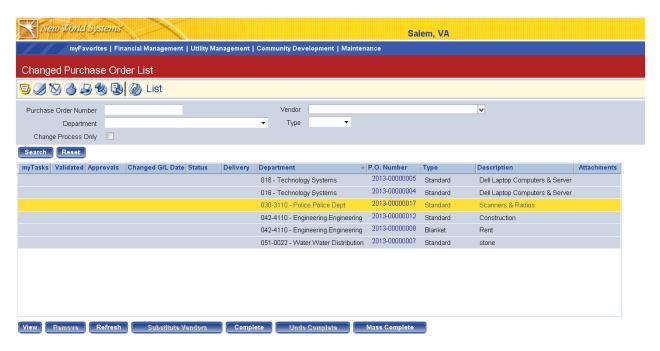# City of Salem, VA
New World Systems
Appendix B: Change Purchase Orders Processing

Financial Management → Procurement → Purchasing → Change Purchase Orders

Changed Purchase Order List: After all the Purchase orders get posted from the Purchase Order List they move to the Change PO List until they are either completed or pulled into an invoice and completed. Once the PO has been completed it will no longer show up on the Change PO List.

Search criteria in top part of screen allows you to search for specific purchase orders

Uncheck the "Change Process Only" checkbox to see all open purchase orders. When this box is checked, you only see the purchase orders with pending changes.

View: Highlight PO and hit view to see the details of the purchase order. This allows you to see the PO detail without putting the PO into an open change status

Remove: Highlight PO and hit the Remove button to remove the PO from an Open Change Status. Be aware that any PO that is in an open status will not be able to be pulled into an invoice until the change is complete or open status is removed

Refresh: Updates Change PO list to reflect most recent activity

Substitute Vendors: Allows you change the vendors on PO's that allow substitute vendors. Currently no PO types allow this option.
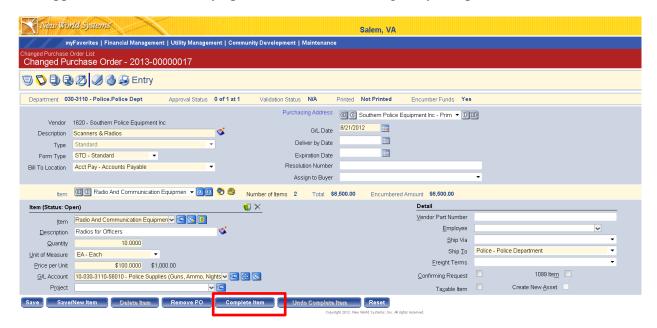
Updated: 10/31/2012

Complete: Highlight PO and hit complete once PO is complete. This will un-encumber any outstanding encumbrance amount and remove it from the Change PO list once it gets put through the Change PO workflow buttons. The completion must go through the Change Order process just like any other change to a purchase order. If no invoices have been charged against to PO, it will go to a "V-Pend", or Void Pending, status when you click the "Complete" button. If invoices have been charged against the PO, it will go to a "C-Pend", or Complete Pending, status.

> NOTE: If you forget to check "Completes Item" when entering an invoice for a purchase order and that purchase order is complete for all items, you can use this button to correct the error and complete the purchase order. Otherwise the PO will remain open indefinitely.

Undo Complete: Highlight a PO that's in a Complete Pending status and hit the "Undo Complete" button, this will remove the C-Pending status and put it back to an open purchase order.

Mass Complete: Used for marking multiple PO's complete at a time. Can run the open PO report to review all the open PO's (Financial Management → Reports → Purchasing → Open Purchase Order Report) and then use the mass complete button to select all of the purchase orders that should be complete.

PO Number: Click on the PO # if you want to edit the purchase order information. Once you click on the PO Number, it is automatically entered into the Change Process. The purchase order will appear with the same entry options as when it was originally completed.

Updated: 10/31/2012

Complete Item: If the purchase order is not complete, but you forgot to complete one specific item when you were entering an invoice for that purchase order, you can "Complete Item" at the bottom of the page once you have selected the correct item and it was marked that item as complete. Otherwise, the item will remain open indefinitely and the purchase cannot be closed even if the other items were appropriately marked complete.

Save: Click save once you have made all necessary changes

In order for the changes to take effect, the purchase order must be approved in the same approval process as the original purchase order. See "Purchase Order Processing" for detailed instructions on validations, approvals, printing, and posting. After the changed purchase order has been posted, it is available to be pulled into the invoice process.

Updated: 10/31/2012