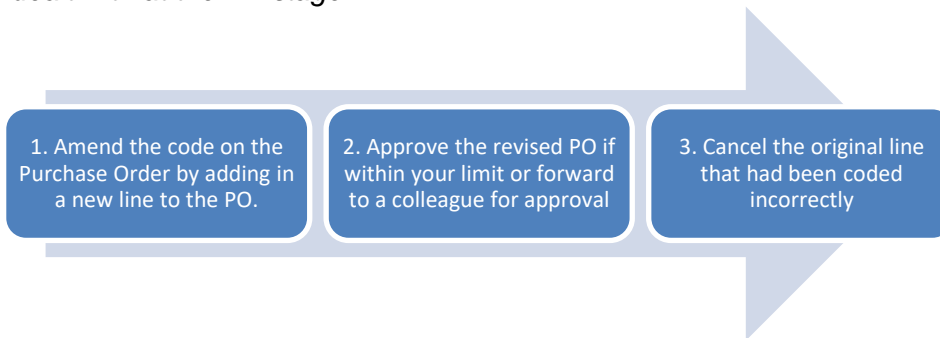


Amending the coding on an approved order

Pre-requisites

The order has not been receipted and its status is **Open**.

The coding on a receipted purchase order cannot be amended, any changes will still need to be dealt with at the AP stage.



Stage 1: Amend the code


1. Go to the Buyers Work Centre and search for the required PO
2. Ensure that your selected PO is Open and unmatched and that **Update** is selected, then **Submit**

Show table data when all conditions are met.
 Show table data when any condition is met.

Order: [is] [3142202] [Search]
Supplier: [is] [] [Search]
Buyer: [is] [] [Search]
Approval Status: [is] [] [Search]




Select Order: Update Submit | Export

Select	OU	Order	Rev	Description	Supplier	Site	Order Date	Total	Curr	Status	Buyer	Closure Status	Matched Amount
<input checked="" type="radio"/>	Cambridge University	3142202	0		RELX (UK) LTD T/A LEXISNEXIS	CROYDON	11-Nov-2019 08:33:47	532.00	GBP	Approved	UTTIN, Mr Robin	Open	0.00

3. Click on **Lines** tab
4. Click on **Add 5 Rows**
5. Duplicate the line that you wish to re-code using the **Duplicate** icon: 
6. Switch to the **Shipments** tab and ensure all data for the new duplicate line is entered
7. Switch to the **Distribution** tab and complete the **Deliver-To** field for the new line
8. Next click on the yellow **pencil** icon for the copied line:
 - a. **Changing from GL to GL:** overwrite the relevant field
 - b. **Changing from GL to Project:** First delete the GL code information on the left then complete the Project fields on the right
9. Click **Apply** then **Save to** confirm the additional line
10. Move on to Stage 2

Stage 2: Approval of revised PO

11. Depending on your approval limit:
 - a. If the total PO value is **within** your approval limit click **Submit**, the PO status will update to Approved, Reserved. Move to Stage 3.
 - b. If **over** your approval limit, click **Approval Options** then:
 - i. Enter **your Dept. Code** into the Approval path and search using Tab key or the icon
 - ii. Select the **XX_PURCHASING** option for your Dept. (*example below is for Dept. AG*)

Quick Select	Approval Path
	AG.Req/PO.No Limits
	AG_PURCHASING
	AG_REQUISITION

- iii. The Approver box appears. Type in the surname of your approver and locate them
 - iv. Add any necessary notes in the text boxes then **Submit Document**. Your PO will be submitted for approval

Stage 3: Cancel the original line from the PO

Once the PO is approved you need to follow the usual Cancel PO Line(s) procedure:

12. In the Buyers Work Centre switch to the Lines tab and add in the Order field using **Add Another** dropdown > choose **Order** > click **Add** button
13. Enter the original PO number in the **Order** field > click **Go**
14. **Select** the *original* line to cancel – *caution here as lines may not be in order*
15. From the **Select Line** dropdown choose **Cancel** > click **Go**
16. Provide a reason as to why this line is being cancelled > click **Apply**

Your PO Status from the Header tab should now show **Approved**.

If however it shows **Requires Reapproval** you need to go into **Update** the order, choose **Approval Options** and forward to an appropriate Approver as in Step 11b above.