Process History

Goods Lines 1 Item 🔍 📊 📄 📱

Goods Order Line	Line	Item and Category	Tax	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Address
Q	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?**

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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.