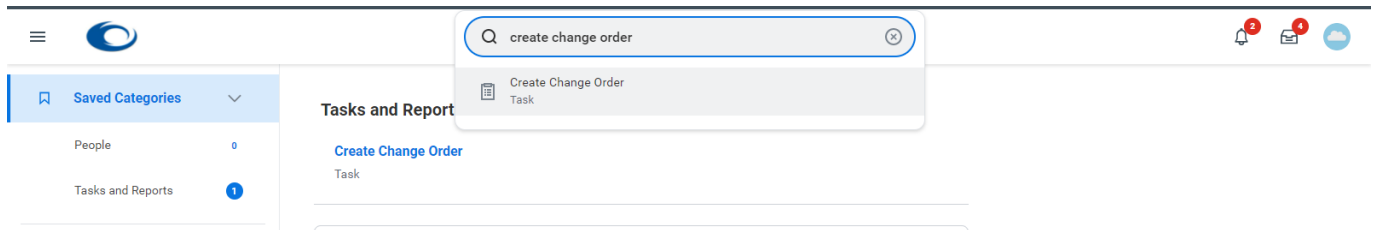


CHANGE ORDER

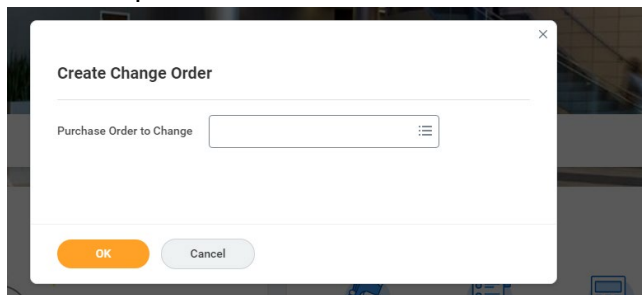
Once a Requisition has become an Issued Purchase Order, a change order can be submitted.

If you know your purchase order number:

1. From the Workday Home page, you can type *create change order* in the search bar and select the *Create Change Order Task*.



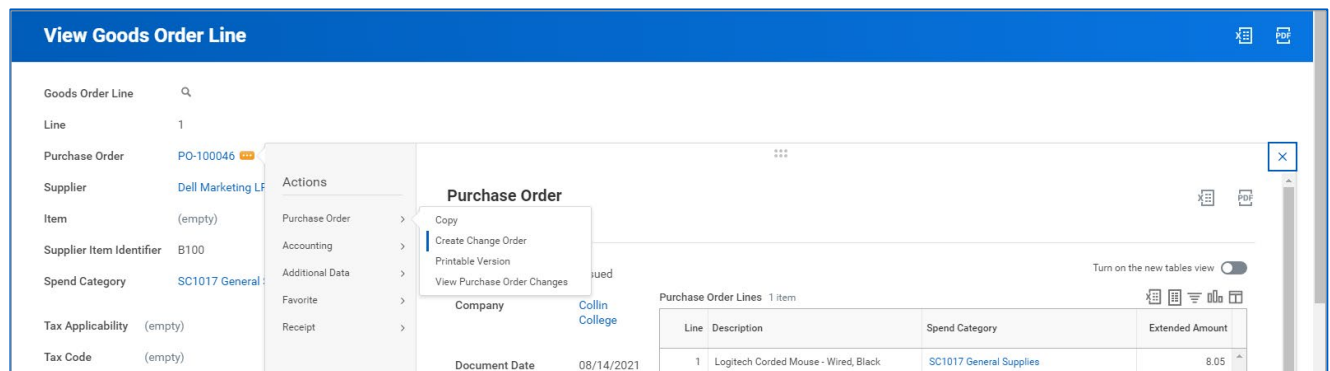
2. Enter the purchase order number in the *Purchase Order to Change* field.



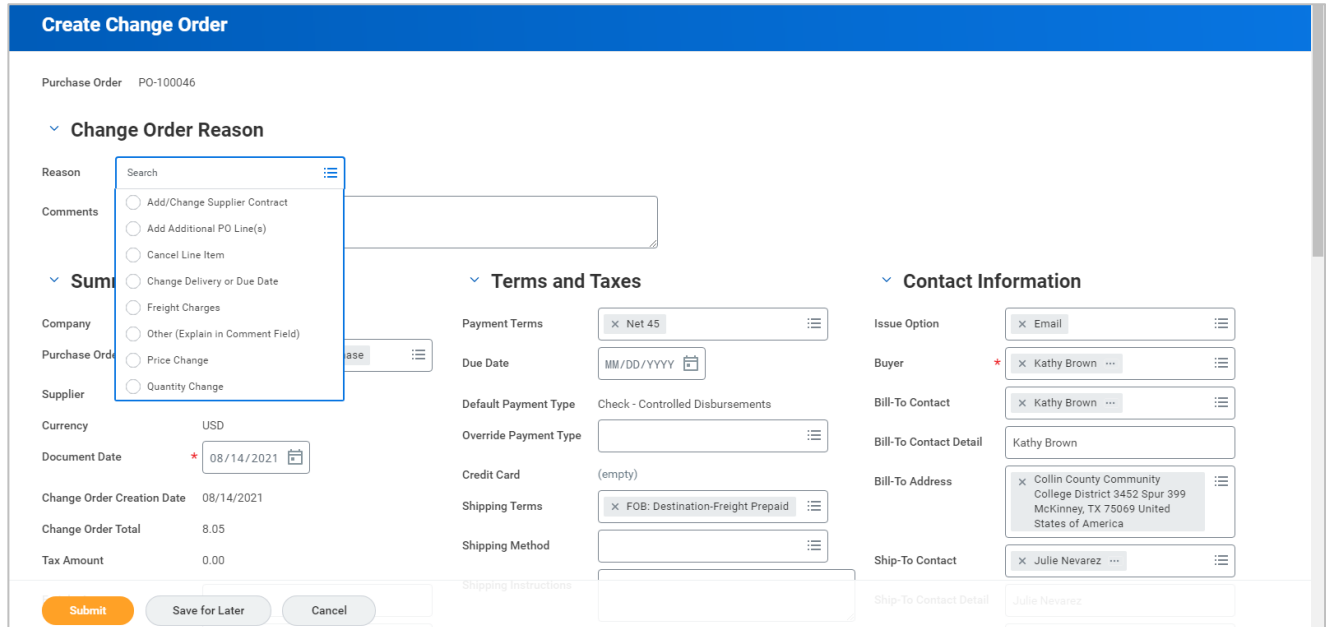
3. Click on the *OK* button.

If you do not know your purchase order number, refer to Finding Your Requisitions or Finding Your Purchase Order in the sections above.

4. Option 2: Click on the three periods (related actions) beside the purchase order number then mouse over *Purchase Order* and Click on *Create Change Order*.

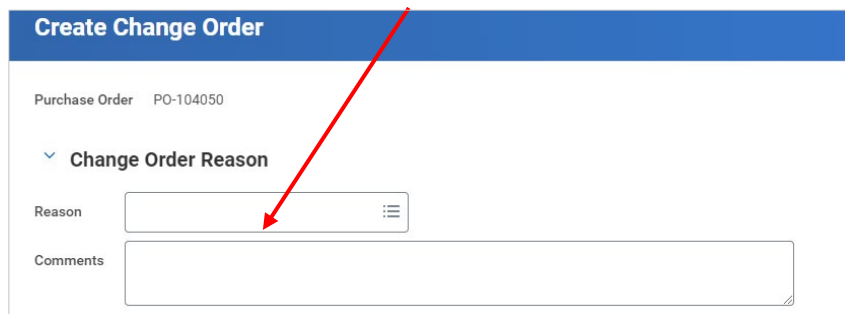


- Click on the three dashes beside the *Reason* field to get the dropdown.



Note: If a purchase order has been fully invoiced, fully received, and paid you cannot add line items. Your change will be denied.

- You must enter an explanation for the change in the *Comments* field as to exactly what is being changed. Workday has no way to indicate this when it comes to the buyer for approval.

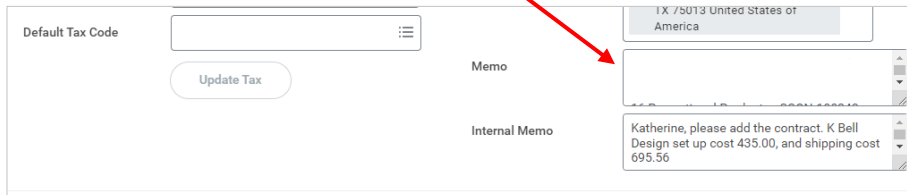


The Issue Option must be changed to Print if the purchase order is for a punchout supplier.

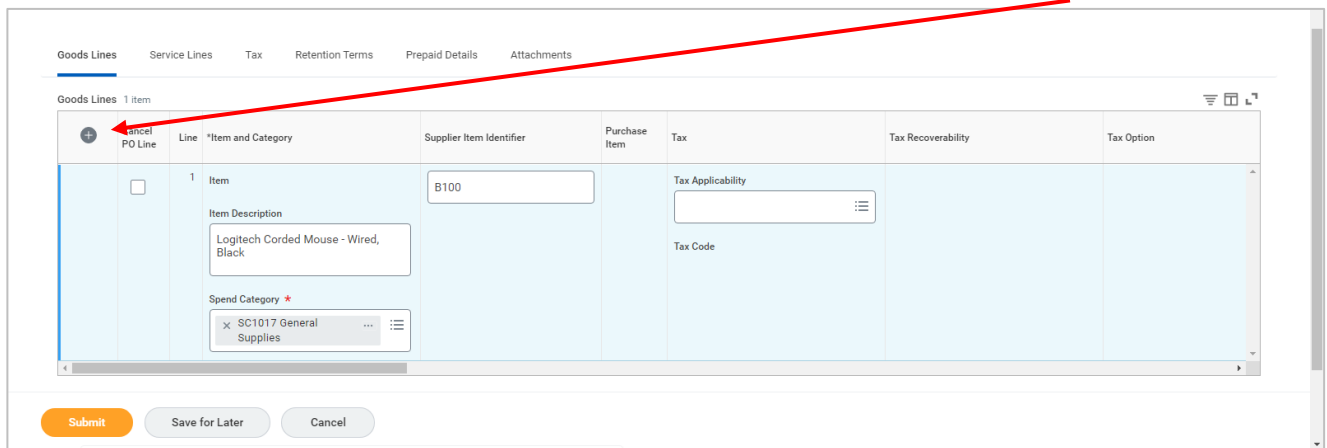
Requesters will be responsible for notifying the punchout supplier of changes when canceling items as the change order will not be sent to the supplier.



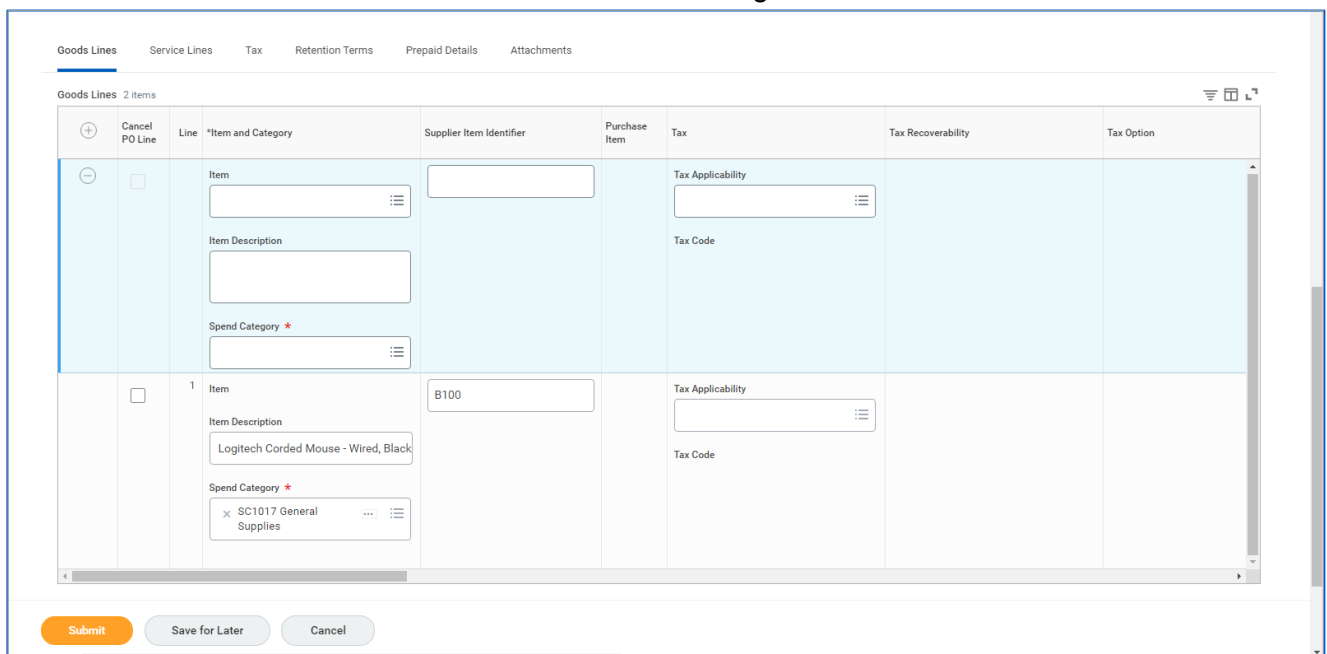
7. Add a comment in the Memo Field to let the suppliers know this is a change order and what is being changed.



8. To add a line item, scroll to the Goods or Services Lines then Click on the + at the line header.



9. The line will be added above existing line(s). Complete all required fields. If the existing line items have a contract entered, add the contract to the lines being added.




- To make changes to an existing field, any field that has a box around it is eligible for a change.
- To Cancel a Line, follow the steps above. For the Reason, choose cancel line item. In the Cancel PO Line, select the box for the line to cancel.

Goods Lines 30 items

(+)	Cancel PO Line	Line	*Item and Category	Supplier Item Identifier	Purchase Item	Tax
	<input checked="" type="checkbox"/>	1	Item Item Description 15 oz. Campfire Mug Cobalt Blue Qty 800 Price \$2.97 \$2,376.00 Spend Category SC1083 Meetings & Events	<input type="text"/>		Tax Applic Tax Code
	<input type="checkbox"/>	2	Item	<input type="text"/>		Tax Applic

- Click on the *Submit* button at the bottom left.
- You will get a message **You have submitted** with a [View Details](#) link.

View Goods Order Line


 **You have submitted**
[View Details](#)

Goods Order Line	1	Purchase Order	PO-100046	Supplier	Dell Marketing LP
Item	(empty)	Supplier Item Identifier	B100	Spend Category	SC1017 General Supplies

- If you Click on the [View Details](#) link, you will get a window that displays your change at the top left and there will be a message *Process Successfully Completed*.

You have submitted

Change Order: Dell Marketing LP on 08/14/2021 for \$23.04



Process Successfully Completed

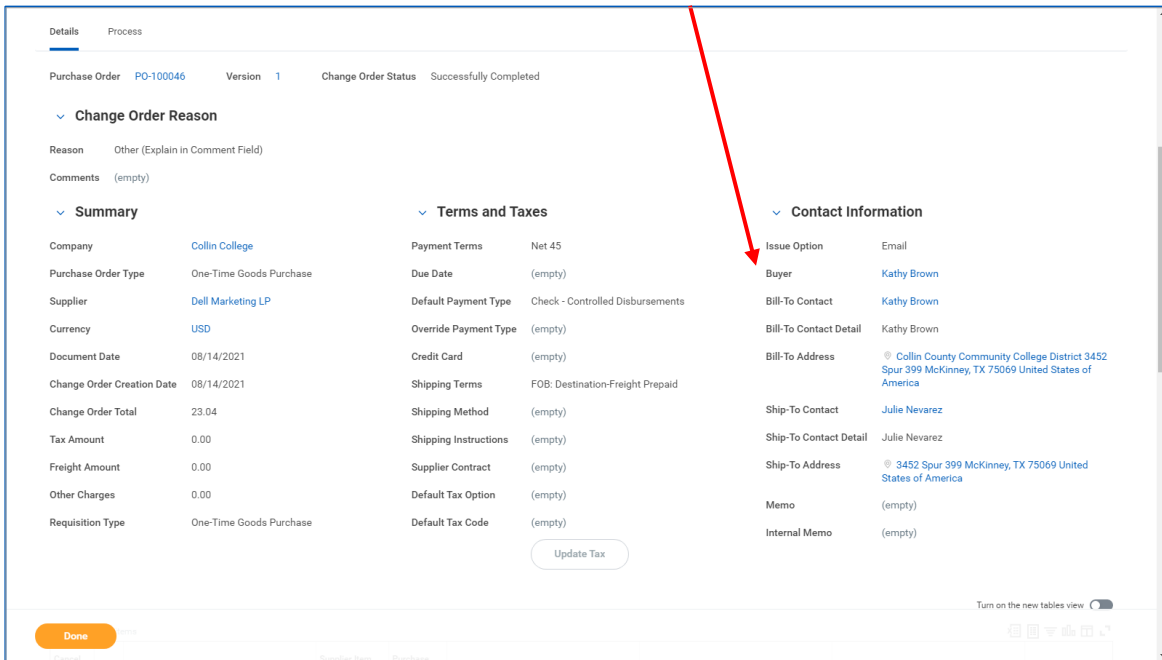
Do Another

[Create Change Order](#)

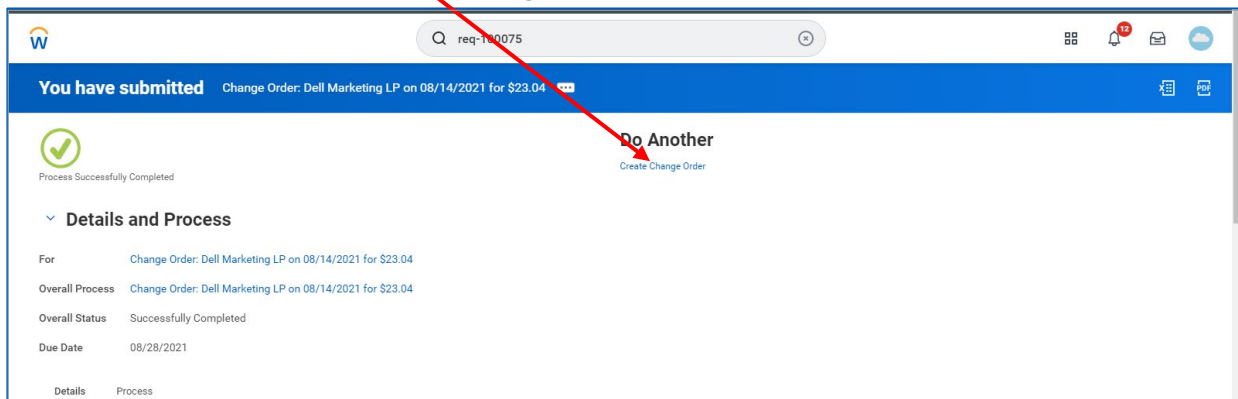
> [Details and Process](#)

[Done](#)

15. If you Click on the right pointing caret beside **Details and Process** and scroll down to the **Contact Information** on the right, you will be able to see the (Sourcing) **Buyer**. After required approvals, a change order automatically goes directly to the original (Sourcing) **Buyer**.



16. You will have the option to **Create Change Order** from here.



17. Click on the **Done** button at the bottom left.

18. Due to issues with attaching credit memos after a goods line is closed, the ability to enter a change order for Amazon and Staples is disabled. AP will send Purchasing a monthly list of Amazon and Staples purchase orders for closing. Purchasing will enter any change order that is required and close the purchase order. If a change order is processed, the requester will receive an email like the

emails below. The Issue Option will be changed to print on change orders processed for punchout suppliers and change orders will not be sent to the supplier.

