Buyers Work Centre: Amending Orders

Responsibility	iProcurement Buyer
Navigate	Buyers Work Centre > Orders

You are restricted to what amendments can be made to orders.

The following amendments can be made:

- adding a note/instruction to a supplier to an existing order
- amending a tax code (can also be done at the AP stage)
- tracking an item as an asset (can also be done at the AP stage)
- cancelling an order line (as long as order is not receipted)
- cancelling an entire order (as long as order is not receipted)
- finally closing an order (only if invoice has been processed but not matched to PO)
- finally closing an order line (only if invoice has been processed but not matched to PO)

Once an amendment has been made to an already approved order, the order may require re-approval depending on the type of amendment and what the approval limit is of the individual making the amendment. Revised versions of Marketplace orders do not automatically transmit.

The following amendments are to be made at the Accounts Payable stage (do not amend the original order).

- account code
- price

Amendment	Cancel line	Cancel order	Adding instruction or note of *Confirmation Order*
Revised PO value within approval limit Revised PO value outside approval limit	**Submit** the cancellation and the order status will be Approved, Reserved	Status will automatically change to 'Cancelled'	**Submit** the change and the order status will be Approved, Reserved Forward for approval

> **Pre-requisites:** You must find the order. If you do not know how to search for an order then refer to the separate guidance notes: *Buyers Work Centre: Searching.*

Adding an instruction to an already raised order or indicating it's a confirmation order

If you need to add an instruction to an already approved Non-Catalog order once it has printed then you can do this via the Buyers Work Centre. This will print out at the top of the order in the instruction box.

1. First find then **Select** the radio button for the order you wish to add the instruction to.

2. Navigate to the **Select Order** field, which should default in with **Update** and click **Submit**.

3. The *Update Standard Purchase Order* screen displays.

4. Complete the **Note to Supplier** field.

5. Click **Save.**

6. If relevant you can indicate whether this is a confirmation order by amending the drop down list at the top of the order header.

7. The status of the purchase order will now be **Requires Re-approval, Reserved**.

8. If you have sufficient approval authority, click **Submit** and the order status will change back to **Approved.**

9. If you don't have sufficient authority, you will need to click on **Approval Options.** In the **Approval Path** field enter the **Surname** of the colleague you are forwarding the order to for approval and **Tab,** the name of your colleague will either default in or you may need to **Quick select.** Click **Submit Document.**

10. If a revised order doesn't automatically print once the order status is **Approved** and a copy needs to be sent to the supplier, follow instructions on **Buyers Work Centre: Re-printing orders**.

Amending a tax code

You can amend a tax code on an order that has a status of **Approved**, with a closure status of **Open** and which is **not receipted or matched to an invoice**. If not, the code can be amended at the Accounts Payable stage of processing the invoice.

1. Click on the **order number** that the amendment relates to. This will display the Header screen of the order.

2. Click **Update.**

3. Navigate to **Actions** and amend to **Change Amount, Go** and **Save.**
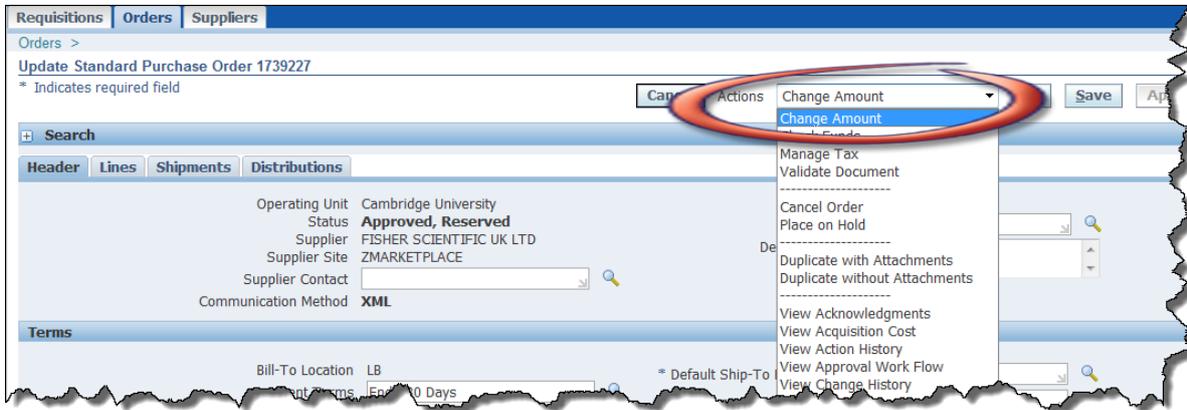
4. Navigate back to **Actions,** select **Manage Tax** and **Go.**

5. Warning message may display asking you to save your work, if so click **Yes.**
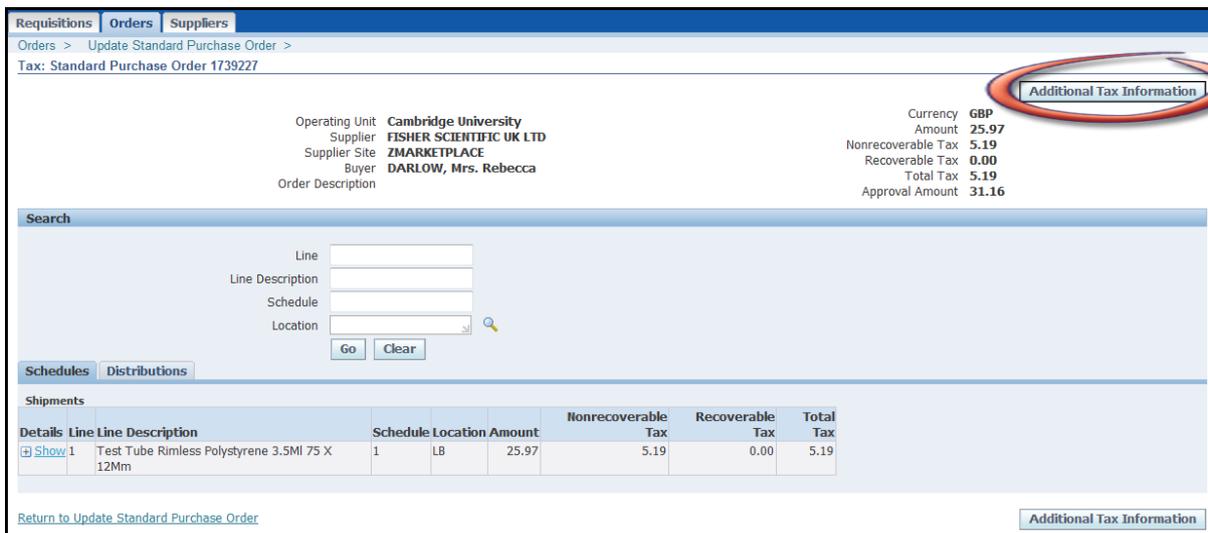
6. Click **Additional Tax Information.**

Requisitions	Orders	Suppliers

Orders >   Update Standard Purchase Order >   Tax: Standard Purchase Order >

Additional Tax Information: Standard Purchase Order 1739227

* Indicates required field

Cancel   Apply

Legal Entity Name **Cambridge University**
Taxation Country United Kingdom ⓘ

Tax Determining Factors for Lines

⊞ Search

Line	Description	Shipment	Location	Tax Classification	Product Type	
1	Test Tube Rimless Polystyrene 3.5Ml 75 X 12Mm	1	LB	SR20.0%	GOODS	

Cancel   Apply

7. Amend the code accordingly by deleting the incorrect code and either manually typing in the code e.g. ME and use % to assist searching or use the magnifying glass.

8. Click **Apply** and the *Tax* screen will display and the Non-recoverable, Recoverable and Total Tax fields will amend accordingly.

Schedules	Distributions

Shipments

Details	Line	Line Description	Schedule	Location	Amount	Nonrecoverable Tax	Recoverable Tax	Total Tax
⊞ Show	1	Test Tube Rimless Polystyrene 3.5Ml 75 X 12Mm	1	LB	25.97	0.00	0.00	0.00

9. Click **Return to Update Standard Purchase Order.**

10. Click **Submit.** The order status will be 'Approved' with a closure status of 'Open'.

11. If needed, you can the re-print the order and send it to the supplier. Refer to the separate guidance on *Buyers Work Centre: Re-printing Orders*. No amendments will submit electronically.

Tracking an item as a fixed asset

1. Click on the relevant **order number** to display the order Header screen.

2. Click **Update.**

3. Navigate to **Distributions** tab and click on the **Pencil icon** for the relevant line.

4. In the *Details* section complete the **Track as Asset** field with a **Y**.

5. Click **Apply.**

6. A confirmation message will display, you must click **Save** for the changes to be confirmed. The order status will be **Approved, Reserved.**

Cancelling an order line

This process can be carried out as long as the item has <u>not been</u> receipted or matched to an invoice. Contact the supplier, unless they contacted you, to advise that the product is not required and upon confirmation proceed to cancel the line in UFS.

1. Find the purchase order for the line you wish to cancel and make note of the PO number.

2. Click the **Lines** tab and in the **Add Another** list select **Order** and click **Add.**

3. Enter the **PO number** in the **Order** field and click **Go.** The lines of the PO will display.

4. Click the **Select** button for the line you wish to cancel.

5. In the **Select Line** drop down box select **Cancel** and click **Go.**
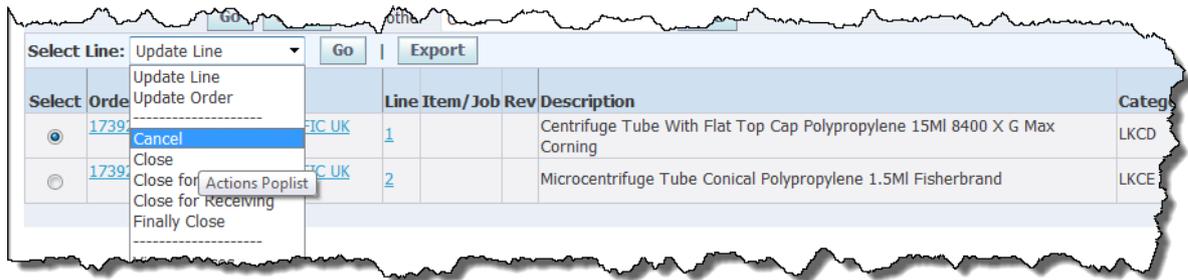
6. A cancel line screen displays with a warning message advising that the action cannot be reversed.

7. Complete the **Reason** and **Note to Supplier** field.

8. If the item was from the Marketplace then the communication method will default in as **XML**. However, amendments to Marketplace orders will not transmit directly to the supplier, the order will need to be reprinted and either scanned and emailed, or faxed.

   If it was a non-catalog item then the communication method will default in as **None**. Amend to **Print** if need-be.

   Email function is not yet active so please do not use.

9. The **Cancel Requisition** field defaults in as **Yes,** which should remain as this.

10. Click **Apply**.

11. The **Line** screen will display, the amount will be zero with a status of cancelled. Make note of the purchase order number and click on **Clear.**

12. Click on the **Headers** tab and enter the order number into the **Order** field and click **Go.**

13. The status of the order will be **Requires Reapproval**.

14. In the **Select Order** field ensure it states **Update** and click **Submit.** This will display the order on the screen.

15. Click on the **Submit** button regardless of your limit and this should submit your cancellation and update the status to **Approved.**

16. Re-print the order and send a copy to the supplier to confirm the cancellation. (Refer to separate detailed document)

If you re-queried the PO by clicking on the number, and then the Lines tab, you will see that the line quantity is zero as well as the amount. If you want to know why it was cancelled you can click on the details icon and if a note to the supplier was entered at the cancelled stage it would display in the Notes section on the screen.

Cancelling an order

You can cancel an order up to the time the item/service has been receipted in CUFS. If receipting has taken place then the item/service will need to be returned to enable this process to be followed. Contact the supplier, unless they contacted you, to advise that the product is not required and upon confirmation proceed to cancel the line in CUFS.

1. From the **Orders** tab, find and **Select** the order you wish to cancel.

2. Amend the **Select Order** drop down list to **Cancel** and click **Submit.**

   A warning message advises that the action cannot be reversed.

3. The **Cancel Standard Purchase Order** screen displays.

4. Complete the **Reason** and **Note to Supplier** field.

5. **Non-Catalog Communication Method** is **None.** Amend to **Print** and it will print from the set-up of the person cancelling the document as long as it was completed in Personal Profiles.

   Communication for Marketplace is **XML.** However, it will not transmit directly and you will need to print and send it to supplier.

6. Ensure the **Cancel Requisition** remains as **Yes.**

7. Click **Apply.** The status will be **Cancelled** and the closure status will be **Closed**.

8. The order will now require reprinting and faxing or emailing to the supplier as confirmation.

Finally closing a purchase order

After reviewing the open purchase order report it may be necessary to Finally Close a purchase order or purchase order line. This ensures that the commitment of funds is removed. You can only Finally Close an order when it has a status of Approved, cancelled or closed. However, please use Finally Close with caution!

> **Note –** Finally Closing prevents any further transactions from being processed against the PO. If you are still expecting an invoice, e-Invoice or credit note to be matched to a PO **do not use Finally Close**.

1. Go to **Buyers Work Centre** and find the order you wish to finally close.

2. Navigate to the **Select Order** field, which defaults in with Update. Click on the **drop down list** and select **Finally Close**.

3. Click **Submit** and the **Finally Close Standard Purchase Order** screen displays with a warning message.

4. Enter a **Reason** and then click on **Apply.**

5. The **Orders** screen displays again and the **Status** of the order is **Finally Closed.**

Finally Closing a PO line

Note – Finally Closing prevents any further transactions from being processed against the PO. If you are still expecting an invoice, e-Invoice or credit note to be matched to a PO **do not use Finally Close**.

1. Find the purchase order via the Buyers Work Centre that has the line that is to be finally closed and make note of the PO number.

2. Click on the **Lines** tab.

3. Navigate to **Add Another** field and from the drop down list select **Order**, then click **Add**.

4. Complete the **Order** field with the PO Number.

5. Click **Go** and all lines of the purchase order will display.

6. Ensure you click the **Radio Button** for the correct line.

7. Navigate to the **Select Line** field and from the drop down list select **Finally Close**.

8. Click **Go**.

9. The Finally Close Line 1 screen displays, where you enter the reason for Finally Closing the line.

10. Click **Apply**.

11. The **Lines** tab will display with the lines of the order and the relevant line will have a status of **Finally Closed**.