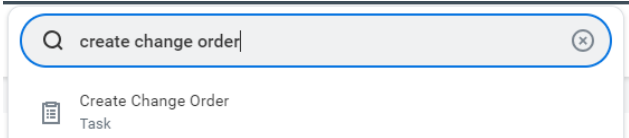


Procurement: Create Change Order on Issued Purchase Order (PO)

Audience / Role	Employee As Self
Description	This job aid provides instructions to create a change order for an issued Purchase Order (PO)
Before You Start	Purchase Order needs to be in Issued status

Create Change Order on Issued Purchase Order (PO)

1	In the Search bar, enter Create Change Order. In the search results, select the Create Change Order task. 
2	Under Create Change Order , in the Purchase Order to Change field, select the purchase order to change.
3	Under Create Change Order, enter the following into the fields: • Reason – Select the reason for the change. • Comment – Enter additional comments as needed.
4	Under Create Change Order, change the following fields: • Summary – Complete as appropriate. • Terms and Taxes – Complete as appropriate. • Contact Information – Complete as appropriate. If this is a direct PO enter a Buyer. • Apply header changes to all lines on Save or Submit – select this checkbox if changes affect all PO lines.
5	Under the Good Lines or Service Lines tab, enter the following into the fields: • Various fields – Change information on existing lines such as quantity and cost (enter in the new total amount). For ad hoc items, you can change the item description, spend category and worktags when no active supplier invoice exists against the line. • Cancel PO Line – Cancel purchase order lines by selecting the check box. • Add additional lines – Add new purchase order lines by selecting the add icon (+) in the first column.
6	Under the Retention Terms tab, enter the following into the fields: • Percent to Retain – Enter percentage to be retained. • Estimated Retention Release Date – Date in which retention release would take place.

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	• 3rd Party Retention – Check box if this applies. • Memo –Can include message if inclined.
7	Under the Prepaid Details tab, enter the following into the fields: • Details: • Has Prepaid Line(s) – check box if purchase order includes prepaid lines. • Prepaid Amortization Type – types to choose from include: ○ Manual ○ Receipt ○ Schedule • Expected Amortization Date – If prepaid amortization type is selected, this is required. • Use Prepaid Spend Account Posting Rules for Receipt Accruals – If prepaid amortization type is selected, checkbox appears.
8	Under the Attachments tab, add attachments. Click Select files>find and click on the file you want to attach>click open>Successfully Uploaded! message displays. To add more than one attachment: Click Upload>find and click on the new file you want to attach>click open>Successfully Uploaded! message displays. To remove an attachment altogether, click the Trash Can icon.
9	Select Submit.

What Happens Next?

- The change order routes to budget manager for review and approval.
- Workday appends a version number to the purchase order number so you and your supplier can track change orders separately from related purchase orders.

Related Reports

- View Purchase Order Changes

Related Job Aids

- Create Purchase Order