

HOW TO ENTER A CHANGE ORDER

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

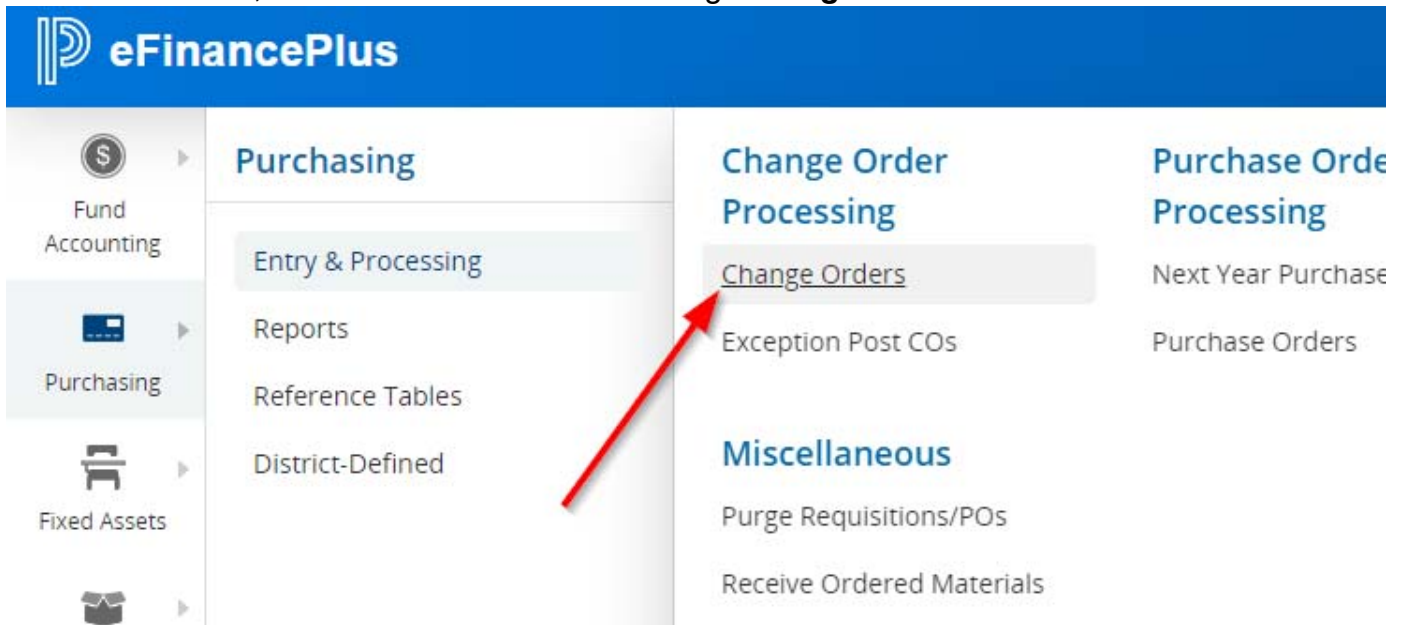
Quantity increase or decrease

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.

A screenshot of the 'Change Order' entry screen in eFinancePlus. At the top, there's a toolbar with icons for Add New, Delete, Print, OK (highlighted with a red arrow), Cancel, and others. Below the toolbar, the date is set to '07/05/2022' and the period is '11/22'. The 'Search Criteria' section contains several fields: 'Purchase Order' (with the value '42026280'), 'Change', 'Status' (with a dropdown arrow), 'Change Date' (with a calendar icon), and 'Issued' (with a calendar icon). To the right of these fields are labels for 'Description', 'Vendor', 'Buyer', 'Attention', and 'Ship To', each followed by an input field. A red box highlights the 'Purchase Order' field and the 'OK' button, with the text 'Type the Purchase Order number and click OK' inside.

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

Approval Status



Date: 07/05/2022 Period: 11/22

General

Purchase Order * Change ☒ Continuous
 Status
 Change
 DEPARTMENT
☐ Blanket ☐ Contract ☐ Confirming

Vendor Delivery

Vendor Information

Vendor
 Issued
 Required
 Expires

Vendor Address

B&H PHOTO VIDEO
 420 NINTH AVENUE
 NEW YORK NY 10001

Change	Item	Description	Quantity	Unit Price	Total Price	BUDGET UNIT	Account	App
1	QUOTE # 893938910		1.00	232.0300	232.03	19921100004511000	6317	O

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

Insert Row Delete Row

Date: 07/05/2022 Period: 11/22

General

Purchase Order ☒ Continuous

Change

Commodity

Details Pricing **Pricing Adjustments**

Quantity Adjustment Type the QTY decrease (-1) in this field and TAB to move to the next field

Price Adjustment

New Extended

Trade-in/Discount

Shipping Adjustment

Tax Adjustment


New Total

Total Adjustment The TOTAL ADJUSTMENT field will auto populate with the \$ decrease

Charging information

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
1992110004511000	6317			232.03	-232.03

Type the amount shown 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.

Approval Status

Date: 07/05/2022 Period: 11/22

General

Purchase Order * Change ☒ Continuous

Status

Change

DEPARTMENT

☐ Blanket ☐ Contract ☐ Confirming

Vendor Delivery

Vendor Information

Vendor


Issued

Required

Expires

Change	Item	Description	Quantity	Unit Price	Total
1	QUOTE # 893938910		1.00	232.0300	

This field will show ITEM ALREADY CHANGED BY THIS CO when completed

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.

Change Orders Detail - CON2011_Live

Insert Row Delete Row

Date: 07/05/2022 Period: 11/22

General

Purchase Order ☒ Continuous

Change

Commodity

Pricing Adjustments

Quantity Adjustment

Price Adjustment

New Extended

Trade-in/Discount

Shipping Adjustment

Tax Adjustment

New Total


Total Adjustment

Charging information

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
1992110004511000	6317			232.03	20.00

Red Annotations:

- Type the Unit Price increase in this field and TAB to move to the next field (points to Price Adjustment)
- The Total Adjustment field will auto populate with the adjustment amount (points to Total Adjustment)
- Type the amount shown in the Total Adjustment field here and click OK (points to Amount field in Charging information table)

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.

[Insert Row](#) [Delete Row](#)



Date: 07/05/2022 Period: 11/22

General

Purchase Order ☒ Continuous
Change
Commodity

Details Pricing Pricing Adjustments


Quantity Adjustment	<input type="text" value="0.00"/>	Shipping Adjustment	<input type="text" value="0.00"/>
Price Adjustment	<input type="text" value="0.0000"/>	Tax Adjustment	<input type="text" value="0.00"/>
New Extended	<input type="text" value="232.03"/>	New Total	<input type="text" value="232.03"/>
Trade-in/Discount	<input type="text" value="0.00"/>	Total Adjustment	<input type="text" value="0.00"/>

Charging information

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
1992110004511000	6317			232.03	-232.03

Tab slowly through the fields until you get to the amount.
Enter the negative amount from what is shown on
remaining balance. DO NOT TAB! Click on Insert Row

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 .

[Insert Row](#) [Delete Row](#)



Date: 07/05/2022 Period: 11/22

General

Purchase Order ☒ Continuous
Change
Commodity

Details Pricing Pricing Adjustments

Quantity Adjustment	<input type="text" value="0.00"/>	Shipping Adjustment	<input type="text" value="0.00"/>
Price Adjustment	<input type="text" value="0.0000"/>	Tax Adjustment	<input type="text" value="0.00"/>
New Extended	<input type="text" value="232.03"/>	New Total	<input type="text" value="232.03"/>
Trade-in/Discount	<input type="text" value="0.00"/>	Total Adjustment	<input type="text" value="0.00"/>

Charging information

BUDGET UNIT	Account	PROJECT	Account	Remain Bal	Amount
1992110004511000	6317			232.03	-232.03

A new row appears. Enter the new
budget code, account code, and
positive \$ amount

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.