

How to Change a General PO to Be Received by Amount Instead of Quantity

The purpose of this document is to provide procurement specialists instructions on how to change a PO line from quantity to amount so that it may be received by amount instead of quantity. This change can only be made if the PO line in need of change has no voucher or receipt activity associated to it.

Important: this process if perfectly followed will not route for approval. *It is a known fact that if you enter comments along with perform any other changes or data entry when performing these steps, the PO will route for approval.* If you must enter comments, enter them first and save them, then completely get out of the PO by clicking <Return to Search>. Access the PO again and then follow these steps:

1. Navigate to: Purchasing>Purchase Orders>Add/Update PO.
2. Click the change order icon at the header level.

Maintain Purchase Order

Purchase Order

Business Unit UMN01
PO ID 0001067744

PO Status Dispatched
Budget Status Valid

Copy From

Hold From Further Processing

Header

*PO Date 08/03/2015
*Supplier MATHESONTR-001
*Supplier ID 000008284
Requester ID HUANWANG
*Buyer ARUUD

Supplier Search
Supplier Details
MATHESON TRI GAS
Huan Wang
April Corrine Wolters

Backorder Status Not Backordered
Receipt Status Not Recvd

*Dispatch Method Email

Create BackOrder
Dispatch Merkur Delivery Information

PO Reference

Start Date End Date

Header Details Edit Comments Activity Summary
PO Defaults Add ShipTo Comments
PO Activities Requisitions
Actions Document Status

Amount Summary

Merchandise	1,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	1,000.00	USD
Encumbrance Balance	1,000.00	USD

Calculate

Add Items From

Catalog Purchasing Kit
Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		liquid nitrogen	1.0000	LOT	L0190000	1,000.00000	1,000.00	Approved

- Verify the intended dispatch method is chosen. In most cases, since you are simply changing from quantity to amount, the supplier will not need to receive the PO change order. Select PHONE as the dispatch if you don't want the supplier to be issued the change order.

Maintain Purchase Order

Purchase Order

Business Unit UMN01 PO ID 0001067744

PO Status Dispatched Budget Status Valid

Copy From

Hold From Further Processing

Header

*PO Date 08/03/2015 Supplier Search Backorder Status Not Backordered
 *Supplier MATHESONTR-001 Supplier Details Receipt Status Not Recvd
 *Supplier ID 0000008284 MATHESON TRI GAS
 Requester ID HUANWANG Huan Wang
 *Buyer ARUUD April Corrine Wolters

*Dispatch Method Phone

Amount Summary

Merchandise	1,000.00
Freight/Tax/Misc.	0.00
Total Amount	1,000.00 USD
Encumbrance Balance	1,000.00 USD

Start Date End Date

Header Details Edit Comments Activity Summary
 PO Defaults Add ShipTo Comments
 PO Activities Requisitions
 Actions Document Status

Add Items From

Select Lines To Display Search for Lines Line To Retrieve

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		liquid nitrogen	1.0000	LOT	L0190000	1,000.00000	1,000.00	Approved

- Click the Statuses tab. Then, click the change order icon at the line level.

Maintain Purchase Order

Purchase Order

Business Unit UMN01 PO ID 0001067744

PO Status Dispatched Budget Status Valid

Copy From

Hold From Further Processing

Header

*PO Date 08/03/2015 Supplier Search Backorder Status Not Backordered
 *Supplier MATHESONTR-001 Supplier Details Receipt Status Not Recvd
 *Supplier ID 0000008284 MATHESON TRI GAS
 Requester ID HUANWANG Huan Wang
 *Buyer ARUUD April Corrine Wolters

*Dispatch Method Phone

Amount Summary

Merchandise	1,000.00
Freight/Tax/Misc.	0.00
Total Amount	1,000.00 USD
Encumbrance Balance	1,000.00 USD

Start Date End Date

Header Details Edit Comments Activity Summary
 PO Defaults Add ShipTo Comments
 PO Activities Requisitions
 Actions Document Status

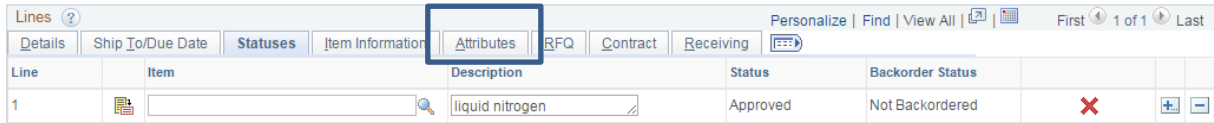
Add Items From

Select Lines To Display Search for Lines Line To Retrieve

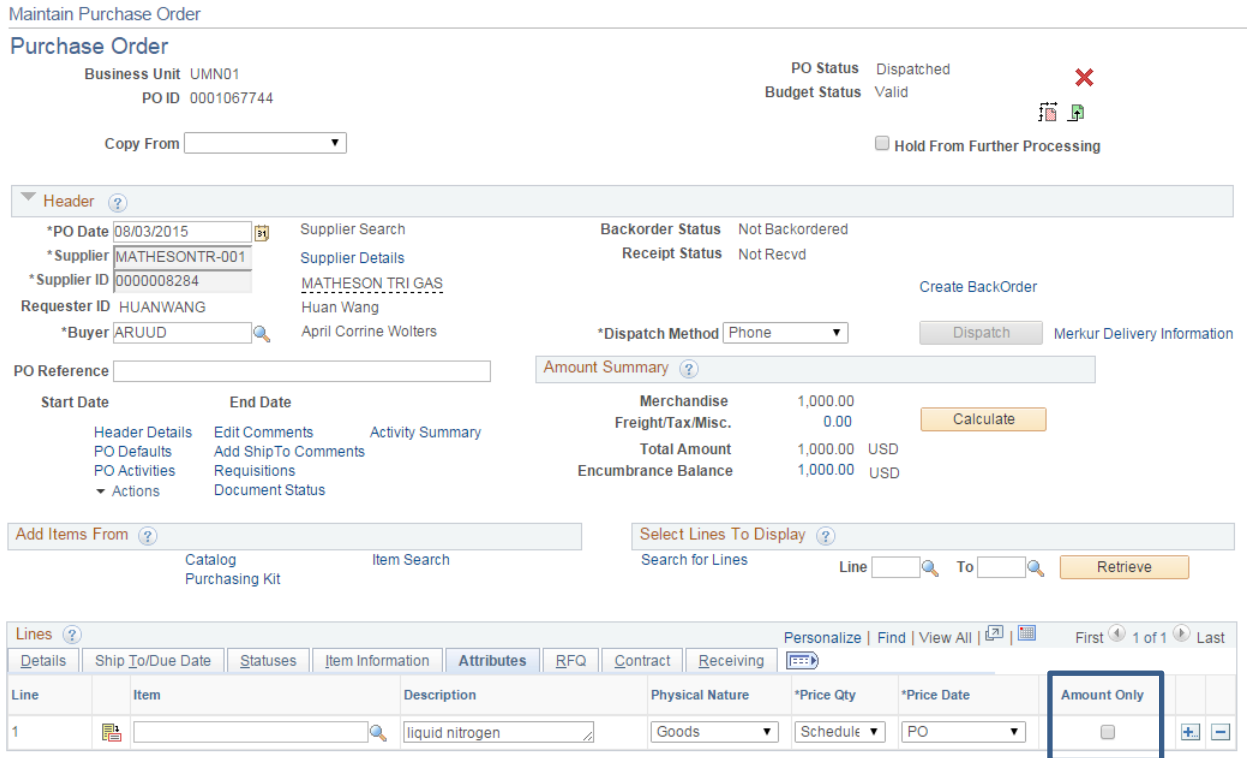
Lines

Line	Item	Description	Status	Backorder Status
1		liquid nitrogen	Approved	Not Backordered

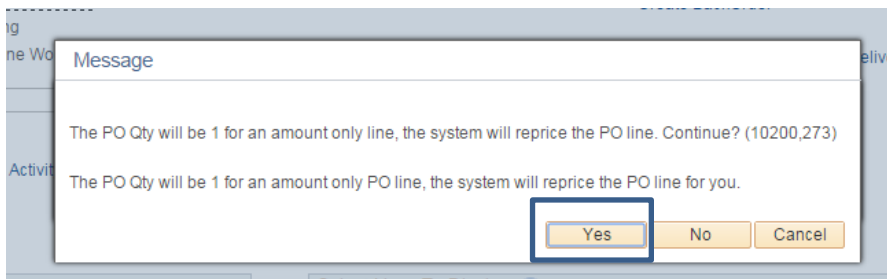
5. Click the Attributes tab.



6. Place a check in the Amount only checkbox.



7. A popup message will appear. Click <Yes>.



8. The PO's header status will change to Dispatched, not checked. Click save.

Maintain Purchase Order

Purchase Order

Business Unit UMN01
PO ID 0001067744

PO Status Dispatched
Budget Status Not Chk'd

Copy From []

Hold From Further Processing

Header

*PO Date 08/03/2015 Supplier Search Backorder Status Not Backordered
 *Supplier MATHESONTR-001 Supplier Details Receipt Status Not Recvd
 *Supplier ID 000008284 MATHESON TRI GAS Create BackOrder
 Requester ID HUANWANG Huan Wang
 *Buyer ARUUD April Corrine Wolters *Dispatch Method Phone Dispatch Merkur Delivery Information

PO Reference []

Amount Summary

Merchandise	1,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	1,000.00	USD
Encumbrance Balance	1,000.00	USD

Calculate

Start Date [] End Date []

Header Details Edit Comments Activity Summary
 PO Defaults Add ShipTo Comments
 PO Activities Requisitions
 Actions Document Status

Add Items From [] Catalog Purchasing Kit Item Search

Select Lines To Display [] Search for Lines Line [] To [] Retrieve

Lines

Personalize Find View All First 1 of 1 Last

Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1	[]	liquid nitrogen	Goods	Schedule	PO	[]

View Printable Version
View Approvals

Close Short All Lines *Go to [] More ...

Save Return to Search Notify Refresh Add

9. The PO's header status will change to Approved, not checked. You have two options: either let the next scheduled procurement job budget check and dispatch the PO, or you may manually initiate these processes. Until the PO is back in dispatched status, it cannot be received or vouchered.

Maintain Purchase Order

Purchase Order

Business Unit UMN01
PO ID 0001067744

Change Order 1
Copy From []

PO Status Approved
Budget Status Not Chk'd

Hold From Further Processing

Header

*PO Date 08/03/2015 Supplier Search
 *Supplier MATHESONTR-001 Supplier Details Receipt Status Not Recvd
 *Supplier ID 000008284 MATHESON TRI GAS
 Requester ID HUANWANG Huan Wang
 *Buyer ARUUD April Corrine Wolters *Dispatch Method Phone Dispatch Merkur Delivery Information

PO Reference []

Amount Summary

Merchandise	1,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	1,000.00	USD
Encumbrance Balance	1,000.00	USD

Calculate

Start Date [] End Date []

Header Details Edit Comments Activity Summary
 PO Defaults Add ShipTo Comments
 PO Activities Requisitions
 Actions Document Status

Add Items From [] Catalog Purchasing Kit Item Search

Select Lines To Display [] Search for Lines Line [] To [] Retrieve

Lines

Personalize Find View All First 1 of 1 Last

Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1	[]	liquid nitrogen	Goods	Schedule	PO	[]

View Printable Version




10. To manually, budget check, click the budget check icon at the header level.

Maintain Purchase Order

Purchase Order

Business Unit UMN01
PO ID 0001067744
Change Order 1
Copy From []

PO Status Approved
Budget Status Not Chk'd

Hold From Further Processing

▼ Header ?

*PO Date 08/03/2015 Supplier Search
*Supplier MATHESONTR-001 Supplier Details Receipt Status Not Recvd
*Supplier ID 000008284 MATHESON TRI GAS
Requester ID HUANWANG Huan Wang
*Buyer ARUUD April Corrine Wolters *Dispatch Method Phone Dispatch Merkur Delivery Information

PO Reference [] Amount Summary ?




11. Once the budget check is finished and the PO's budget status is valid, click <Dispatch>.

Maintain Purchase Order

Purchase Order

Business Unit UMN01
PO ID 0001067744
Change Order 1
Copy From []

PO Status Approved
Budget Status Valid

Hold From Further Processing

▼ Header ?

*PO Date 08/03/2015 Supplier Search Backorder Status Not Backordered
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*Supplier ID 000008284 MATHESON TRI GAS Create BackOrder
Requester ID HUANWANG Huan Wang
*Buyer ARUUD April Corrine Wolters *Dispatch Method Phone Dispatch Merkur Delivery Information

PO Reference [] Amount Summary ?

12. A subpage will appear. Click <OK>.

Dispatch Options

Use One Ship To Ship To P117640023

Dispatch Options

Fax Cover Page []
Server Name []
*Output Destination Type WEB
Output Destination Format PDF
Template ID []

Test Dispatch
 Print BU Comments
 Print Duplicate on PO
 Print Changes Only
 Print PO Item Description
 Print Copy

OK Cancel Refresh

Refresh page (Alt+0)

13. If you wish to wait to see whether the PO successfully dispatched, click <Yes>. Please note that this will take a couple of minutes and you cannot do anything else in EFS. Otherwise, click <No> and you will be taken to the PO Add/Update page where you can continue to do work in EFS.

Message

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.