



CENTRALSQUARE
TECHNOLOGIES

PO Change Orders

(POUPCO)

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Overview

The POUPCO screen is used to enter change orders against purchase orders (PO). Change orders allow changes to be made to a PO, the changes routed for additional approvals, encumbrances adjusted, and the changes logged in the original PO so that all the changes made to the PO can be tracked.

Basic PO Change Order Process

A typical PO Change Order process includes: a change order is created, approved, and purchase order is updated with the Purchasing Manager final approval.

User creates PO Change Order.
Purchase order is not updated at this point.

APPROVAL PROCESS:
User approves change order to initiate workflow.

Purchasing Manager approves change order and the purchase order is updated.
If the Purchasing Manager rejects the change order the purchase order is not updated.

Accessing the POUPCO screen

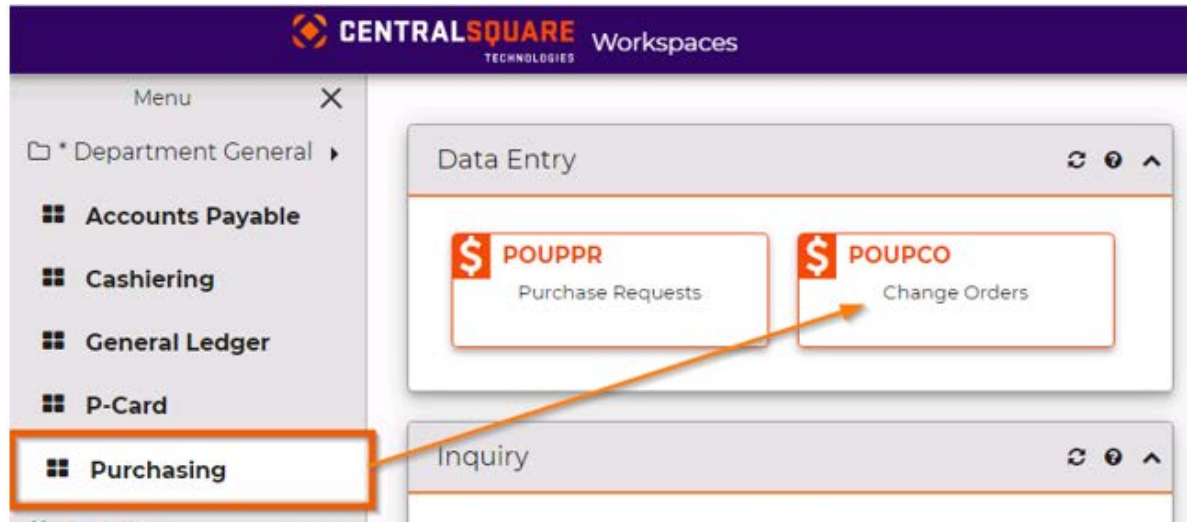
Using the Search Bar

The POUPCO screen can be accessed from the Workspaces screen by entering POUPCO into the search field in the top right corner of the screen and selecting the Change Orders (POUPCO) link that appears.

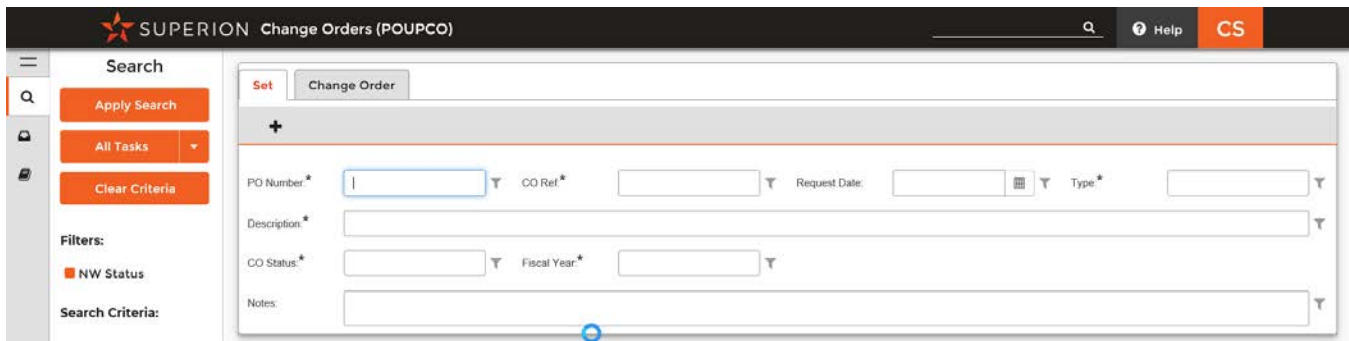


Using a Link

Alternatively, the screen can be opened using a link in the Workspaces. In the Department General workspace, on the Purchasing Task Center, select the POUPCO Change Orders link from the Data Entry component.

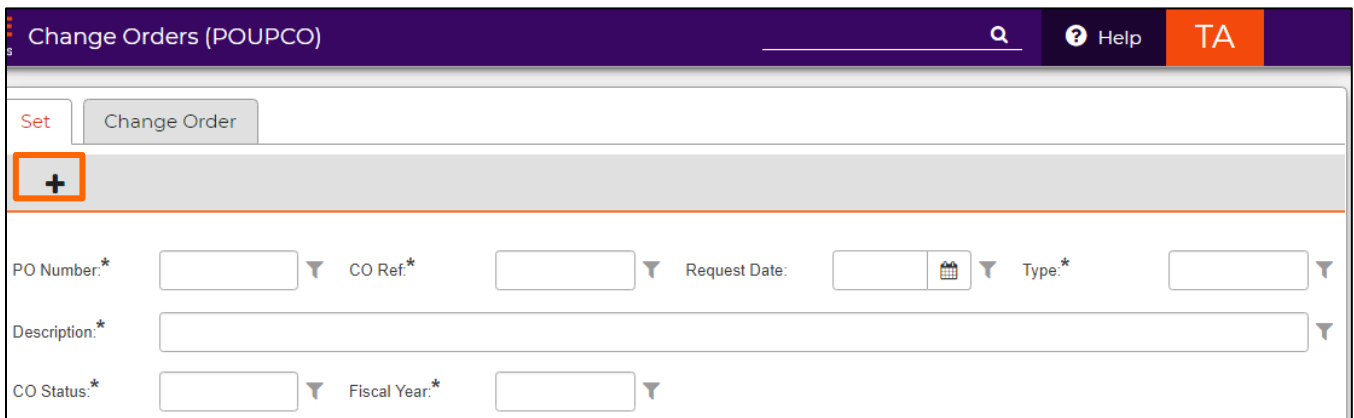


The POUPCO screen will open in a new tab in your browser as shown in the following image.



Creating A PO Change Order Set

To create a new Journal Entry Set, you must first switch the screen from Search Mode to Add Mode. This is done by clicking on the + plus icon at the top of the screen to the right of the task pane.



Change Orders (POUPCO) [Search] [Help] TA

Set Change Order

+ (highlighted)

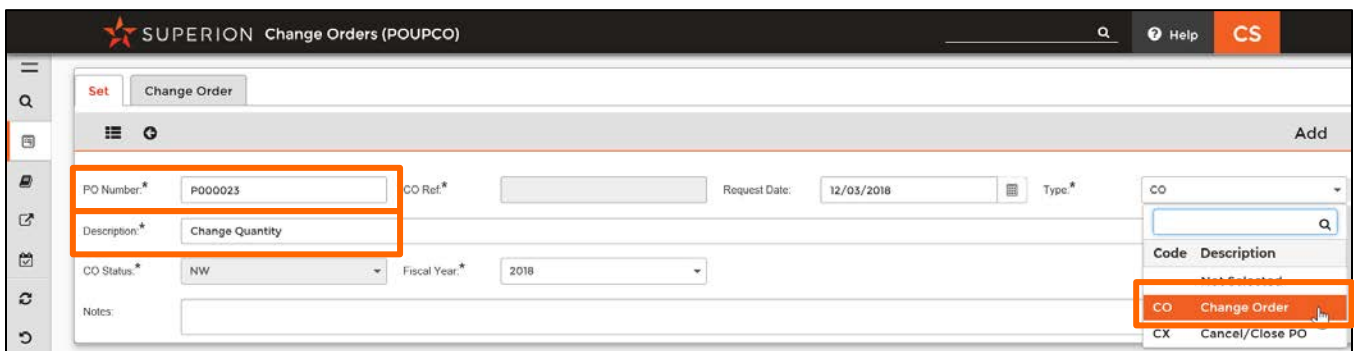
PO Number:* [] CO Ref:* [] Request Date: [] [Calendar] Type:* []

Description:* []

CO Status:* [] Fiscal Year:* []

Set Details

Enter the PO Number to be changed in the PO number field and enter a description of the change in the Description field. Select CO - Change Order from the Type field drop down.



SUPERION Change Orders (POUPCO) [Search] [Help] CS

Set Change Order Add

PO Number:* P000023 CO Ref:* [] Request Date: 12/03/2018 [Calendar] Type:* []

Description:* Change Quantity

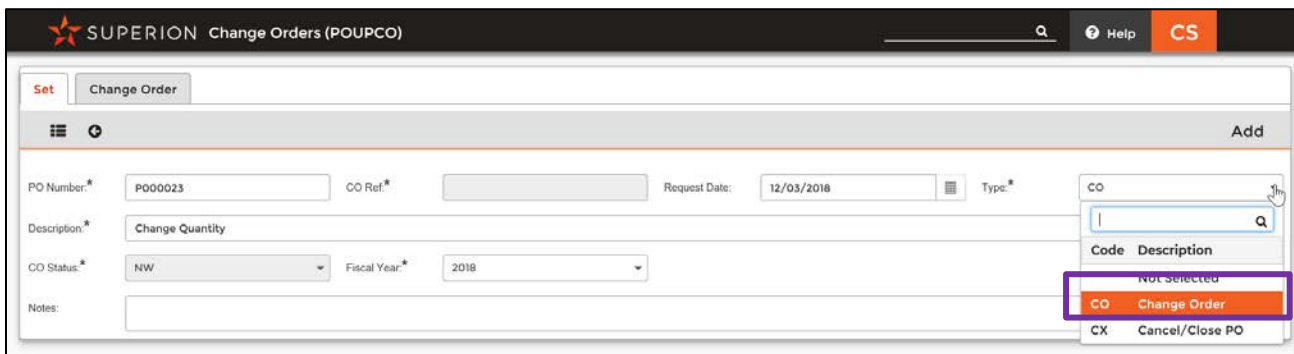
CO Status:* NW Fiscal Year:* 2018

Notes: []

Type dropdown menu:

Code	Description
CO	Change Order
CX	Cancel/Close PO

If closing the PO, select the CX – Cancel/Close PO from the Type field drop down.



SUPERION Change Orders (POUPCO) [Search] [Help] CS

Set Change Order Add

PO Number:* P000023 CO Ref:* [] Request Date: 12/03/2018 [Calendar] Type:* []

Description:* Change Quantity

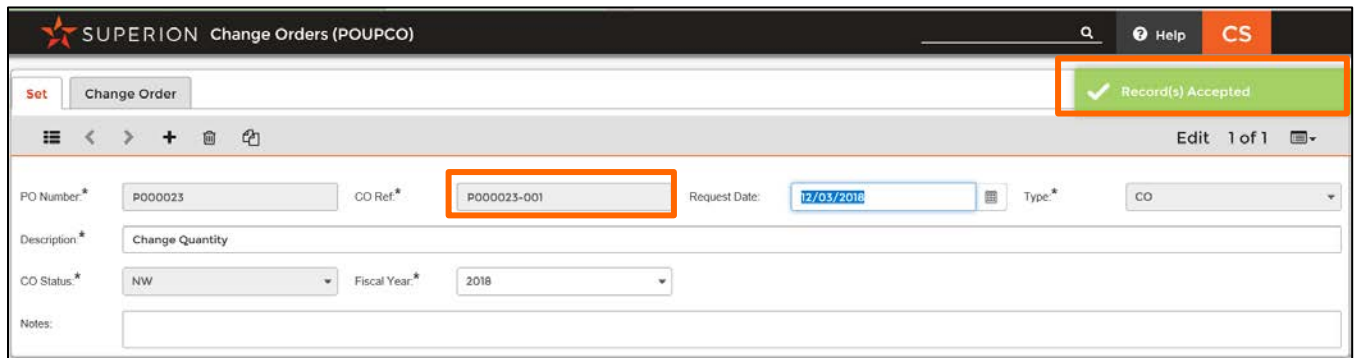
CO Status:* NW Fiscal Year:* 2018

Notes: []

Type dropdown menu:

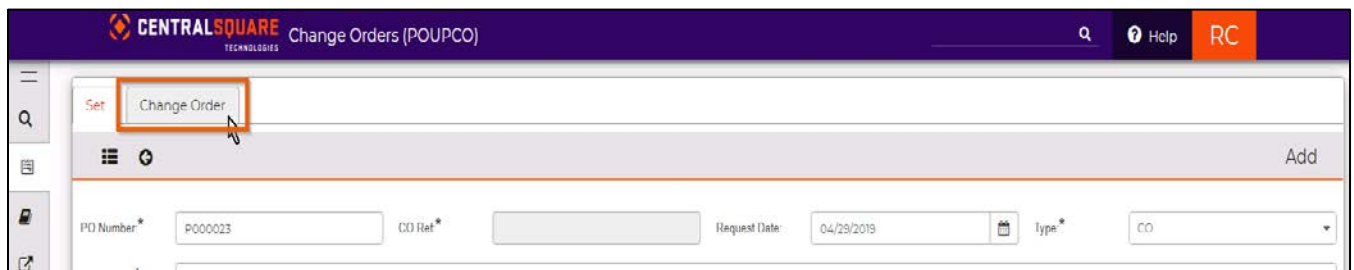
Code	Description
CO	Change Order
CX	Cancel/Close PO

Click the Save button to create the change order set. A Record Accepted message will be displayed in the top right corner and the CO Ref field will be populated.

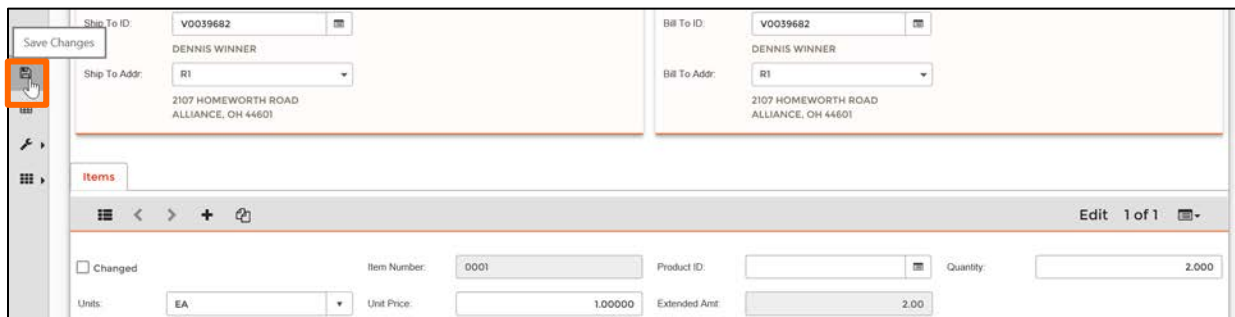


Change Order Details

Once the set has been created, click on the Change Order tab and the current contents of the PO record will be displayed.



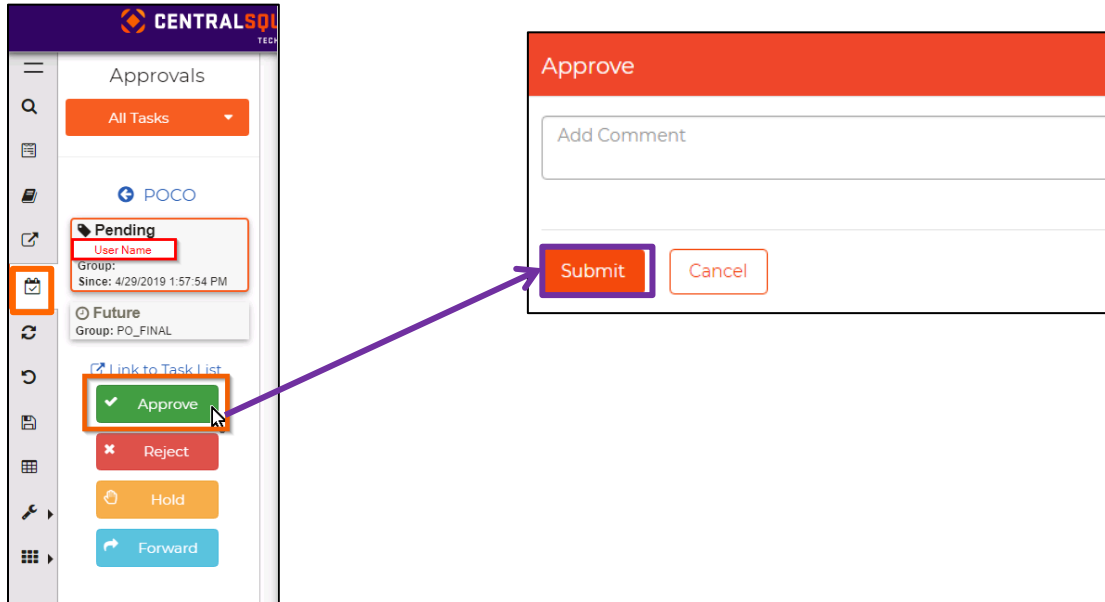
Make the necessary changes to the purchase order data. Once all the changes have been made save the record by pressing Enter or clicking the floppy disc icon on the left Menu bar.



PO Change Order Approval

Once the initiator of the change order is finished, that user must approve it to kick off the Workflow process.

Select Pending Tasks on the left from the Menu and click Approve. Add any comments but keep in mind that comments are not required and cannot be deleted or edited once they are submitted. Click Submit to initiate the workflow.



The Approvals will update to show the next approval group in the workflow. The purchase order will be updated once the Purchasing Manager has approved the change order.