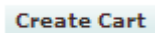


Requesting a Change to a Purchase Order

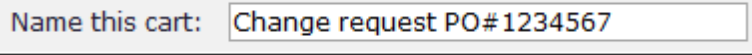
Step	Action
1.	Before creating any change request, you must verify that the Purchase Order you wish to change has a valid Budget Check in PeopleSoft Finance. If the PO has a budget error, you must resolve the error prior to requesting the change.

2.	Begin by navigating to the Carts button to insure that your Change Request is in a new Cart. From the BuyWays homepage, click the Shop icon in the top left side of the page, then "My Carts and Orders", followed by "View Draft Shopping Carts".
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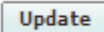
Click the **Create Cart** button.



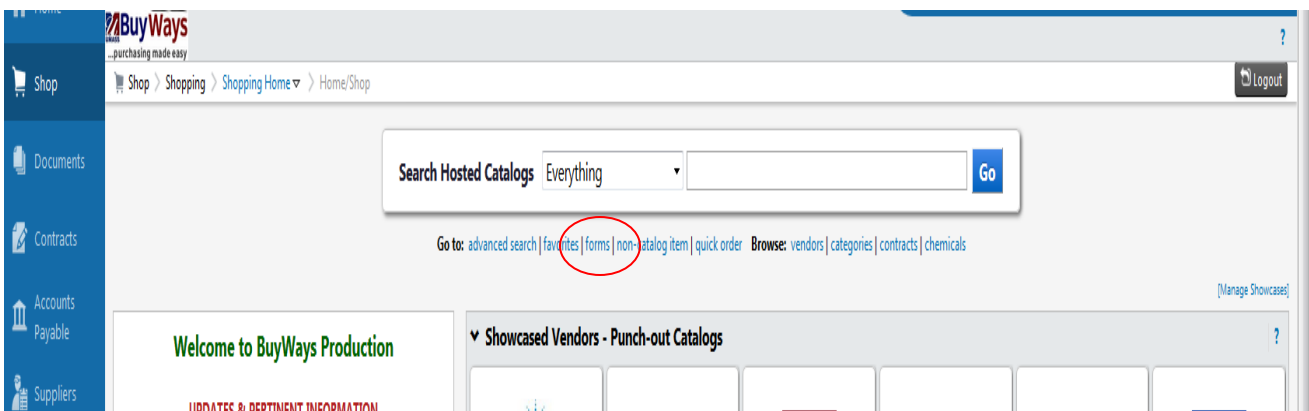
3.	Rename your Cart to reflect this particular Change Order.
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Select the **Update** button.

Have you made changes? 

4.	Next, in the middle of the page select "Click here to start shopping". The Home Page should open up again and you should see a small link for "forms" in the top/middle of the page in the Goto section. When you select "forms" you will see a small list of Dartmouth forms (Change Order and Direct Payment form) available for use.
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5.	Select the Change Order Request form link.
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Step	Action
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6. Complete the form.

Under the **Purchase Order Information** block, enter the **Purchase Order Number** to be changed and the **Supplier Name**. Please include all ten characters of the Purchase Order number and check for accuracy.

Purchase Order Number	<input type="text"/>
Supplier Name	<input type="text"/>

7. In the **Change Description** box, explain in detail exactly what needs to be changed. Make sure to include the line number(s) that the change(s) impacts. This information will be read by individuals in the Purchasing Department, so clarity is important.

Please describe the required change(s) for this PO in detail:	
Please specify Line Number(s)	
Change Description	<input type="text"/>

8. Indicate whether the revised PO should be sent to the supplier in the **Send Revised PO to Supplier** box.

Click the drop-down arrow and select either **Yes** or **No**.

Send Revised PO to Supplier	Please select... ▼
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9. If the change requires an attachment, you may add it by selecting the **add attachment** link.

Internal Attachments ?
add attachment...

Step	Action
10.	On the right hand side of the form, under Change Order Request Details , select the type(s) of change(s) that the Change Order addresses.

11. After completing the form, go to the top right side of the page and select Add and go to Cart from the drop-down list of Available Actions.

Available Actions: Add and go to Cart

Select the Go button.

Go

12. The Active Cart page appears.

Select the Commodity Code that is most appropriate for the requested change(s).

Note: The Commodity Code should match the one that is on the order. If more than one code is involved in the change, select the code that impacts the most dollars.

Commodity Code

✖ Required field

13. Select the Proceed to Checkout button.

Proceed to Checkout

14. Review the Requisition links and make any additions/changes that you deem necessary to the required fields.

Note: All tabs must contain a green checkmark to qualify for submittal to Workflow.

✔ General

✔ Shipping

✔ Billing

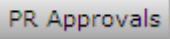
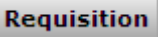

✔ Accounting Codes

✔ Internal Notes and Attachments

✔ External Notes and Attachments

✔ Final Review

Note: To insure proper Workflow, the budget selected for the Change Request (Accounting Codes link) must match the budget on the Purchase Order.

Step	Action
15.	<p>On the Final Review link, review the PR Approvals tab to see the Workflow steps involved for the Change Order.</p>  A rectangular button with a light gray background and the text "PR Approvals" in a dark gray font.
16.	<p>Select the Requisition link to access the Submit Requisition button.</p>  A rectangular button with a light gray background and the text "Requisition" in a dark gray font.
17.	<p>Select the Submit Requisition button to enter the change request into Workflow.</p>  A rectangular button with a yellow-to-orange gradient background and the text "Submit Requisition" in a dark gray font.
18.	<p>Congratulations! You have successfully created a Change Request Order. You may view the progress of the Requisition through Workflow by opening the Requisition in Document Search and viewing the PR Approvals tab.</p> <p>End of Procedure.</p>