

Purchase Order Change Request (POCR)

The POCR functionality allows a range of modifications to be made to an existing Purchase Order (PO). Changes to a PO may be necessary based on supplier communication or updates to internal organizational needs.

POCR SETTINGS:

POCR permissions are defined through the enablement of global settings. Administrators identify which changes or combinations of changes can be made to a PO. POCR permissions can be defined by:

- Product Type: Materials, Services, Blanket, Invoice
- Header level & Line Item Level permissions
- Requisition Type: Catalog & Non-Catalog permissions

POCR's can be performed when a PO is in any of following Statuses:

1. Ordered
2. Partially Confirmed (Available in Supplier)
3. Shipped
4. Confirmed
5. Received
6. Invoiced


POCR will NOT be allowed for the following PO Statuses:

1. SUBMITTED
2. PAID

NOTE: An Administrator can complete a POCR on behalf of a Requester as long as the PO is in a state that allows a Change Request.

CREATE A PO CHANGE REQUEST:

Retrieve the Purchase Order requiring a change. PO's in 'Invoiced' Or Received' status cannot have POOCRs performed against them.

1. Click on the PO # link.
2. Click on the blue FAB button located in the bottom right corner of  the PO display screen.
3. Click 'Change Order' (shown on right)

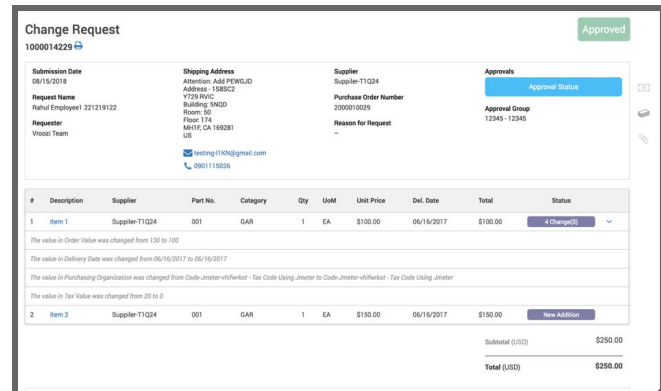


4. The PO is now ready to be edited based on editing permissions defined for your organization.

5. Add any additional information.

6. Click 'Submit'.

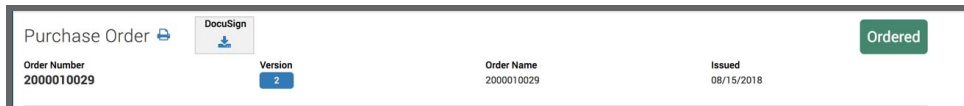
7. The **Change Request** will generate a new Request document. The new request can be viewed from the 'Related Documents'.



➤ The change request document generated via the POCR process will go through any defined sourcing or financial approval workflows. The change summary will display all changes made to the PO, including field-level changes displaying the before and after values or assignments. (shown below)

8. Once the Change Request is approved by the approver(s), the original PO is updated with the new changes. While the document will retain the same PO number a new version number will appear in the PO header. (shown below)

➤ Notification that the POCR has been approved will be sent via email.



Your suppliers will receive an email notification confirming what changes have been made. At that time, cXML enable or Supplier Portal suppliers can again confirm or dispute the PO at the header or line item level.

The Purchase Order history trail from creation to current status (shown on right) can be accessed in the PO's action panel. From the history trail, users can drill down to view the line-item level changes made to the document, including field-level changes for edited items.

