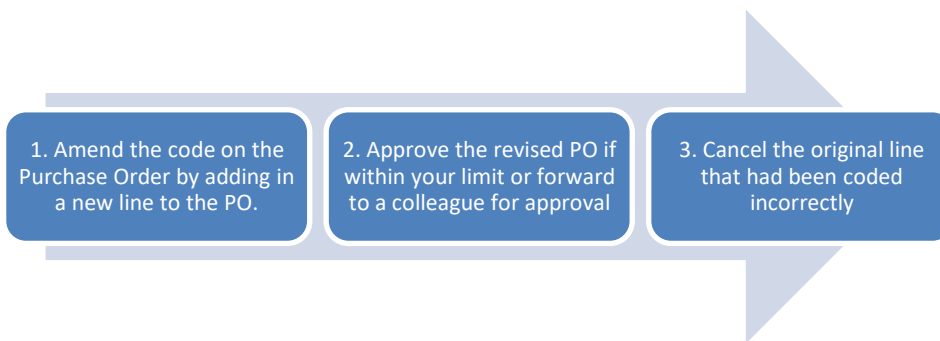# Amending the coding on an approved PO

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** ①and that **Update** ② is selected, then **Submit** ③

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

Orders >
Update Standard Purchase Order 4024038

* Indicates required field

☑ TIP To change tax go to Actions > Change amount > Go then Manage Tax > Go

▶ **Search**

**Header | Lines | Shipments | Distributions**

Operating Unit   Cambridge Universit~

Add Lines: From Catalog ▼   Go   Update with Excel | ⊞ •••

* Line	* Type	Item/Job	* Description	* Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions
1	Goods ⤫ 🔍		Coffee	CAOG ⤫ 🔍	3	EA	10	30.00	31-Oct-2024 00:00:00	✏ 📋 🗑

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

Header Lines Shipments **Distributions**

Operating Unit   Cambridge University   Status   Approved, Reserved   60.00   GBP

Update with Excel | •••

Line	Shipment	Line Description	* Distribution	Type	Deliver-To	Qty	Unit	Amount	PO Charge Acct	Destination Subinventory	Activity	Actions
1	1	Coffee	1	Expense	PD	3	EA	30.00	U.PD.PDAA.AAAA.ECAO.0000 Entity.Department.Cost Centre.Source of Funds.Transaction.Spare			✏ 📷 🗑
2	1	Coffee	1	Expense ▼	PD 🔍	3	EA	30.00	U.PD.PDAA.AAAA.ECAO.0000 ⤫ 🔍 Entity.Department.Cost Centre.Source of Funds.Transaction.Spare			✏ 📷 🗑

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

Requisitions Suppliers **Orders**

Orders > Update Standard Purchase Order >
Update Distribution 1 (Standard Purchase Order 4024038)   Cancel Actions Check Funds ▼ Go Previous Distribution Next Distribution **Apply**

Line 2
Shipment 1
Schedule/Pay Item 1

Item
Line Description Coffee
Currency GBP

* Indicates required field

* Quantity 3
Unit EA

Amount 30.00
* Encumbered Date 24-Oct-2024
Reserved No

Delivery

Requester PARKER, Mrs Helen ⤫ 🔍
Deliver-To Location PD ⤫ 🔍

Requisition
Requisition Line

Billing

PO Charge Account U.PD.PDAA.AAAA.ECAO.0000 ⤫ 🔍
Entity.Department.Cost Centre.Source of Funds.Transaction.Spare

PO Accrual Account 0.00.0000.0000.VEAA.0000
Entity.Department.Cost Centre.Source of Funds.Transaction.Spare

PO Budget Account U.PD.PDAA.AAAA.ECAO.0000
Entity.Department.Cost Centre.Source of Funds.Transaction.Spare

PO Variance Account U.PD.PDAA.AAAA.ECAO.0000
Entity.Department.Cost Centre.Source of Funds.Transaction.Spare

Project ⤫ 🔍
Task 🔍
Award
Expenditure Type 🔍
Expenditure Org 🔍
Expenditure Item Date

Details

9 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

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

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.