Modifying Purchase Orders

Chapter 5
Modifying Purchase Orders: Overview

Section Objectives

At the end of this chapter, you should be able to:

- Revise incomplete and approved Purchase Orders
Modifying Purchase Orders

You can save a Purchase Order without Approving it. This means the status is Incomplete.

An Incomplete Purchase Order can be modified at any time, and changes can be made to any field, including the Supplier field.

A document that is Approved can also be modified. Changes can be made to any field except the Supplier field.
- Always check for invoicing before modifying an Approved PO (Search for Order, Select Order, View Invoices, Go)
- You should not attempt to change UOM, Quantity, Price, or Account Number for PO lines that have been invoiced.

When you modify an Approved Purchase Order, the document will require re-approval.

To modify Purchase Orders, you simply:
- Search for the Order, and Select it
- Choose Update from the Select Order drop-down menu; Click Go.
- Modify the Order; Save
- Submit for Reapproval

Re-Approval Rules

- Approved documents require re-approval when you add or change specific information, regardless of whether the revision is incremented.

- Almost all changes that cause the document revision to be incremented also require document re-approval.
Modify a Purchase Order

Modify the multi-line Purchase Order you entered in Chapter 4 for the battery and toner from NET XPERTS LLC by modifying the account number and adding a third item.

1. Navigate to the Orders screen

2. Search for the Purchase Order using the Search option (by Order number), or the View option (View Open Orders)

3. Select the Order. Scroll across the line to view Invoiced Amount.
   - If the invoice has been invoiced in full, it can not be modified

4. Choose Update from the Select Order dropdown menu and click Go.
Modify a Purchase Order

Modify the account number for both PO lines, and add a 3rd item, cyan toner.

5. Move to the lines region; place your cursor on line one.

6. Click on the Update icon for line 1

7. Change the account number to the following
   - 02.49010.6021

8. Click Apply

9. Return to the line level; place your cursor on line two

10. Click on the Update icon for line 2, and change the account number for line two to the same account

11. Click Apply

12. Return to the PO Line level.

13. Change the price for item 1 to $160.00
14. To add an additional line item click on “Add 5 Rows”

15. Add a 3rd row for the following product. Enter the line information, or duplicate line 2, and modify line information

   - Cyan toner, HP-CB401A, 1 each @228.00

16. Charge line 3 to the same account number. (If line 3 was duplicated from line 2, the charge account will automatically be applied)

   - 02.49010.6021

17. Save your changes

18. Return to the Header region
Modify a Purchase Order

19. Notice the Revision no. (1) and Status (Requires Reapproval)

20. Submit the document for Approval.

21. **Reapproved orders do not automatically refax to the supplier.**

22. If the supplier requests an updated copy of the PO, once the PO is approved, do the following:

- Search for the PO
- Select the Order
- Click on the Select Order Drop-down menu; Choose Communicate, Go.
- Select Fax as the Communication method & enter the FAX #
- Click Apply.
- You will receive an email Fax Confirmation when the order successfully faxes
View the Action History of a Modified PO

Query the NET XPERTS LLC Purchase Order that you just modified.

1. View “In Process” Orders

2. Select the Order to NET XPERTS and click on the Status field In Process

3. View the Action History

4. Notice that the order is now awaiting the Business Manager’s approval
Lab 6: Modify a Purchase Order

In *Chapter 4*, you entered a multi-line Purchase Order to Franklin Interiors to order furniture for the Dean’s Office. You ordered:

- 1 Desk Chair
- 1 Office table

You discover that you now need one more desk chair.

Modify the original Purchase Order to reflect this change.
Lab 6 Solutions: Modify a Purchase Order

1. Find the order to Franklin Interiors by Viewing Incomplete Orders, or by Searching via PO number

2. Since the order is Incomplete (not yet submitted to Supplier) you do not have to check for invoicing information.

3. Choose Update from the Select Order drop-down menu, and click Go.

4. Modify the quantity on Line 1 and click Save

5. Return to the Header region.
6. Check that the order is complete.

7. Submit the order for Approval/Faxing.