

# 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 POCRs performed agains 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'.

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Req Rah	mission Date 15/2018 uest Name ul Employee1 2212 uester szi Team	19122	Shipping Addre Attention: Add Address - 1585 Y129 RVic Building: SNQD Room: 50 Floor: 174 MH15; CA 1692 US	PEWGJD IC2 181 Nggmail.com		Sup Pun 200	plier piler-T1Q24 chase Order Numb 0010029 son for Request	er	Approvals Approval Group 12345 - 12345	Approval Status	
	Description	Supplier	Part No.	Category	Qty	UoM	Unit Price	Del. Date	Total	Status	
	Item 1	Suppiler-T1Q24	001	GAR	1	EA	\$100.00	06/16/2017	\$100.00	4 Change(S)	l ~ 1
the s	alue in Order Value	was changed from 130 to 1	100								
the s	alue in Delivery Dat	e was changed from 05/76	/2017 to 06/16/2011								
The s	alue in Purchasing I	Organization was changed	from Code-Jmeter-vi	hifwrkot - Tax Code L	Ising Jmeter	to Code-Jn	reter-vhifwskot - Tax	Code Using Jmeter			
the s	alue in Tax Value w	as changed from 20 to 0									
	item 2	Suppiler-T1Q24	001	GAR	1	EA	\$150.00	06/16/2017	\$150.00	New Addition	1
									Subtotal (USD)		\$250.00
									Total (USD)		\$250.00

➤ 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.

Purchase Order 🖶	DocuSign			Ordered
Order Number 2000010029	Version 2	Order Name 2000010029	Issued 08/15/2018	

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.

	POCR DETAILS	
	Today at 10:32 AM   5 change(a) made to the PO#2000001153	
0	HP 951 Cyan/Magenta/Yellow Origin al Ink Cartridges (CR314FN), Pack Of 3 Cartridges Quantity: 3 Price: \$66.40	^
	The value in <b>Quantity</b> was changed from <b>5</b> to <b>3</b>	
	Account Category: Cost Center	
	Cost Center: 20 - Operations	
[0]	GL Account: 1001 - Stock	