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
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: overtype 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)

<table>
<thead>
<tr>
<th>Quick Select</th>
<th>Approval Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>AG.Reg/PO.No Limits</td>
<td>AG_PURCHASING</td>
</tr>
<tr>
<td>AG.REQUISITION</td>
<td></td>
</tr>
</tbody>
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   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.