

# HOW TO ENTER A CHANGE ORDER

You can modify an existing Purchase Order in eFinance for the following reasons:

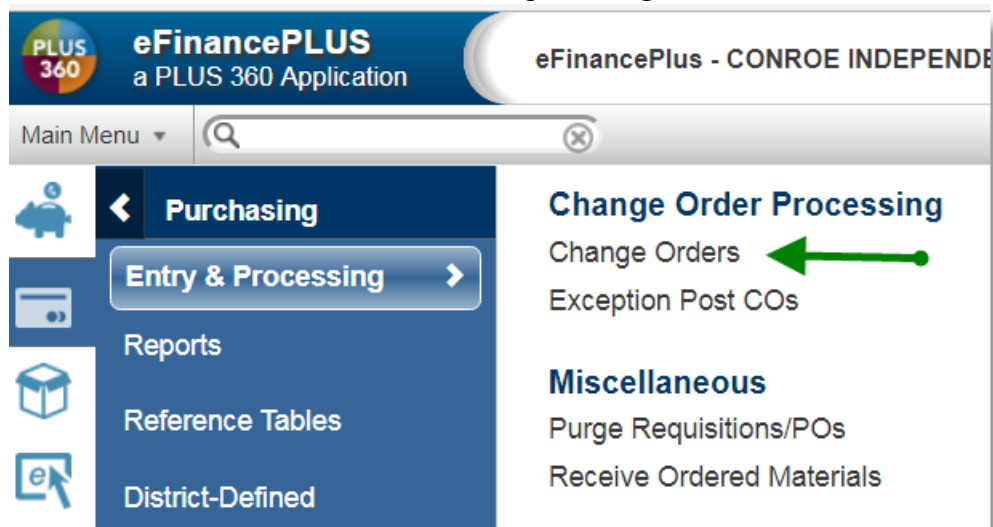
- Quantity increase or decrease


- Price increase or decrease


- Budget code change

- \* To add a line – you must complete and submit the **PO Change Request Form** located On Purchasing- Internal/ Forms

1. In eFinancePlus, click on Main Menu/ Purchasing/ **Change Orders**



2. Click on the Add New Icon  in top left menu bar

3. Type the Purchase Order Number in the field and click  to populate the screen.

Date: 02/07/2018 Period: 6/18

**General**

Purchase Order \* 38014484 Change

Status

Change

DEPARTMENT

☐ Blanket ☐ Contract ☐ Confirming

4. You will see the original Purchase order details on the Change Orders screen as shown below.

**Approval Status**

Date: 02/07/2018 Period: 6/18

**General**

Purchase Order \* 38014484 Change 1 ☒ Continuous

Status C - Complete

Change 02/07/2018

DEPARTMENT 727 - FINANCE OFFICE

☐ Blanket ☐ Contract ☐ Confirming

**Vendor** **Delivery**

**Vendor Information**

Vendor 00005884

Issued 02/07/2018



Required

Expires

**Vendor Address**

GUARDIAN REPAIR & PARTS  
2210 PEPPERMILL  
HOUSTON TX 77080

Change	Item	Description	Quantity	Unit Price	Total Price	BUDGET UNIT
	1	SANITAIRE SC684 VACUUM CLEANER, COM	6.00	140.0000	840.00	6537810001699000

5. Highlight the line you need to change and Click  again to get to the **Change Orders Detail Screen**. The PO line number is shown in small box next to the PO # and before the Continuous. Make sure the line you need to change is listed.
6. To **Change the Quantity (increase or decrease)**, enter the amount of the adjustment in the Quantity Adjustment field and then Tab to next field. Example: type (1) to increase QTY to a total of 7 (original QTY is 6) or type (-1) to decrease the QTY to a total of 5. The Total Adjustment will auto-populate. Type that same amount in the Charging Information Amount and then click . See notes in red below

**eFinancePLUS**  
a PLUS 360 Application

Change Orders Detail - CONROE INDEPENDENT SCHOOL DISTRICT

Insert Row Delete Row

Date: 02/07/2018 Period: 6/18

**General**

Purchase Order 38014484 1 ☒ Continuous

Change 1

Commodity 350-001

**Pricing Adjustments**

Quantity Adjustment -1.00

Price Adjustment 0.0000

New Extended 700.00

Trade-in/Discount 0.00

Shipping Adjustment 0.00

Tax Adjustment 0.00

New Total 700.00

Total Adjustment -140.00


**Charging information**

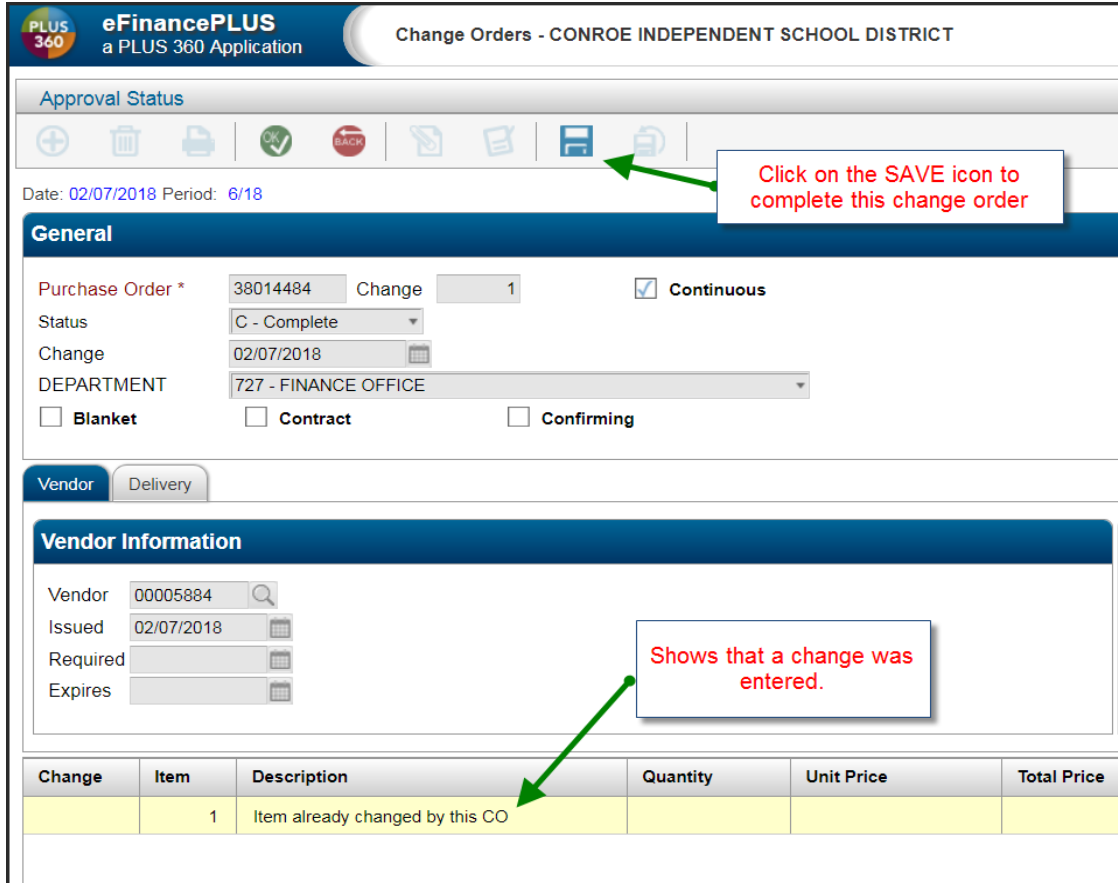
BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
6537810001699000	6315			840.00	-140.00

Type the QTY decrease (-1) in this field and Tab or hit Enter to move to next field

The Total Adjustment field will populate with the \$ decrease

Type the amount in the Total Adjustment field here and click OK

7. Once you type the \$ amount in the Charging Information and click  , it will go to next line or back to the Change Order screen as shown below. Click on the **SAVE** icon to complete the change order.



**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

Change Orders - CONROE INDEPENDENT SCHOOL DISTRICT

Approval Status

Date: 02/07/2018 Period: 6/18

**General**

Purchase Order \* 38014484 Change 1 ☒ Continuous

Status C - Complete

Change 02/07/2018

DEPARTMENT 727 - FINANCE OFFICE

☐ Blanket ☐ Contract ☐ Confirming

**Vendor** **Delivery**

**Vendor Information**


Vendor 00005884

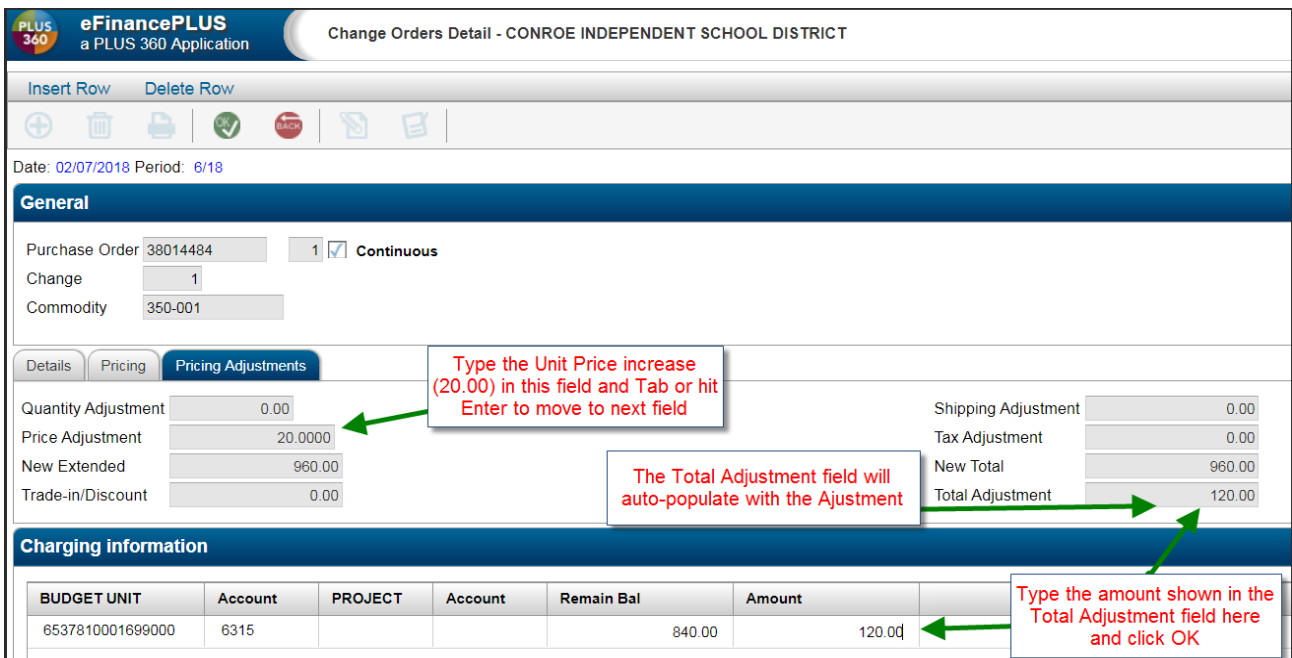
Issued 02/07/2018

Required

Expires

Change	Item	Description	Quantity	Unit Price	Total Price
1	1	Item already changed by this CO			

8. To **Change the Price (increase or decrease)**, enter the amount of the adjustment in the Price Adjustment field and then Tab to next field. Example: type (20.00) to increase the unit price to \$160.00 (original price is \$140.00) or type (-20.00) to decrease the unit price to \$120.00. The Total Adjustment will auto-populate. Type that same amount in the Charging Information Amount and then click . See notes in Red below.



**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

Change Orders Detail - CONROE INDEPENDENT SCHOOL DISTRICT

Insert Row Delete Row

Date: 02/07/2018 Period: 6/18

**General**

Purchase Order 38014484 1 ☒ Continuous

Change 1

Commodity 350-001

**Details** **Pricing** **Pricing Adjustments**

Quantity Adjustment 0.00

Price Adjustment 20.0000

New Extended 960.00

Trade-in/Discount 0.00

Shipping Adjustment 0.00


Tax Adjustment 0.00

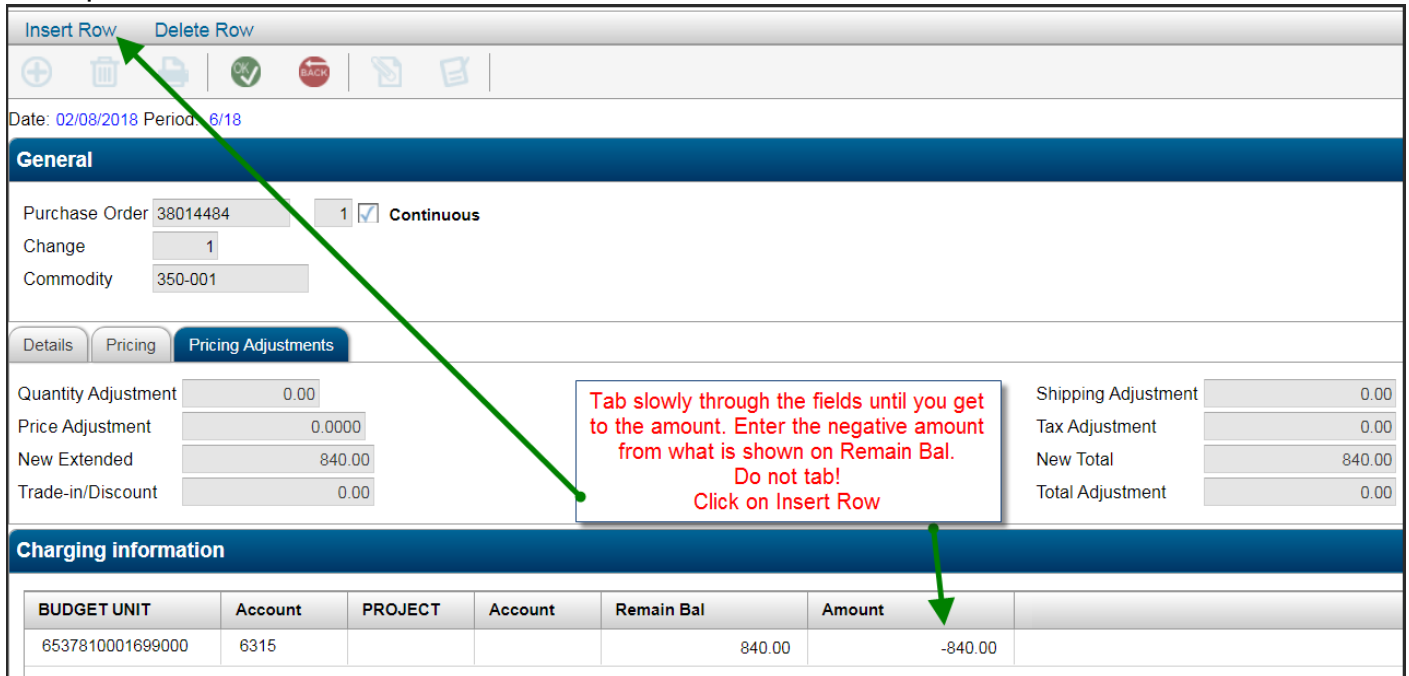
New Total 960.00

Total Adjustment 120.00

**Charging information**


BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
6537810001699000	6315			840.00	120.00

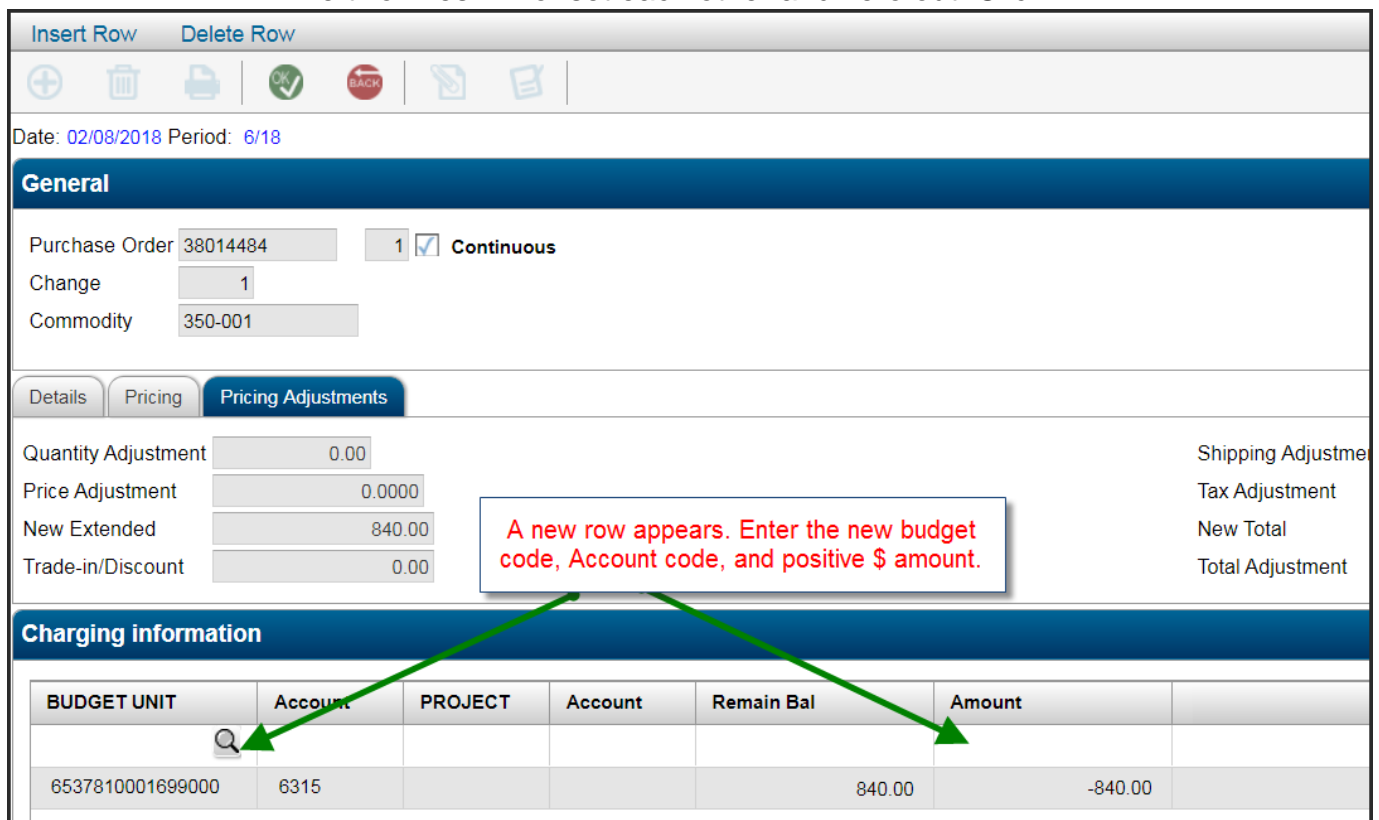
9. Once you type the \$ amount in the Charging Information and click  , it will go to next line or back to the Change Order screen. Click on the SAVE icon to complete the change order.
10. To **Change the Budget Code**: Tab slowly through the fields without changing any information until you get to the Amount under the Charging Information Tab. Enter a negative amount. Example below: Remain Bal is \$840 so I enter -840. Do not tab or hit enter. Click on Insert Row in the top menu to add a row.



The screenshot shows the 'Charging information' section with a table containing one row. A red callout box with the text 'Tab slowly through the fields until you get to the amount. Enter the negative amount from what is shown on Remain Bal. Do not tab! Click on Insert Row' has an arrow pointing to the 'Amount' field in the table.

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
6537810001699000	6315			840.00	-840.00

A new row will appear as shown below. Type in the new budget code, account code, and \$ amount. The two lines will offset each other and zero out. Click .



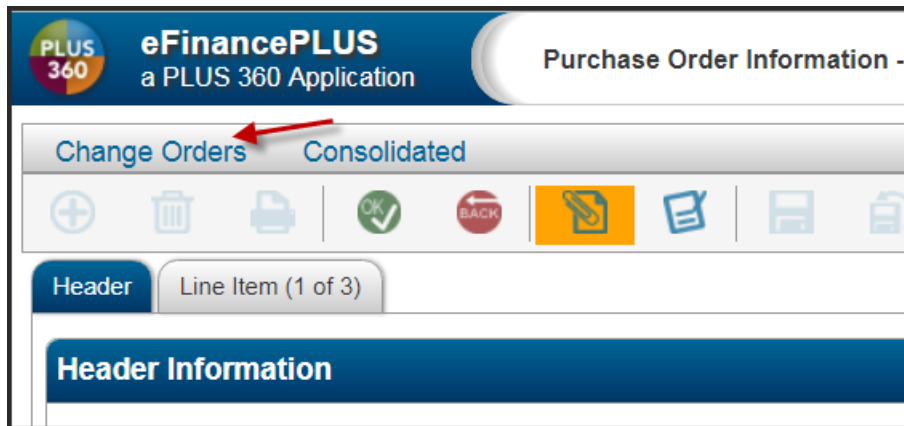
The screenshot shows the 'Charging information' section with a table containing two rows. A red callout box with the text 'A new row appears. Enter the new budget code, Account code, and positive \$ amount.' has two arrows pointing to the 'BUDGET UNIT' and 'Amount' fields of the new row.

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
6537810001699000	6315			840.00	-840.00

You can repeat this process with each line you wish to change a budget code on. Once you have completed a budget code change for each line, click on the SAVE icon to complete the change order.

11. The Change Order is now ready for the Principal or Directors' approval. The steps would be: Applications/Purchasing/Change Order Processing and Approve/Deny Change Orders

**Note:** You can see when the change order is **approved and processed** by going into the Purchase Order Listing, entering the PO # and click OK twice. If a Purchase Order has a completed Change Order, the top menu will show Change Orders as shown below:



You can click on this menu tab and view the Change Date and Line.

### **TO ADD A LINE TO A PURCHASE ORDER**

The “add a line” change orders are done by completing the **PO Change Request Form** located on Purchasing- Internal/ Forms website and sending it to the email listed for processing by the Purchasing Department.

## Quick Reference

### To Change Quantity



New

Enter PO number



QTY Adjustment: enter number + or –

Total Adjustment: auto-fill

In Charging Information Amount:

type same amount as Total Adjustment field



Save

### To Change Price



New

Enter PO number



QTY Adjustment: 0

Price Adjustmet: type increase or decrease

Total Adjustment: auto-fill (will be same as Price Adjustment)

In Charging Information Amount:

type same amount as Total Adjustment field



Save

### To add a line

you must complete and submit the **PO Change Request Form** located at Purchasing- Internal/ Forms