Amending the coding on an approved PO

Pre-requisites

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

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

Amending the account coding on an approved, but unreceipted, order

1. Amend the code on the Purchase Order by adding in a new line to the PO.
2. Approve the revised PO if within your limit or forward to a colleague for approval.
3. Cancel the original line that had been coded incorrectly.

**Step 1: Amend the code**

1. Go to the **Buyers Work Centre > Orders** and search for the required PO (Select **New Search** if appropriate). Select **Go** to run search.

2. Ensure that your selected PO is **Open** and **unmatched** and that **Update** is selected, then **Submit**.

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Version: 2.0
05 November 2021
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

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**Orders:**

Update Standard Purchase Order 3414976

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**Operating Unit:** Cambridge University

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**Add Lines:**

- From Catalog
- Go
- From Excel
- Add

**Line:**

<table>
<thead>
<tr>
<th>Line</th>
<th>Type</th>
<th>Item/Job</th>
<th>Description</th>
<th>Category</th>
<th>Qty Unit</th>
<th>Price</th>
<th>Amount</th>
<th>Need-By/Start Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Goods</td>
<td>Microscope</td>
<td>LCO</td>
<td></td>
<td>1 EA</td>
<td>200</td>
<td>200.00</td>
<td>03-Nov-2021 00:00:00</td>
<td></td>
</tr>
</tbody>
</table>

**Update with Excel**

- **Distribution Type:**
- **Deliver-To:**
- **Qty Unit:**
- **Price:**
- **Amount:**
- **Need-By/Start Date:**
- **Actions:**

**Next click on the yellow pencil icon for the copied line**

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**Changing from GL to GL:**

Overtype the relevant field(s)

**Changing from GL to Project:**

First delete the GL code information on the left, then complete the Project fields on the right

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**Click Apply.** Once the confirmation message appears, select **Save** to confirm the change
End of Step 1

**Step 2: Approval of revised PO**

Depending on your approval limit - if the total PO value is

<table>
<thead>
<tr>
<th>Within your approval limit:</th>
<th>Over your approval limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select <strong>Submit</strong>, the PO status updates to <strong>Approved, Reserved</strong>.</td>
<td>Select <strong>Approval Options</strong>, then</td>
</tr>
<tr>
<td>Move to Step 3</td>
<td>Enter your <strong>Dept. Code</strong> into the <strong>Approval Path</strong> and search using Tab key or the icon</td>
</tr>
<tr>
<td></td>
<td>Select the <strong>XX_PURCHASING</strong> option for your Department code</td>
</tr>
<tr>
<td></td>
<td>The <strong>Approver</strong> box appears. Type in the surname of your approver and choose the correct person from the list</td>
</tr>
<tr>
<td></td>
<td>Add any necessary notes in the text boxes then <strong>Submit Document</strong>. A confirmation message appears stating PO has been submitted for approval</td>
</tr>
<tr>
<td></td>
<td>Move to Step 3</td>
</tr>
</tbody>
</table>

**Step 3: Cancel the original line from the PO**

Once the PO is approved you need to follow the **Cancel PO Line(s)** procedure in the **Buyers Work Centre > Orders**.

1. Select the **Lines** tab, and using **Add**, choose the **Order** field options from the dropdown list
2. Enter the original PO number in the **Order** field > select **Go**
3. **Select** the original line to cancel – caution here as lines may not be in order
4. From the **Select Line** dropdown choose **Cancel > Go**
5. Provide the reason why this line is being cancelled > **Apply**

Check the PO **Status** in the Header tab shows **Approved**. However, if it shows **Requires Reapproval** you need to **Update** the order, choose **Approval Options** and forward to an appropriate Approver as in Step 2 (over limit) above.