

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.

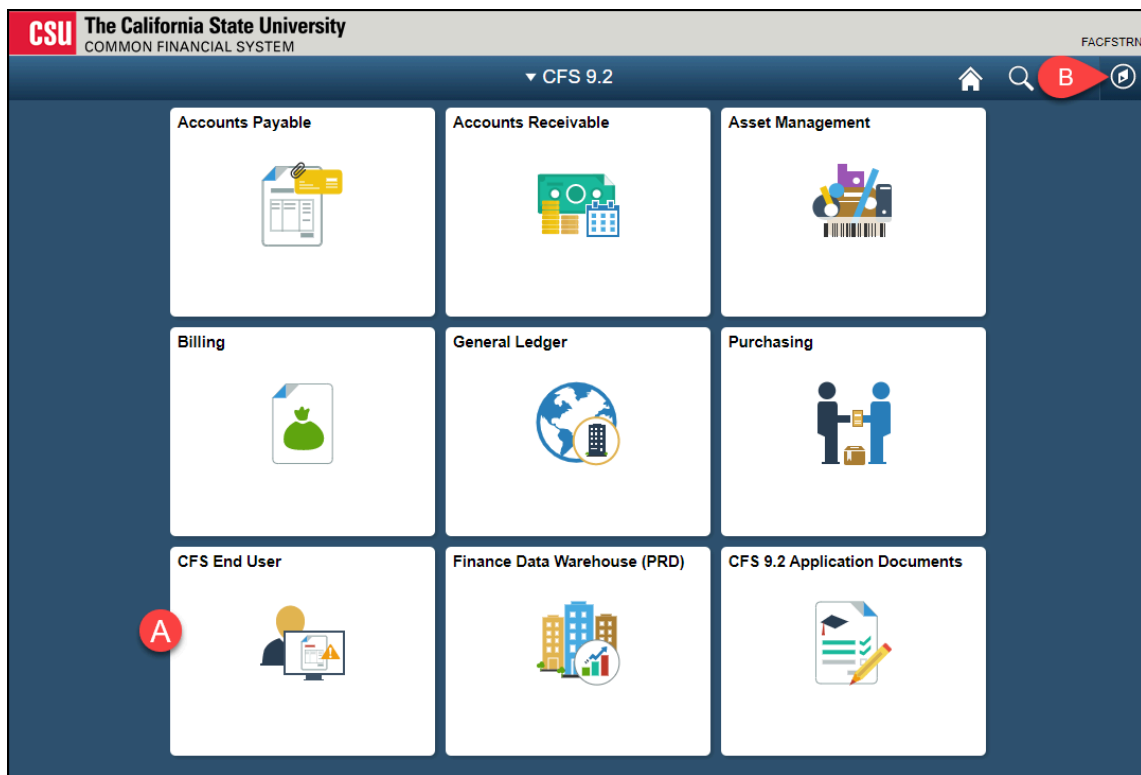
1. Log in to CFS from Titan Online on the campus portal.

[View How Do I Access CFS? for more information.](#)

2. Click on the CFS End User navigation tile.

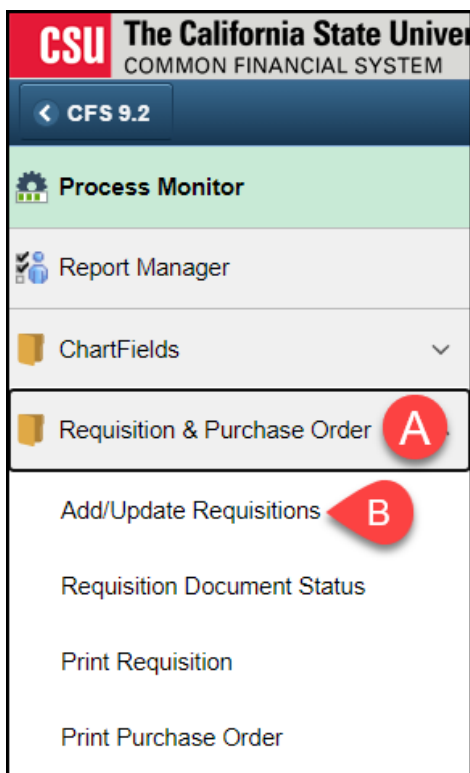


If you have added Add/Update Requisitions as a navigation tile to your personal CFS homepage, you can just click on the tile on your homepage. You can [view instructions on adding a navigation tile](#) for more information.



- 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.

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

Business Unit

Requisition ID

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

Maintain Requisitions

Requisition

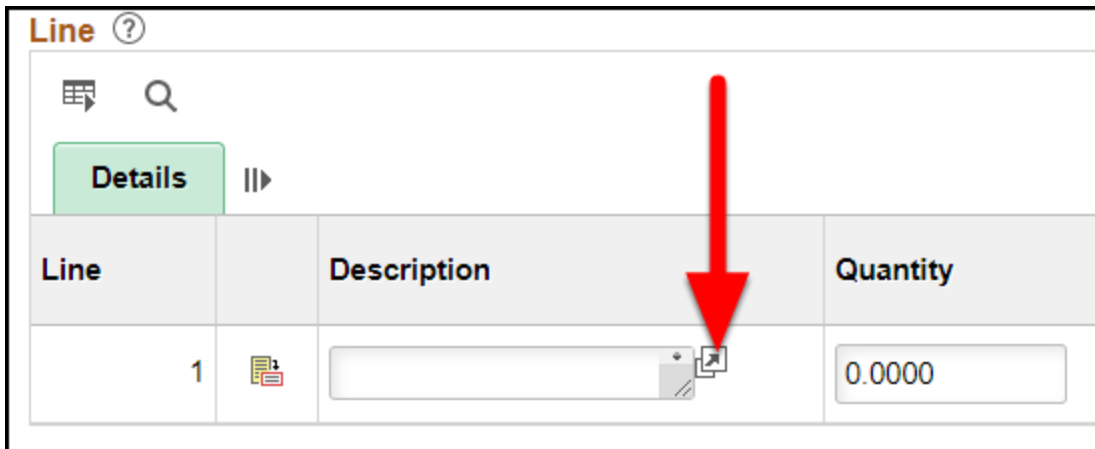
Business Unit

Requisition ID

Requisition Name

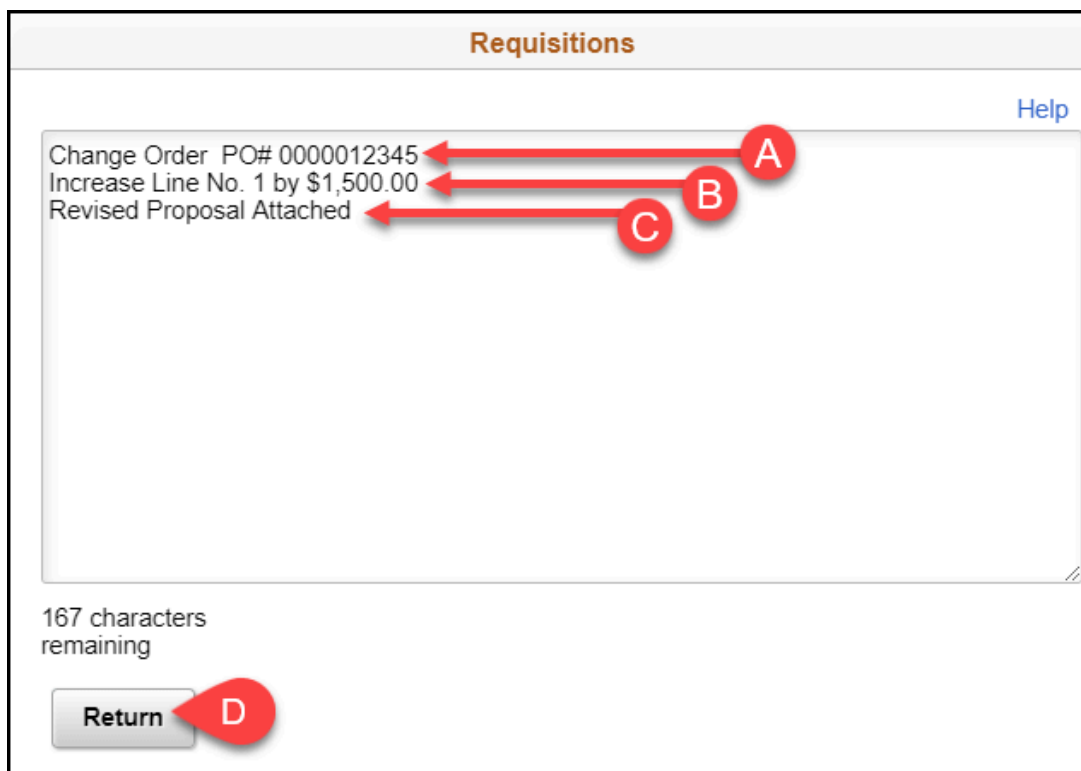
In the Requisition Name, enter "Change Order – PO#xxxxxxxxxx" where the x's are replaced by the Purchase Order ID number that you want to modify.

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



The screenshot shows a web interface for a 'Line' item. At the top, there's a 'Line' header with a question mark icon. Below it, a 'Details' button is highlighted in green. A table with the following columns is visible: 'Line', 'Description', and 'Quantity'. The first row shows 'Line' 1, a 'Description' field with a small icon at the end, and a 'Quantity' of '0.0000'. A large red arrow points to this icon, which is the 'Display Description' icon.

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



The screenshot shows a 'Requisitions' form. The main text area contains the following text: 'Change Order PO# 0000012345', 'Increase Line No. 1 by \$1,500.00', and 'Revised Proposal Attached'. Red arrows labeled A, B, and C point to this text. At the bottom left, there is a 'Return' button and a red arrow labeled D points to it. Below the text area, it says '167 characters remaining'.

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.

- 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

8. Click Add Comments.

▼ Header ?

*Requester

50802547190

Q

Solo,Han

*Requisition Date

02/18/2021

📅

Requester Info

Origin

ONL

Q

Online Entry

*Currency Code

USD

Dollar

Accounting Date

02/18/2021

📅

[Requisition Defaults](#)
[Requisition Activities](#)

Add Comments

9. Add any comments about your change order.

Comments

Q |

[Use Standard Comments](#)

Comment Status

Active

See attached revised proposal

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

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
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From -> REQ FLCMP-NEXT

OK

B Cancel

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.

Line	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status	Supplier	Supplier Name
1	Change Order PO#	1.0000	LOT	20400	0.01000	0.01	Open	0000000050	BOOK HOUSE

- 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.

Supplier	Supplier Name	Due Date
0000000050	BOOK HOUSE	<input type="text"/>   

13. Click on the Distribution icon.

Maintain Requisitions

Schedule

Business Unit: FLCMP Requisition Date: 02/18/2021
 Requisition ID: NEXT Status: Open
[Return to Main Page](#)

Line 1 of 1

1 Item [Change Order PO# 0000012345](#) Quantity: 1.0000 Batch Lot: Merchandise Amt

Schedule 1-1 of 1

Details ||>

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	REC V Q	1.0000	0.01000	0.01		Solo, Han	Active

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

Distributions 1-1 of 1

Chartfields Details Asset Information Budget Information ||>

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	100.0000	1.0000	0.01	FLCMF	616002 Q	THEFC Q	10356 Q	Q	Q	Q

OK Cancel Refresh

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**.

15. Click Return to Main Page.

Maintain Requisitions

Schedule

Business Unit

FLCMP

Requisition ID

NEXT

Return to Main Page

Line

1

Item

Change Order PO# 00

Schedule

Details

Sched		*Ship To		Quantity
1		RECV		1.0000

16. Click Save at the bottom of the screen.

Maintain Requisitions

Requisition

Business Unit: FLCMP
 Requisition ID: NEXT
 Requisition Name: Change Order – PO#0000012345

▼ **Header** ⓘ

*Requester: 50802547190 Solo, Han
 *Requisition Date: 02/18/2021 [Requester](#)
 Origin: ONL Online Ent
 *Currency Code: USD Dollar
 Accounting Date: 02/18/2021

[Requisition Defaults](#) [Edit Comm](#)
[Requisition Activities](#)

Add Items From ⓘ

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester](#)

Line ⓘ

Details ⓘ

Line	Description	Quantity
1	Change Order PO#	1.0000

[View Printable Version](#)

Save **Notify** **Refresh**

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.