Change Order

User Guide

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CHANGE ORDERS FOR EMALL REQUISITIONS

Once an eMall order has been delivered to a supplier, it may be necessary to issue a change order to modify the terms of the original order. In eVA, you can create a change order using the **Change** button on the current version of the requisition that created the active order.

ORDERS THAT CAN BE CHANGED

Changes can be made to eMall orders in Ordered or Receiving status. Requisitions in other statuses will not display the Change button; other actions must be taken instead to get the order modified.

Modifying Requisitions Created in eMall

Requisition Status	Change Button?	Comment
Composing	No	Edit instead
Submitted	No	Withdraw, then Edit
Approved	No	Withdraw, then Edit
Denied	No	Withdraw, then Edit
Ordered	Yes	Make change
Receiving	Yes	Cannot modify below quantity received
Received	No	Reopen order, then change

A requisition that has not reached Ordered status has not created an order. The requisition can be edited or withdrawn instead.

An order in Received status has been closed. To make changes, you must reopen the order to Receiving status (described below).

Modifying Imported Requisitions

Imported From	Special Condition	Change Button?	Comment
Interface (IRQ:)	Approved in eMall	Yes	Or change in ERP, re-import
	Approvals bypassed	No	Must change in ERP, re-import
Quick Quote (QQ:)		Yes	Make change in eMall
eProcurement (E2E:)	eProcurement suppliers only	No	Make all changes in ADVANTAGE
	eMall supplier included	Yes	Changeable line has Edit button. Other lines must be changed in ADVANTAGE

CHANGES THAT CAN BE MADE

Nearly everything on a purchase order can be changed. See the tables below for restrictions and special situations.

Header Changes

Header Field	Action	Comment
Use PCard	Change	Results in new order (PCO/ DO), not changed order, only if another field is also changed.
Other header field	Change	No restriction

Item Line Changes

Commodity Lines	Action	Comment
New Item Lines	Add	No restriction
Existing Item Lines	Delete	Cannot delete line if already received, or to make total order amount or quantity below zero. Deleted line is NOT sent to vendor; modify to zero instead.
Quantity	Change	Cannot decrease below zero or quantity received, or to make total order amount or quantity below zero.
Price	Change	Non-catalog items only
Unit of Measure	Change	Non-catalog items only
Description	Change	Non-catalog items only
Commodity Code	Change	Non-catalog items only
Other line item fields	Change	No restriction

PROCESSING A CHANGE ORDER

Basic Concepts for Change Orders

To create a change order, the preparer actually processes a change to the Requisition that created the order. Clicking on the **Change** button on requisitions in Ordered or Receiving status opens a new version of a requisition for editing. The new version carries a sequential version number (e.g., V2) following the original requisition number.

Once the new version is ready, it is submitted like any other requisition. Once it passes through the Approval Flow (again, like any other requisition), the new versions of the related orders are created and sent to the suppliers following the same rules and procedures as the original orders.

You can make repeated changes orders. Each new requisition and order will receive the next version number in sequence.)

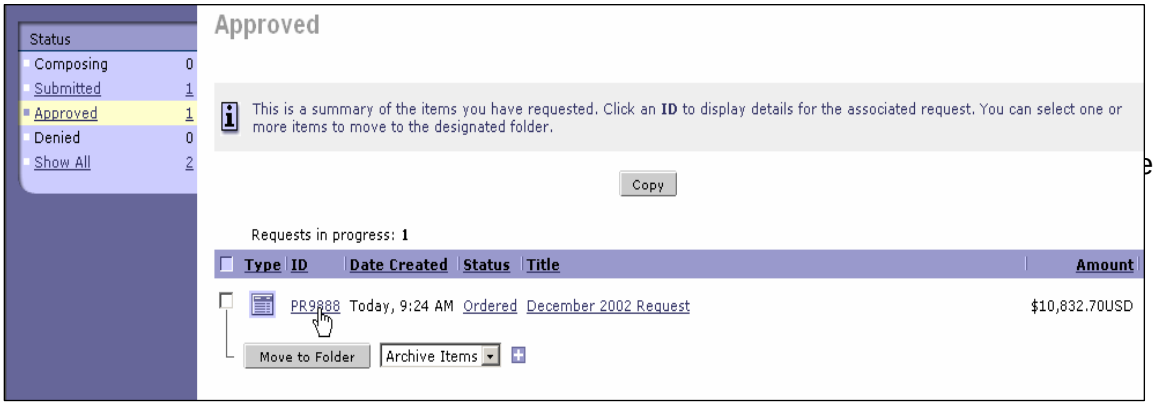
The table below illustrates how a change in requisition PR1234 creates new versions of orders DO456 and DO457 created by the original requisition.

Requisition Change	Related Order	Resulting Active Versions
Any Header Field (except PCard)	DO456, DO457	PR1234V2, DO456V2, DO457V2
Use PCard	DO456, DO457	PR1234V2 DO456 cancel, PCO788, DO457 cancel, PCO789
Any Line 1 Field	DO456	PR1234V2, DO456V2
Any Line 2 Field	DO457	PR1234V2, DO457V2

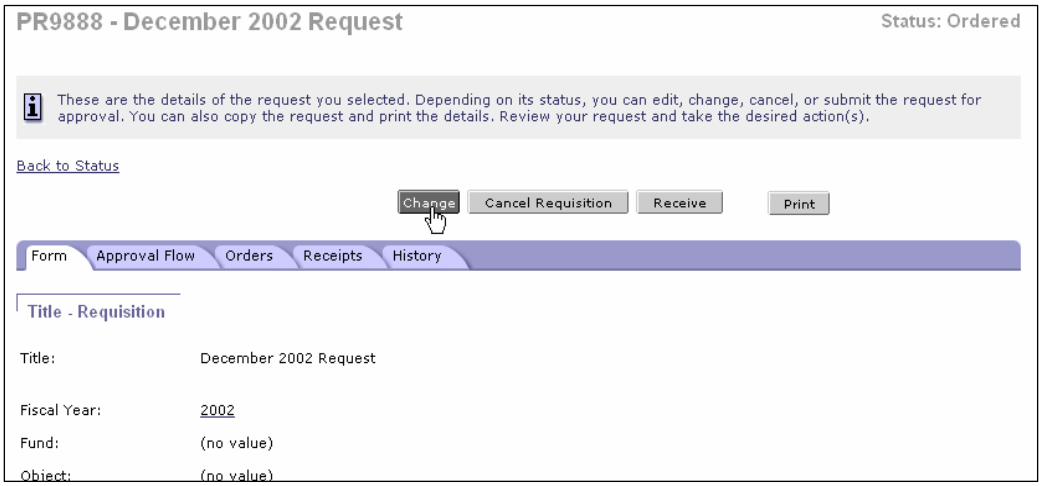
There is a special situation that happens when you change a requisition, approve it, but it has a **Hold Until** date that has not yet passed. The changed requisition remains in Approved status until the **Hold Until** date arrives. As long as the requisition is in Approved status, the previous version of the requisition will remain active and will display on the Status list. Once the **Hold Until** date arrives, the changed requisition will create the new change order, and the previous versions of the requisition and order will both become inactive and will disappear from the Status list.

Steps for Creating a Change Order

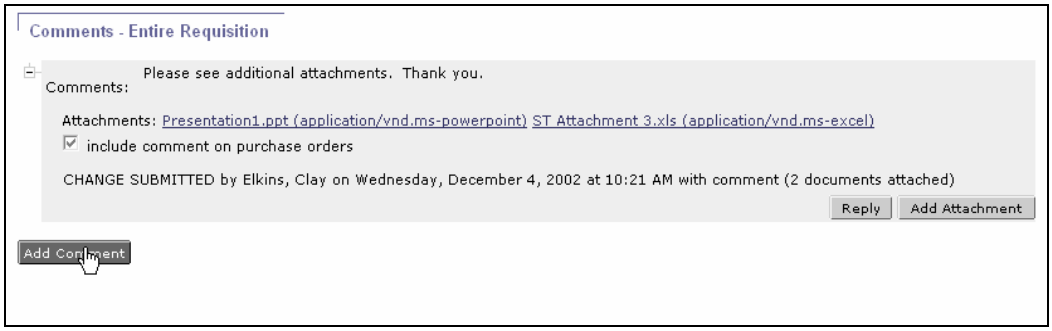
1. If the order to be changed has been fully received, reopen it for receiving (see below).
2. From the list of approved requisitions, or from any other search or history tab listing, open the requisition that created the order to be changed.



3. Select the **Change** button at the top of the requisition. (If the button is not visible, confirm that the requisition is in Ordered or Receiving status.) Clicking on the change button will create a new version of the requisition in Composing status.

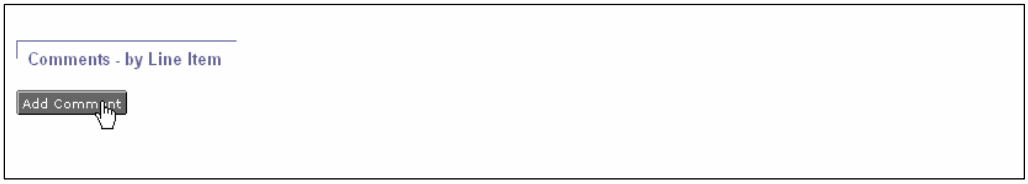


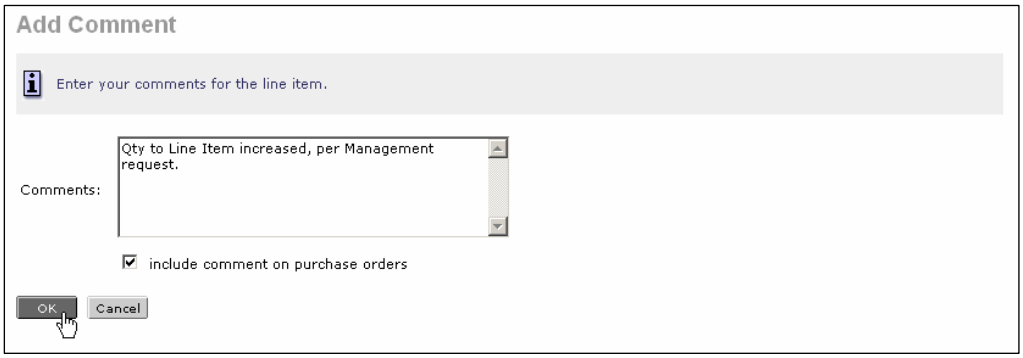
4. Make the desired changes to the new version of requisition.
5. Add a header comment clearly identifying the nature of the changes to the order.



6. Add a line comment for any changed line clearly identifying the nature of the change to the line. Mark the comment to be included on the purchase order.

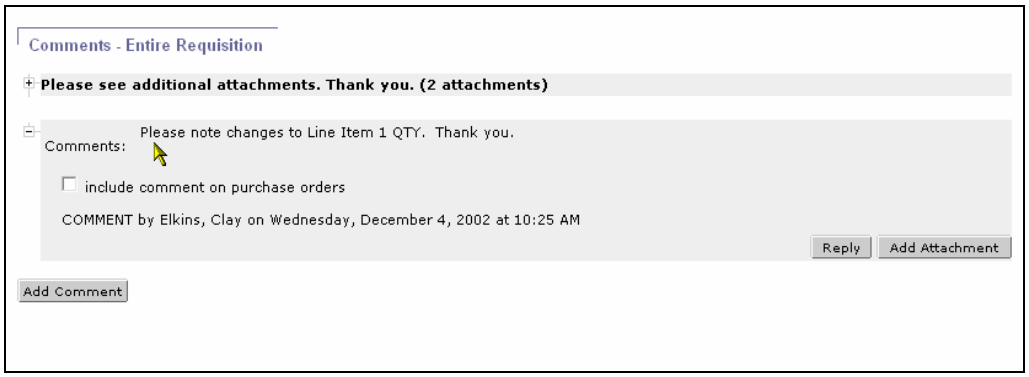
   Important Note: If any line is to be deleted, modify the quantity to zero rather than deleting the line. The vendor does not receive a Change Order when a line is deleted!



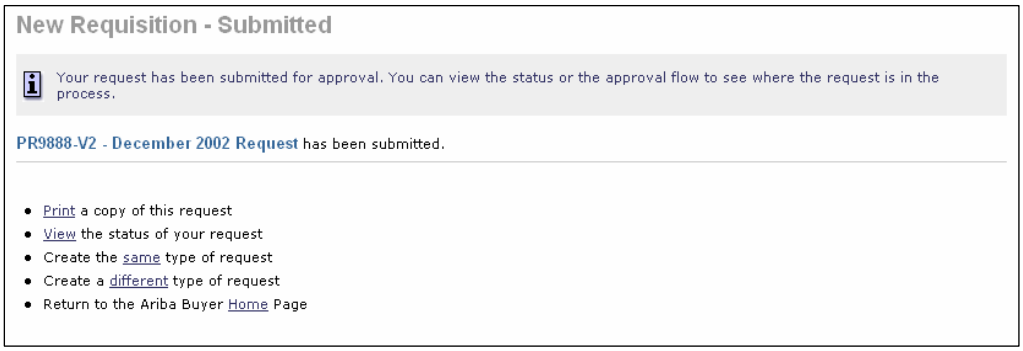


7. Confirm that all attachments and comments from the original order still apply to the changed order.

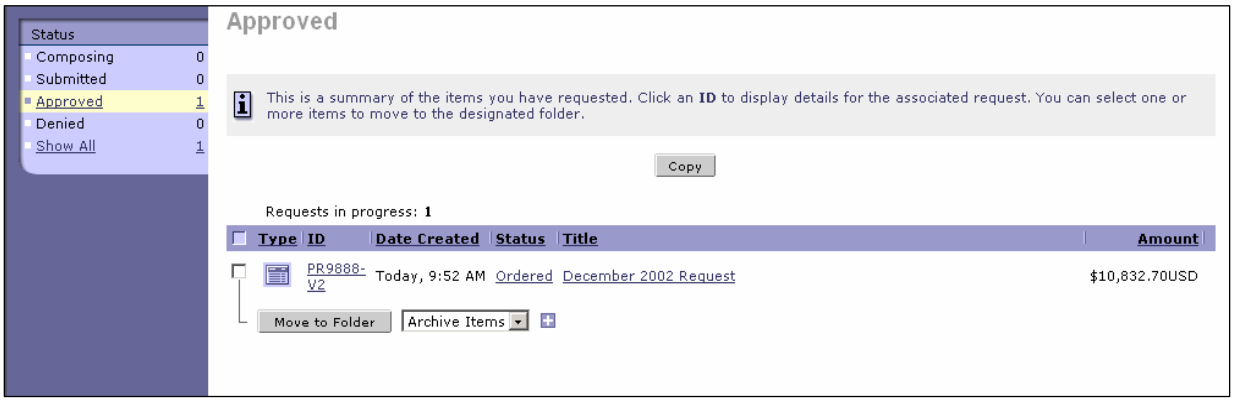
   Attachments and comments original to the requisition are listed first and in boldface. These prior comments and attachments can be deleted or modified by clicking on the **+** to the left of the comment. New comments and attachments are listed below existing ones:



8. Click on **Submit** to send the new version of requisition through the Approval Flow. You will see the same confirmation message you get when any new requisition is submitted.



9. When the new version of the requisition is fully approved, the new version of the order is created and sent to the supplier as a Change Order. The prior request is no longer visible on the Approved list; it is replaced by the newer version of the requisition.



Reopening an Order for Receiving

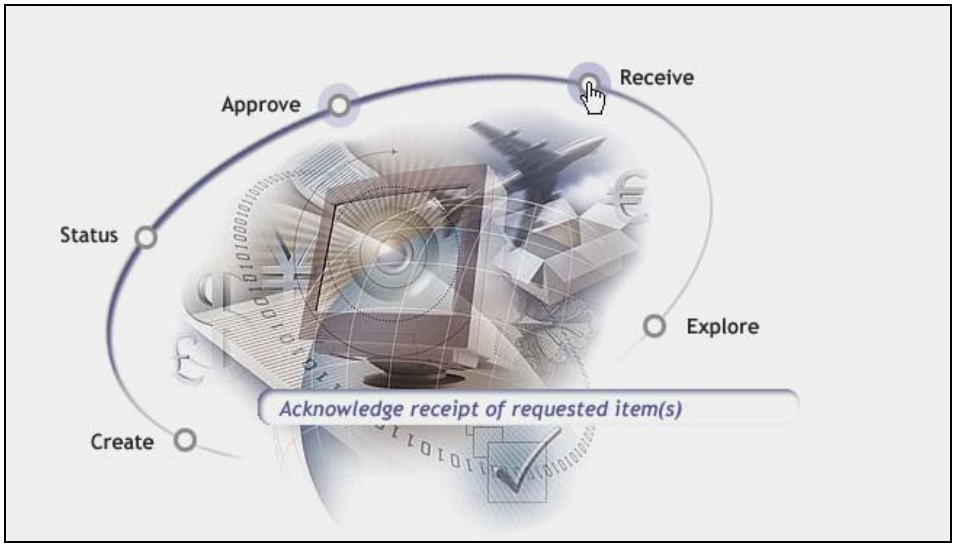
If the order to be changed is closed for receiving (i.e., in 'Received' status), it must be reopened. It could be closed because:

- All items have been successfully received
- The 'Close Order' option was selected on the last receipt

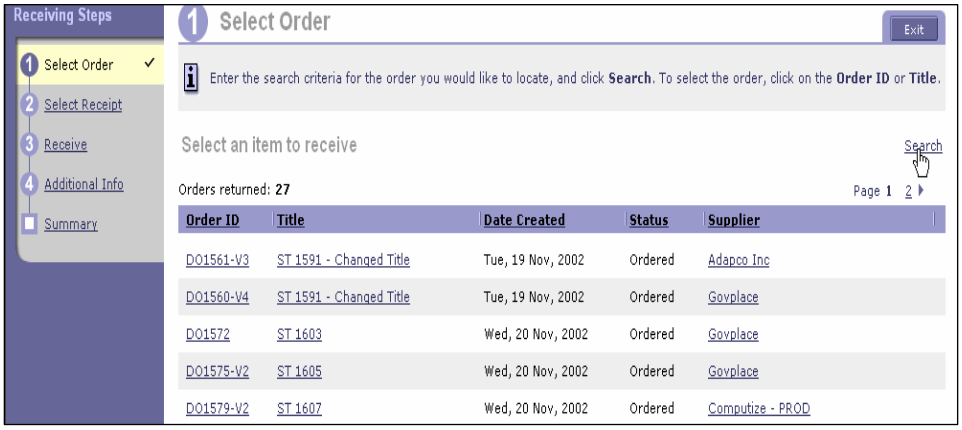
You cannot change an order that has closed. However, you can reopen the order for receiving and then make changes to the order. *You will not be able to reduce the quantity or amount ordered below the quantity or amount already received*.

To reopen an order that is closed, follow these steps:

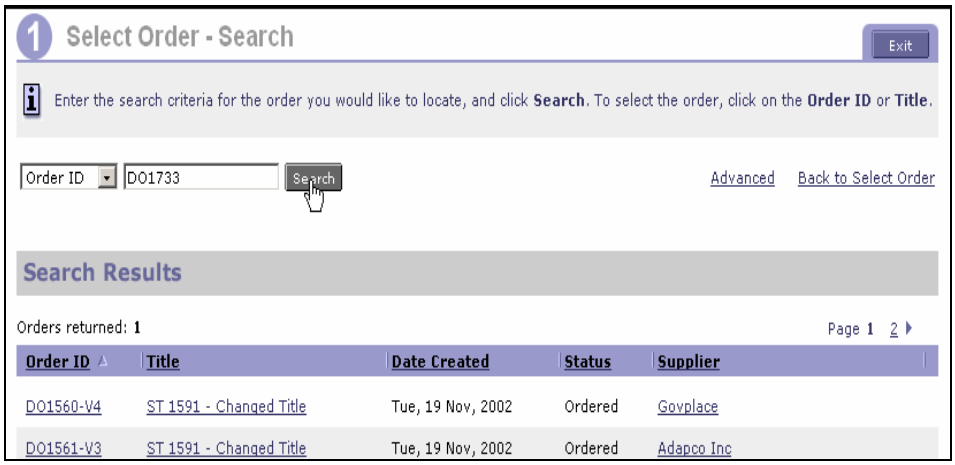
1. Click on the Receive button at the Swoosh.



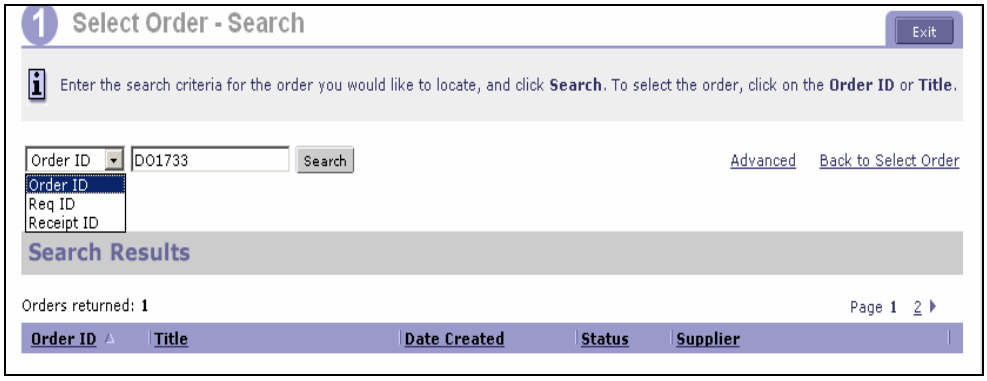
2. Select the **Search** option.



3. Enter the Order ID to be changed.

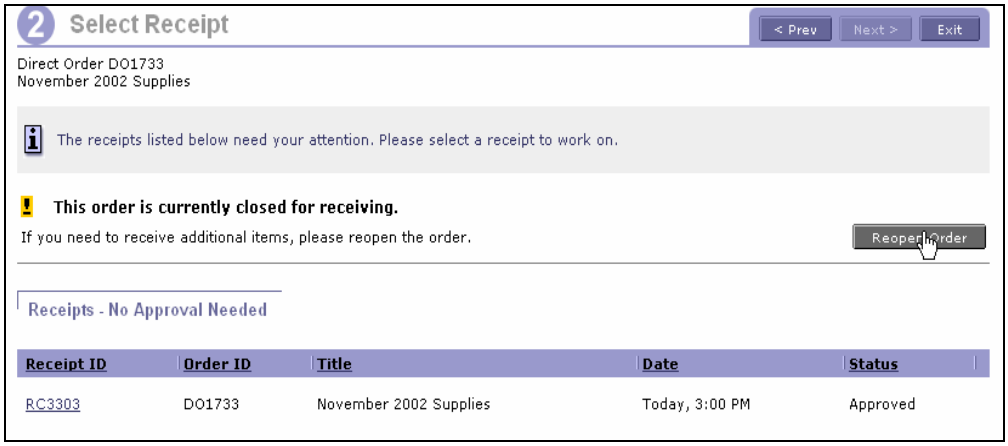


Note: You can also enter the Requisition ID or Receipt ID, using the drop-down menu for type of ID to search.

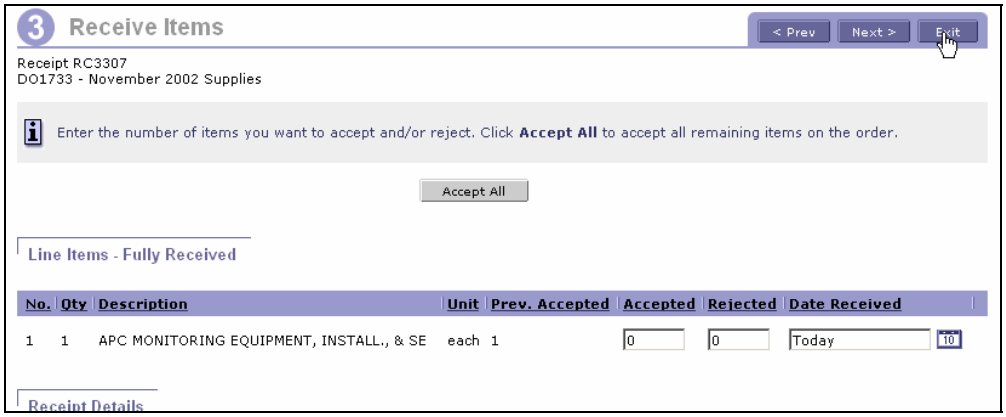


After the search for the Order ID is performed, the order is displayed with an informational message saying that the order is closed.

4. Click on the **Reopen Order** button.



5. A new receipt is opened for the order. DO NOT receive additional items at this point. Instead, **Exit** the new receipt.

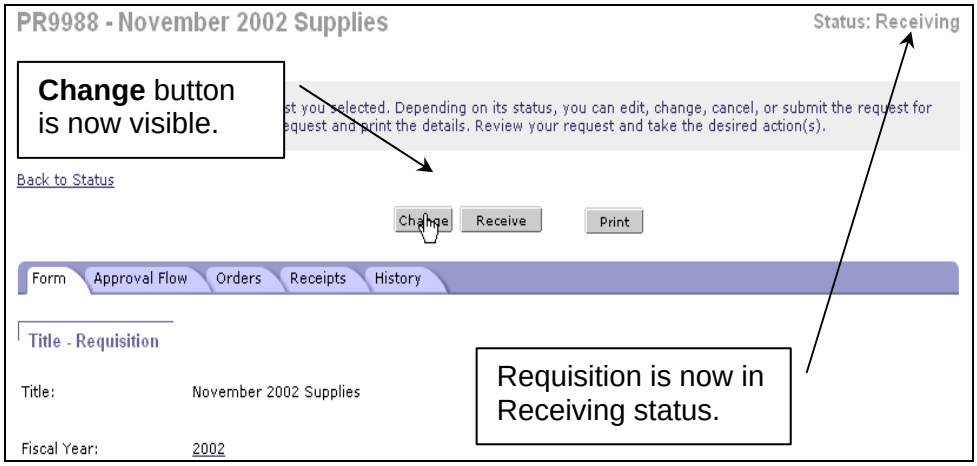


Requisitions 1

6. **Save** this new receipt, leaving the order open (i.e., in Receiving status) so that you can enter a Change Order.

Requisitions 2

7. You can now go to the requisition and click on the **Change** button.



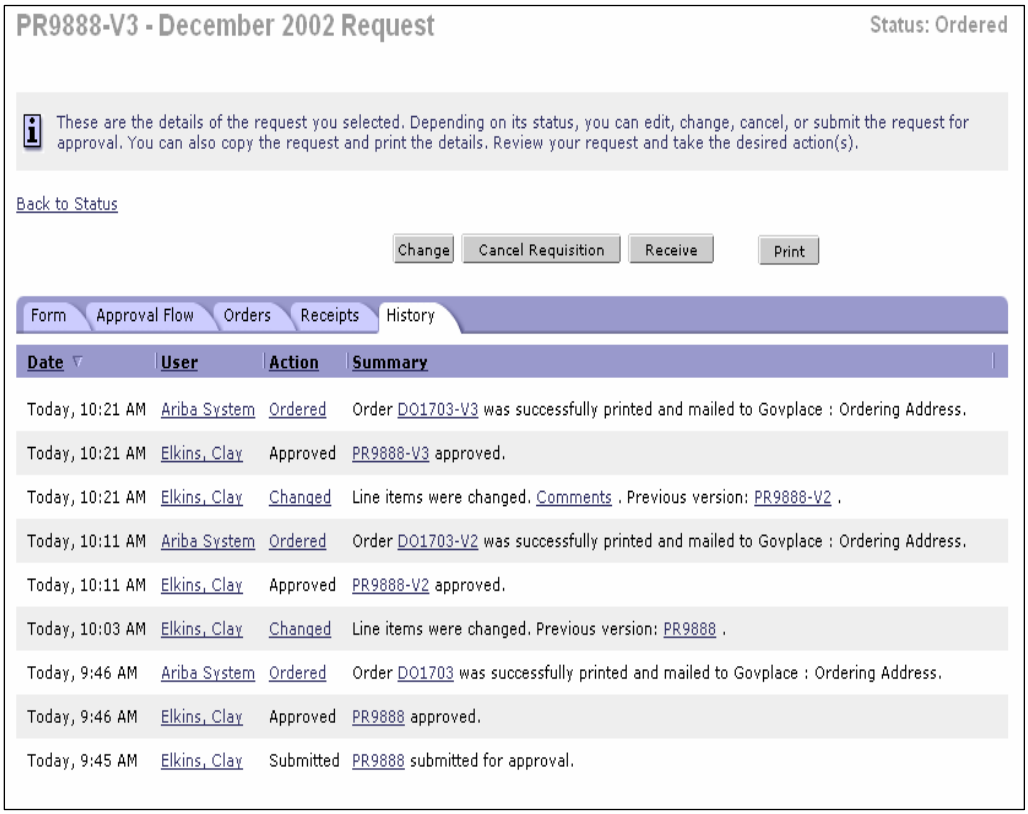
TRACKING ORDER HISTORY THROUGH CHANGE VERSIONS

A new version of a requisition is created as soon as a preparer clicks on the Change button of an existing requisition.

A new version of a purchase order is created as soon as the changed requisition is fully approved and the ordering process begins.

As new versions of requisitions and orders are created, older versions become obsolete. In eVA, they are marked behind the scenes as “inactive.”

Inactive orders will not show up on operational reports or status lists, but you can navigate to them through system searches and history tabs.



FEATURES OF CHANGE ORDER PROCESSING

Change Order is Replacement Order. The new order that is sent to the supplier contains all of the information necessary to act as a replacement order to the original (or previous) version of an order. In other words, all lines of an order are sent in the new version, whether they were changed or left untouched. For example, suppose that Lines 1, 2, and 5 lines are changed on a 6-line order. The Change Order that is sent to the supplier will show all 6 lines with their current order amounts and quantities.

You cannot un-receive. There is no way to change an order to reduce the amount or quantity of the order below the amount or quantity already received. There is also no way to un-receive an item, or reduce the amount or quantity received.

There is no need to under-receive. With change order processing in place, there is no longer any need to under-receive against an order. As an example, suppose that a shipment is short and the supplier has notified you that there is no back order available. Rather than using the **Close Order** flag on the receipt, the receiver can receive the actual amount and notify the preparer to process a change order to reduce the amount of the order to the amount actually received.

There is no need to over-receive. Similarly, there is no longer a need to over-receive against an order. As an example, suppose that a print order for 10,000 forms ships with

a modest and customary overrun, such as 560. Before receiving the 10,560, the receiver should notify the preparer to process a change order for the increased 560 forms. (Doing the change order first avoids the step to reopen the order after it is over-received.)

Modify lines to zero, but never delete them. While eVA allows you to delete lines using a change order, they will not be sent to the supplier if they are deleted. Instead, you must modify the line to a zero quantity or amount so that the changed line appears on the new (changed) order version. The preparer should also add a comment to the line pointing out that it has been changed to cancel that line of the order.

Follow up with the supplier. Change Orders are clearly marked as Change Orders, whether they are sent electronically, printed, or faxed. But as with business processing before eVA, it is wise to ensure that the supplier properly understood the Change Order, particularly if you believe the supplier may not have dealt with Change Orders from eVA before.