

# 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 amended during invoice processing.

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



### Step 1: Amend the code

	Search			
	Match 🖲 All 🔿 Any			
. Go to the <b>Buvers Work Centre &gt; Orders</b> and	Order is v 4024038 y Q			
accurate for the required DO (Calact New)	Supplier is V	⊿ ⊄		
search for the required PO (Select New	Approval Status is			
Search if appropriate). Select Go to run	Go Clear Add Another Acknowledgment	✓ Add		
search	Select Order: Update V Submit   Export   •••			
Search	$\label{eq:select} \textbf{Select} ~ \textbf{OU} \bigtriangleup ~ \textbf{Order} \bigtriangleup ~ \textbf{Rev} ~ \textbf{Description} \bigtriangleup ~ \textbf{Supplier} \bigtriangleup$			
	4024033 0 OFFICE DEPOT INTERNATIONAL	(UK) LTD T/A VIKING		
	O 4024032 0 OFFICE DEPOT INTERNATIONAL	(UK) LTD T/A VIKING		
	O 4024030 0 SCIENTIFIC LABORATORY SUPPL	JES LTD		
	O 4024029 0 APPLETON WOODS LTD			
. Ensure that your selected PO is <b>Open</b> and <b>unr</b>	natched 1 and that Update 2 is			
selected, then <b>Submit</b>				



## 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   •••													
Li	ne Shipm	nt Line Description	* Distribution	Туре	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			/ K 1	
2	1	Coffee	1	Expense 🗸	PD J Q	3	EA	30.00	U.PD.PDAA.AAAA.ECAO.0000 🚽 Q		8	/ 2 1	

### Changing from GL to GL:

8

Requisitions Suppliers Orders

### Changing from GL to Project:

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

Orders > Update Standard Purchase Order >					- F
Undate Distribution 1 (Standard Pur	chase Order 4024038)				_
opdate Distribution (Otandard Full	chase Order 40240307		Cancel Actions Check Funds V	Go Previous Distribution Next Distrib	utio
	Line 2	Item			
5	hipment 1	Line Description	Coffee		
Schedule/	Pay Item 1	Currency	GBP		
* Indicates required field					
*,	Quantity 3	Amount	30.00		
	Unit EA	* Encumbered Date	24-Oct-2024 Kb		
		Beenved	No		
		NG361464	10		
Delivery					
F	equester PARKER, Mrs Helen 🔄 🔍	Requisition			
Deliver-To	Location PD y 9	Requisition Line			
Billing					
PO Charne	Account U.PD.PDAA.AAAA.ECAO.0000 🚽 🤤	Project	⊔ Q,	1	
1 o churge	Entity.Department.Cost Centre.Source of Funds.Transaction.Spare	Task	Q,		
PO Accrua	U.00.0000.0000.VEAA.0000	Award			
104000	Entity.Department.Cost Centre.Source of Funds.Transaction.Spare	Expenditure Type	0.	1	
PO Budge	U.PD.PDAA.AAAA.ECAO.0000 Account	Expanditure Ora	0	1	
10 500800	Entity.Department.Cost Centre.Source of Funds.Transaction.Spare	Expenditule org	4	1	
PO Variance	U.PD.PDAA.AAAA.ECAO.0000	Expenditure Item Date		1	
	Entity.Department.Cost Centre.Source of Funds.Transaction.Spare			1	
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:	<b>Over</b> your approval limit
Select <b>Submit</b> , the PO status updates to <b>Approved, Reserved</b> .	Select Approval Options, then
Move to Step 3	Enter your <b>Dept. Code</b> into the <b>Approval Path</b> and search using Tab key or the icon
	Select the <b>XX_PURCHASING</b> option for your Department code
	The <b>Approver</b> 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 <b>Submit Document.</b> 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.