# UR Procurement – Create Change Order

| **Instructions** | **Details and Screenshots** |
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| Home page:   * Use the UR logo to return to this Home screen * Use the Search field with keywords * Use the Inbox for Workday messages * Use the Procurement worklet for frequently used tasks and reports | C:\Users\skraynik\AppData\Local\Temp\SNAGHTML196b07be.PNG |
| Rules | * Change Orders can be used to revise the purchase order to:   + Change the FAO. This change will trigger the approval hierachy.   + Increase the value of the purchase order. This change will trigger the approval hierarchy and be sent to purchasing also. * Requisitioners can create a change order for their own purchase orders to resolve:   + Quantity discrepancies. The change order can be used to increase the quantity on the purchase order.     - For example: if you’ve ordered 10 of something and the supplier shipped 15. If you are going to keep the extra 5, you will create a receipt for 15 **and** create a change order to increase the quantity from 10 to 15. This change order will be submitted for approval.   + Price discrepancies. The change order can be used to add additional funds to a purchase order to cover an overbill.     - Once an invoice is applied to a PO line, the unit cost cannot be changed. If there is a unit price discrepancy and purchasing has reassigned the match exception to you in order to initiate a change order, you can use the change order to add a new line with the correct unit cost. |
| * A change order is typically required to resolve a Supplier Account Match Exception. * This reference guide will use the following example:   + PO has a goods-based line for a quantity of 2 (of something)   + Requisitioner created a receipt for 2 when the order came in.   + A few days later, another shipment of 2 arrived   + An invoice was sent to AP for a total of 4. | The requisitioner received the following Supplier Account Match Exception notification in his/her Inbox: |
| * Notice there are two requirements in the notification to the requisitioner   + Not enough receipts   + Quantity discrepancy * In this case, the department wants to keep the extra shipment and instructs the requisitioner to create a Change Order so the invoice can be paid |  |
| * Find the purchase order number within the Supplier Accounts Match Exception notification. It is located in the **Invoice Reference Information** section. * Hover your mouse cursor over the purchase order number and select the **Related Actions** button appears and |  |
| * Select the purchase order number |  |
| * Select the **Related Actions** button next to the purchase order number * Select **Purchase Order** * Select **Create Change Order** |  |
| * Take note of the Help Text at the top of the Change Order screen   + If the Change Order should not be sent to the supplier, such as for internal changes, change the Issue Option to Phone |  |
| * In this case, the goods are already received and invoiced and we don’t want the supplier to ship more; therefore change the **Issue Option** to **Phone**. | now becomes => |
| * Scroll down to the Goods Line area. * Take note of the Quantity area |  |
| * Increase the Quantity Ordered from 2 to 4. * Notice that the Extended Amount automatically updates to the new extended amount. |  |
| * + Add a note in the **Internal Memo** field to explain the change you are submitting | C:\Users\DFLOTT~1\AppData\Local\Temp\SNAGHTML47aaa0e0.PNG |
| * Select <**Submit**> * The Change Order has been submitted for approval. |  |
| * The status of the Purchase Order shows **Change Order In Progress** |  |
| * You can check the status by going to the purchase order and viewing the **Version History** and selecting the *magnifying glass* icon in the Pending Changes area. |  |
| * The requisitioner will still need to **create a receipt** since there is still a supplier accounts match exception in the Inbox for ‘not enough receipts.’ * Follow the Create a Receipt reference guide for help with receipts. |  |