

16_Create Change Purchase Order (PO)

- Purpose:*** The purpose of this task is to create a Change purchase order, since the original purchase order was already issued.
- 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 create purchase orders in Workday. If you are not authorized to create purchase orders, you will not be able to access this task.
 - If the purchase order has not been issued to the supplier, it is possible to simply edit the original purchase order, and not create a Change order
 - If you need to edit a Change order, you first need to locate the original purchase order, click the **Related Actions** button, select the **Purchase Order Change Order** option, and click **Edit**.
 - 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.
 - You will **NOT** be able to create Change Orders for orders created using a Supplier's website. If additional items are required, create a new order. If removing a line item, you will need to contact the supplier directly.
- Procedure:*** Complete the following steps to create a Change order for an issued purchase order.

View Purchase Order

View Purchase Order 🖨️ 📄

Purchase Order **PO-1000202** Status **Issued**

Summary

Company **Cleveland Metropolitan School District**

Supplier **Main Street Supplies**

Currency **USD**

Document Date **03/22/2017**

Line Total Amount **409.65**

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 **Email**

Buyer **Brandi Robinson (432606)**

Bill-To Contact **(empty)**

Bill-To Contact Detail **Accounts Payable**

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 **📍 17100 Harvard Avenue Cleveland, OH
44128 United States of America**

Memo **Free Shipping**

Internal Memo **(empty)**

Goods Lines Process History Printing Runs Balances

Goods Lines **3 items** 📄 📊 📄 📄

Goods Order Line	Line	Item and Category	Tax	Quantity	Cost	
🔍	1	Item	Tax Applicability	Ordered 10	Unit of Measure Each	Due Date
		Item Description Paper - Reem	Tax Code	Received 0	Unit Cost 27.50	Lead Time

1. Review the order details to confirm this is the correct purchase order to create the Change order.
Note: Pay particular attention to the **Status** field, to confirm the order has been **Issued**. If it has not been **Issued**, refer to the *Edit a Purchase Order* job aid for information on how to edit an existing order.
2. Click **☰ (Related Actions button)** to the right of the Purchase Order number and select **Purchase Order > Create Change Order** to go to the *Edit Purchase Order* screen.

Create Change Order

Create Change Order

Purchase Order PO-1000202

Summary

Company: Cleveland Metropolitan School District

Supplier: Main Street Supplies

Currency: USD

Document Date: * 03 / 22 / 2017

Change Order Creation Date: 03/22/2017

Change Order Total: 409.65

Tax Amount: 0.00

Freight Amount: 0.00

Other Charges: 0.00

Terms and Taxes

Payment Terms: [dropdown]

Due Date: MM / DD / YYYY

Default Payment Type: Check

Override Payment Type: [dropdown]

Credit Card: (empty)

Supplier Contract: [dropdown]

Tax Option: select one

Default Tax Code: [dropdown]

Update Tax

Contact Information

Issue Option: X Email

Buyer: * Brandi Robinson (432606)

Bill-To Contact: [dropdown]

Bill-To Contact Detail: Accounts Payable

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

Ship-To Contact: [dropdown]

Ship-To Contact Detail: Brandi Robinson

Ship-To Address: X 17100 Harvard Avenue Cleveland, OH 44128 United States of America

Memo: Free Shipping

Internal Memo: [text area]

Apply header changes to all lines on Save or Submit

Submit
Save for Later
Cancel

Retention Terms
Proposal Details
Attachments

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

Field Name	Required / Optional	Description
Buyer	Required	Identifies the person who created the order.
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. As required, select the **Apply header changes to all lines on Save or Submit** checkbox.
5. Scroll down to view the line item details.
6. As required, review and/or change the following Item level fields:

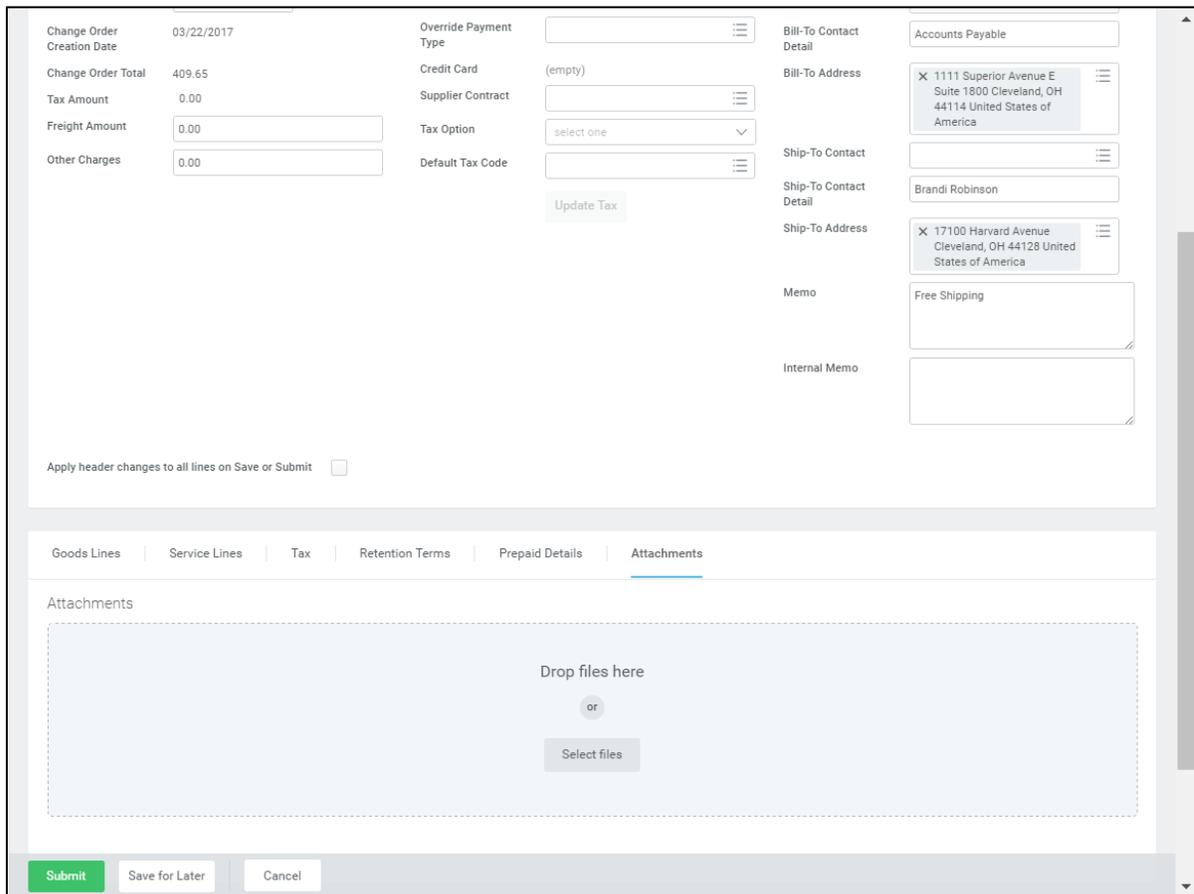
Field Name	Required / Optional	Description
Item	Optional	Identifies the name of the product to be procured.
Item Description	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Ordered (Quantity)	Required	Identifies how many items/services to procure.
Received (Quantity)	Optional	Identifies the number of items received for the line item.
Invoiced (Quantity)	Optional	Identifies the number of items that have been invoiced for the line item.
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. Note: If the line item has been invoiced, this field cannot be changed. If a change is required, please contact the Accounts Payable (AP) department to cancel the invoice.
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	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Additional Worktag	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects. Note: Workday overwrites or defaults in the correct Fund matching the Grant entered in this field.
Splits	Optional	Identifies if the line item is to be broken out for multiple locations.

- As required, click **+** on the **Goods Lines** tab and complete all required fields to add additional line items to your order.

Note: If you accidentally click **+**, when you did not need another line, you will not be able to remove the line item. Select the **Cancel PO Line** checkbox to the left of the required line item to ensure it is not included in the order. This applies to all line items that should not be included in the order.

- Click the **Attachments** tab.

Create Change Order – Attachments



- Click **Select files**, navigate to the required documentation, and click **Open** to add the file to the Change order.

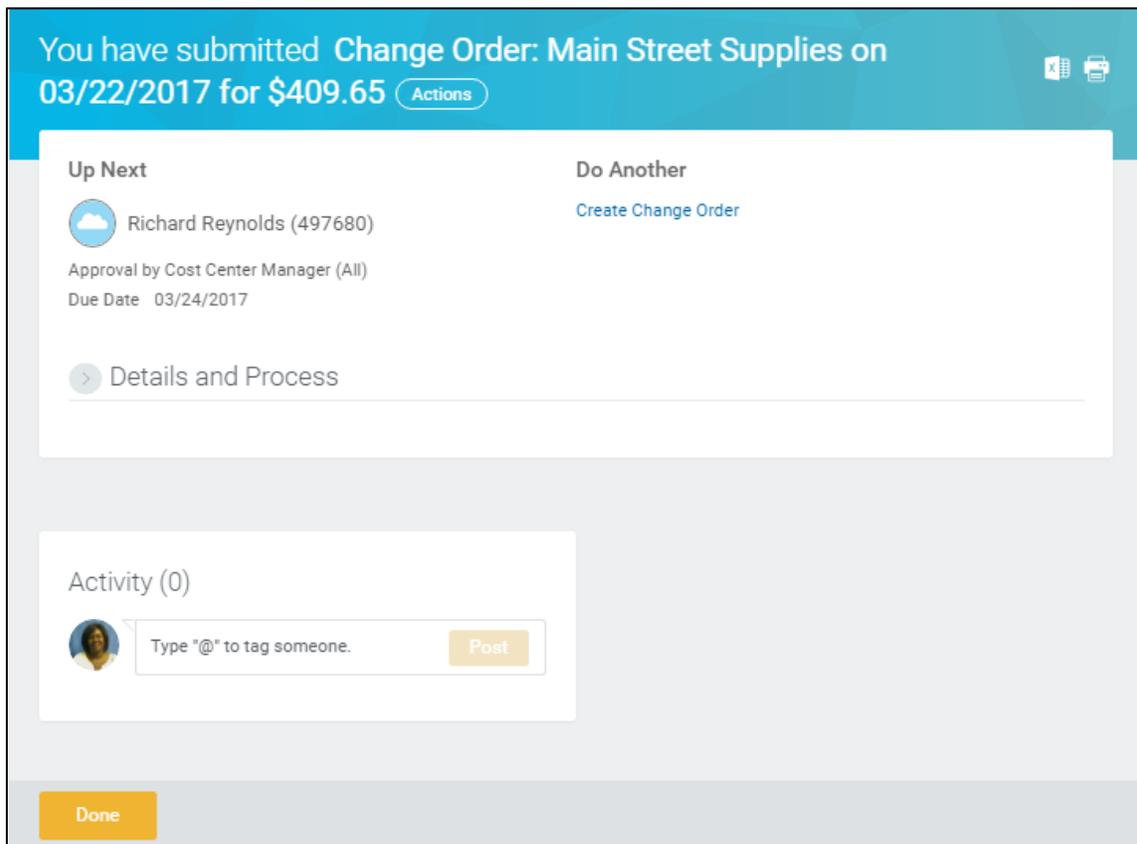
Note: All Change orders require supporting documentation as to why the order must be modified.

- As required, complete one or more of the following:

If you want to...	Then...	Go To
Submit the edited order,	Click Submit .	Step 11

If you want to...	Then...	Go To
Save the order for processing at a later time,	Click Save for Later .	Step 13
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 14

You have submitted



You have submitted **Change Order: Main Street Supplies** on 03/22/2017 for \$409.65 [Actions](#)

Up Next

 Richard Reynolds (497680)
Approval by Cost Center Manager (All)
Due Date 03/24/2017

[Details and Process](#)

Do Another

[Create Change Order](#)

Activity (0)

 Type "@" to tag someone. [Post](#)

[Done](#)

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

View Purchase Order

View Purchase Order Change Order

Purchase Order PO-1000202 Version 1 Change Order Status Draft

Summary

Company: Cleveland Metropolitan School District

Supplier: Main Street Supplies

Currency: USD

Document Date: 03/22/2017

Change Order Creation Date: 03/22/2017

Change Order Total: 409.65

Tax Amount: 0.00

Freight Amount: 0.00

Other Charges: 0.00

Terms and Taxes

Payment Terms: (empty)

Due Date: (empty)

Default Payment Type: Check

Override Payment Type: (empty)

Credit Card: (empty)

Supplier Contract: (empty)

Tax Option: (empty)

Default Tax Code: (empty)

[Update Tax](#)

Contact Information

Issue Option: Email

Buyer: Brandi Robinson (432606)

Bill-To Contact: (empty)

Bill-To Contact Detail: Accounts Payable

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: 17100 Harvard Avenue Cleveland, OH
44128 United States of America

Memo: Free Shipping

Internal Memo: (empty)

Goods Lines Retention Terms Prepaid Details Attachments

Goods Lines 3 items

Cancel PO Line	Line	Item and Category	Tax	Quantity	Cost	
	1	Item	Tax Applicability	Ordered 10	Unit of Measure Each	Due Date
		Item Description Paper - Reem	Tax Code	Received 0	Unit Cost 27.50	Lead Time

13. Review the displayed information.

Note: Use the **My Recent Purchase Orders** worklet to access existing Purchase Orders, and use the **Related Actions** button to access the **Edit Change Order** functionality.

Discard Changes

Discard Changes?

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

Discard
Continue

14. 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 created a Change order for an issued purchase order. Now access your Workday **Inbox** (**Actions** or **Archive** tabs) to confirm the creation of the Change Order and record the order number. Purchase Orders containing a **Version** field to the right of the PO number indicates a change order has been created for the PO.

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