Changing a Purchase Order

The process to submit a change order to Contracts and Procurement involves submitting a requisition using the CFS requisition submission process and using the following steps to identify the requisition as a change order and not a request for a new purchase order.

⚠️ These instructions assume that you already know how to create a purchase requisition.

💡 You may want to have a copy of the original purchase requisition to refer to while filling out the change order.
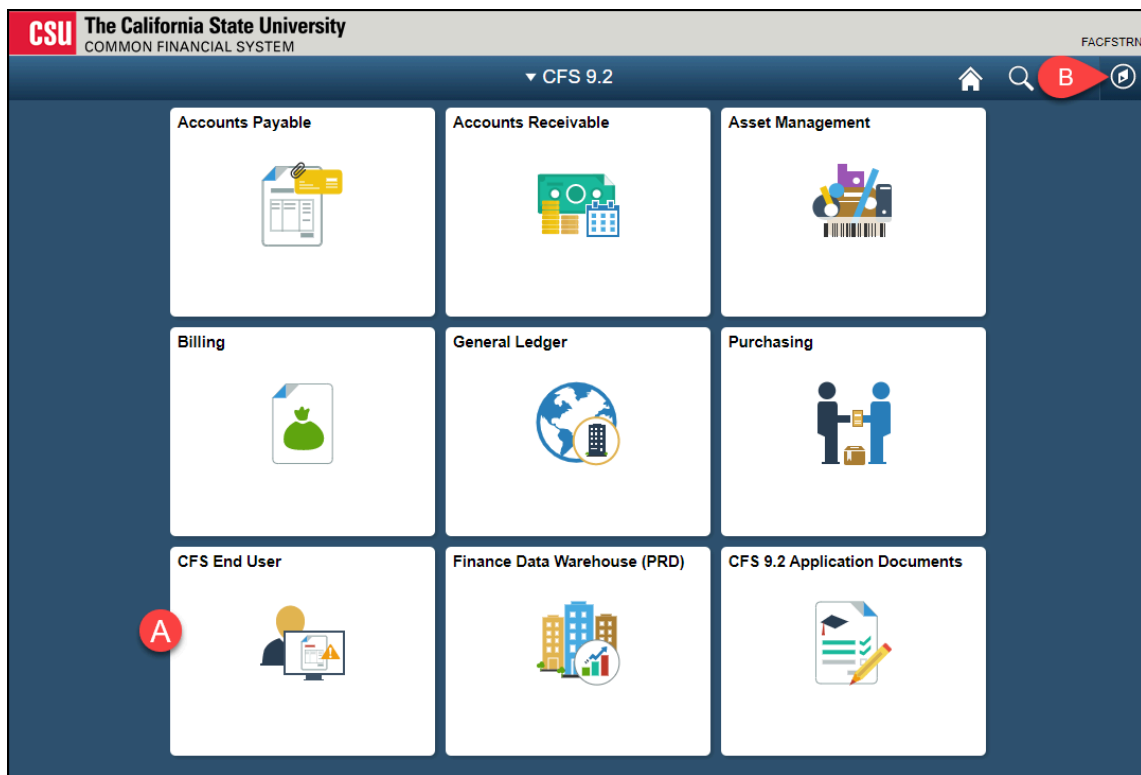
1. Log in to CFS from Titan Online on the campus portal.

View How Do I Access CFS? for more information.

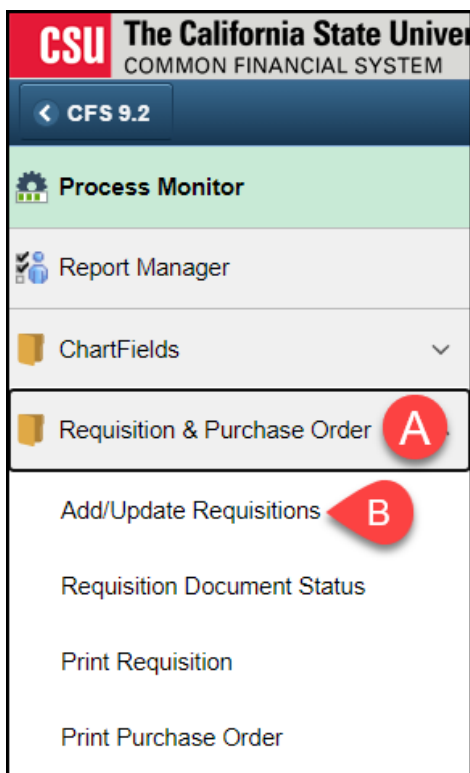## 2. Click on the CFS End User navigation tile.

💡 If you have added Add/Update Requisitions as a navigation tile to your personal CFS homepage, you can just click on the tile on your homepage. You can view instructions on adding a navigation tile for more information.

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A. Click on the **CFS End User** tile.
B. Or you click on the NavBar icon to navigate to NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions.

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3. Select Requisition & Purchase Order and then click Add/Update Requisitions.

4. Click the Add button.

⚠️   Do **not** change the Requisition ID from NEXT.

Requisitions

| Find an Existing Value | Add a New Value |

Business Unit   FLCMP 🔍

Requisition ID   NEXT

Add

5. In the Requisition Name, enter "Change Order – PO#xxxxxxxxxx" with the PO number you want to modify.
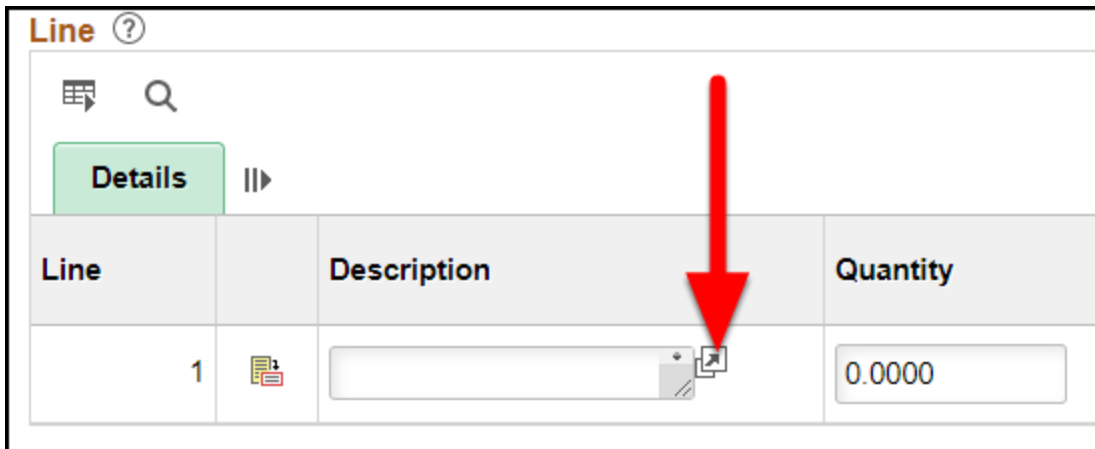
Maintain Requisitions
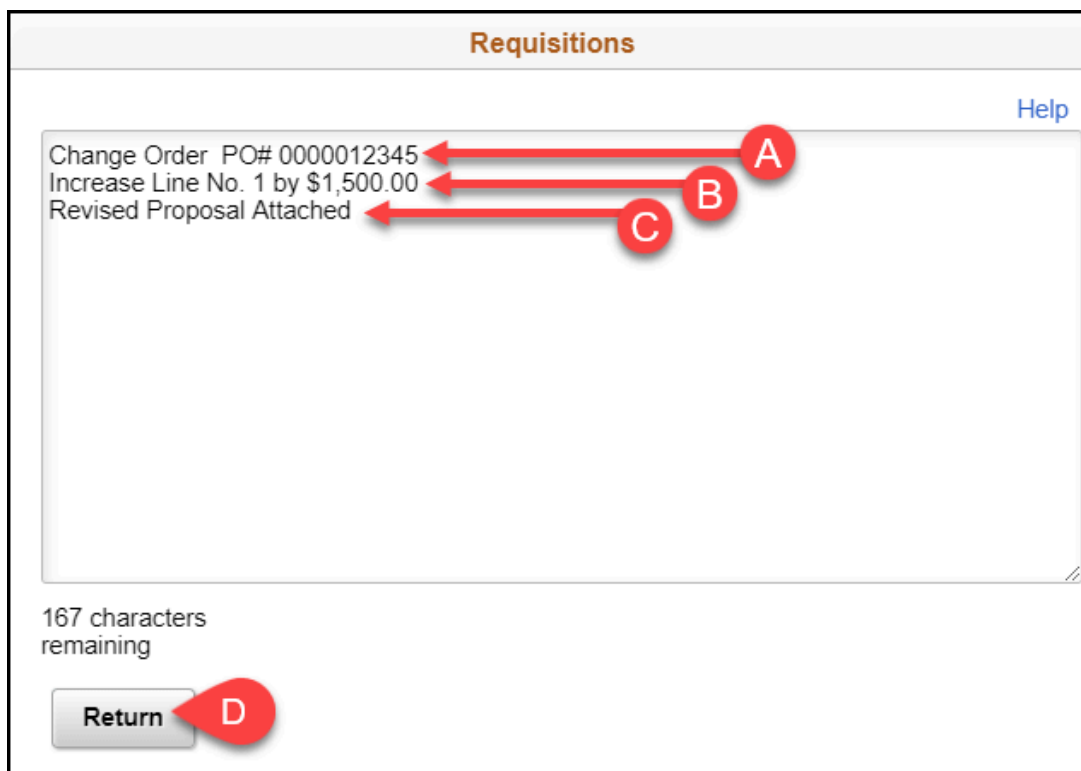**Requisition**

Business Unit   FLCMP

Requisition ID   NEXT

Requisition Name   Change Order – PO#0000012345

In the Requisition Name, enter "Change Order – PO#xxxxxxxxxx" where the x's are replaced by the Purchase Order ID number that you want to modify.

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6. Click on the Display Description icon to show all of the available space for the Description field.

7. Enter the change order information again, along with a reason for the change, and any comments. Then click Return.

A. Repeat the same "Change Order – PO#xxxxxxxxxx" from step 4 where the x's are the Purchase Order ID number you want to modify.

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B. Enter the modification you want to make/reason for the change.
C. Add any additional comments or notes you have for the change.
D. Click **Return**.

💡 Sample Descriptions

- Change Order PO# 0000012345
    - Decrease Line No. 2 by $500.00
    - (Proposal Attached)

- Change Order PO# 0000012345
    - Revise ChartFields to: 613001-THEFD-10125

- Change Order PO# 0000012345
    - Reduce PO to invoiced amount and close

- Change Order PO# 0000012345
    - Revise PO due date to: 11/25/2017

- Change Order PO# 0000012345
    - Increase license by 10 users
    - (Quote attached)

- Change Order PO# 0000012345
    - Close purchase order; set all lines to zero balance

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8. Click Add Comments.

9. Add any comments about your change order.

Enter other details for the change order or just put "see attached proposal."

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10. Use the Attach button to attach an updated proposal or quote (if applicable). Then click OK.

Associated Document

Attachment   THIS_IS_A_TEST_QUOTE.pdf   **A** →   Attach   View   Delete

From -> REQ FLCMP-NEXT

OK   **B**   ncel   Refresh

💡 If you have to attach multiple documents, you can combine them into a single file by:

- Add the PDFs to a .zip archive
- Use Adobe Acrobat Pro to combine the PDFs into a single PDF
- Print out all of the documents and use your department copier to scan them into a single PDF

A. Click **Attach**, select the file you want to attach, and then click Upload File.
B. Click **OK** once the file is attached.

11. Enter the Quantity as 1 and LOT as the UOM. For Price: if increase of funds is not needed enter 0.01; if increase of funds are needed, enter exact dollar amount). Enter the same Category and Supplier that were used on the original purchase requisition.

A. Enter **1** as the Quantity.
B. Enter **LOT** as the Unit of Measure (UOM).
C. Enter the same Category code that was used on the original purchase requisition.
D. Enter the **0.01 only** if the desired Change Order is not intended to add funds (ex. Change in Due Date, Edit of Scope of Work or reduction of funds). If the desired Change Order requires an increase in funds indicate the exact dollar amount of increase.
E. Enter the same Supplier ID that was used on the original purchase requisition.

12. Click on the Schedule icon at the end of the Line.

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13. Click on the Distribution icon.

14. Enter the chartfield associated with the change order. Then click OK.

If the change order is to modify the chartfield, you should enter the new chartfield you want to be used for the purchase order.

If the change order does not involve changing the chartfield, you should enter the same chartfield that was entered on the original purchase requisition.

Then click **OK.**

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15. Click Return to Main Page.

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16. Click Save at the bottom of the screen.

17. Use the Print Requisition process to generate a PDF of the change order and send it to the appropriate approver to approve.

[View instructions on sending a requisition for approval.](#)

[View instructions on approving a requisition.](#)

Need More Help?

Questions about how to do something in CFS? Contact IT Training at ittraining@fullerton.edu or 657-278-5647.

Questions about procurement policies or status of a requisition/purchase order? Contact Procurement at DL-C_and_P@fullerton.edu.

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