Requesting a Change to a Purchase Order

The requisitioner may not make any changes to a purchase order. If you wish to change a purchase order, you need to submit a change order request, a combination of a form and a requisition, asking Procurement to make the changes for you. The change request will go through the same workflow process as your original requisition.

A change order is required when the voucher amount or quantity exceeds the tolerance level for the purchase order. This is called a match exception. If a match exception occurs, you will receive an email and a pending voucher in your worklist. You will need to follow the instructions below to submit the change request. Once the change requisition is approved and the changes to the purchase order have been made by Procurement, you must approve the voucher. Instructions for this process are in the job aid entitled Department Match Exception Process on the BuyWays Help page.

Before you begin, you will need to have at hand the number of the purchase order you want to change.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
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<tbody>
<tr>
<td>1.</td>
<td>On the BuyWays home/shop page, locate the <strong>Go to</strong> bar at the top of the page. Click on the <strong>forms</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>The Forms page will open. If necessary, click the + next to <strong>Shared</strong> on the left side to display <strong>Boston Forms</strong>, as shown below. Click on the <strong>Change Order Request</strong> link on the right side of the page.</td>
</tr>
</tbody>
</table>
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4. **On the left side of the form, enter:**
   - The number of the purchase order you want to change;
   - The name of the vendor in the Supplier Name field;
   - A detailed description of the changes you want made to the purchase order. Be sure to specify the number of each line you want changed.

5. If you want the changed purchase order to be sent to the vendor, select **Yes** in the **Send Revised PO to supplier** dropdown menu. Otherwise, select **No**.

6. **On the right side of the form, you must select at least one check box to indicate the type of change you requested in the text box on the left. You may select as many check boxes as apply.**

7. **To submit your change request form to a shopping cart, locate the Available Actions dropdown at the top right of the page.**
   
   Select **Add and go to Cart**
   
   Click **Go**.
   
   The system will display a new shopping cart that has been automatically created for you.

8. **Rename the shopping cart as you normally would. It is recommended that you specify that this is a change request and that you include the purchase order number.**

   ![Shopping Cart](image)

   **Name this cart:** Change Request for PO 8000000144

9. **Click **Update**.**

10. **Notice that the system has automatically filled in the Change Description (from the form), Unit Price (0.99), Quantity (1) and Total (0.99).**

    Enter the **Commodity Code**.

    ![Commodity Code](image)

11. **Click **Proceed to Checkout**.**

12. **Complete the requisition as you normally would.**

    The workflow bar will be displayed. The tab you are currently on will be in a
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Different color from the rest of the tabs. In each tab, 🔄 indicates an item that needs your attention and ✔️ indicates an item that is already completed.

The system will automatically take you to the first item you need to complete.

13. Shipping

Since you have already set up shipping addresses in your profile, you need to select the appropriate shipping address.

Click **Edit** in the Shipping box in the center of the page. The Ship To box will appear.

Click the **select from your addresses** dropdown menu. Select the appropriate address. Click **Save**.

Your next step will be to enter accounting codes (speedtype and account code).

14. Enter Speedtype and Account Code

Click on the **Accounting Codes** tab. Follow the steps immediately below if:

- You will use one speedtype to pay for all your line items
- You will split fund all your line items among multiple speedtypes
- All or most of your line items can be described by the same account code

Click on **Edit** at the far right of your screen, under the gray Accounting Codes bar.

Enter the speedtype that you used in your original purchase order or a new one that you are now requesting. **The 6-digit speedtype must be followed by –B.** Enter the correct account code, followed by –B.
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Click **Save**. The B must be in upper case. If you forget to add –B, you will not be able to proceed to the next step until you enter the speedtype and account code correctly. You may also search for the speedtype and account code by clicking on **Select from all values**.

There is no need to enter the Fund or Department. The speedtype and account code entered here apply to all lines in your requisition. Be sure to review the Fund and Department to make sure you entered the correct speedtype.

15. **Complete the Requisition**

Click on ![Final Review]

A summary of your requisition will be displayed.

To edit the requisition, click on the **Edit** button in the section you want to change. Make your change and click **Save**.

16. When your requisition is complete, click on ![Submit Requisition]

A **Requisition Information** page will appear.

17. **Approve Your Requisition (if you are the departmental approver)**

Click on the **PR Approvals tab** above the requisition summary. At the top right corner of the PR Approvals page, click on the **Available Actions** dropdown menu and select **Approve/complete step**. Click **Go**.

![Available Actions]

When all the necessary approvals have been secured and Procurement has made the requested changes to your purchase order, it will be re-submitted electronically to the vendor if you selected this option on the change request form.

If you submitted the change request to resolve a match exception, follow the steps on the job aid entitled **Department Match Exception Process**.