

Computer Based Training

[Menu](#)[Back](#)[Next](#)[End](#)

Lesson 5: Objectives

- ❖ Creating a Change Order
- ❖ Changing a Spend Request
- ❖ Filling Out a Change Order
- ❖ Completing Change Orders

Lesson 5: Creating a Change Order

A Change Order allows you to make a change to an existing Entity in the system.

For example, let's assume that we want to add an additional laptop to Order CP2952954 below. This would require a change in the quantity of laptops we are ordering, as well as a change in the approved funds.

To make this change, we will create a Change Order against the original Spend Request.

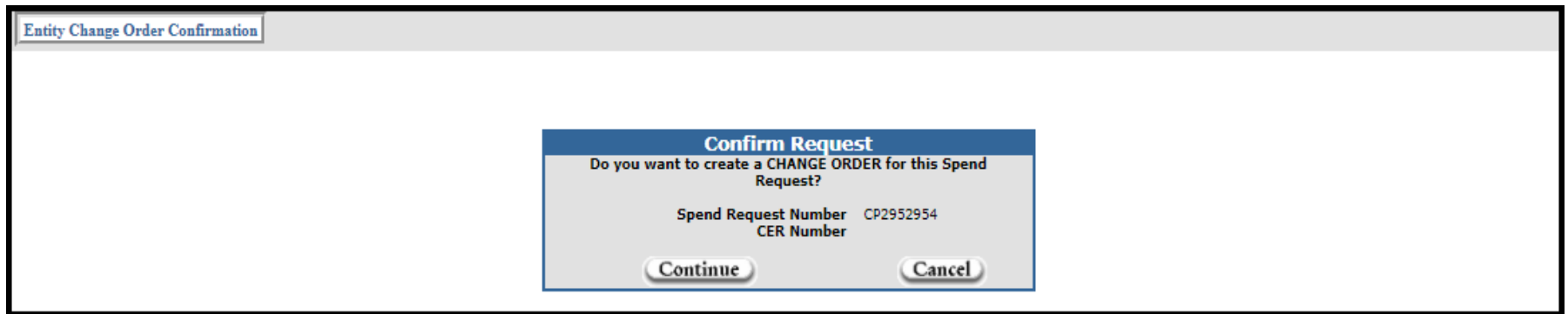
We can locate the Spend Request that we want to change by using the Entity Search screen (explained in Lesson 2).

Approved	CP2952954 Data Field Services		Diane	12/14/2017	6,695.00	Diane	Change Order	Print	Copy	Select
	Expires			12/14/2017						

If an Entity can be changed, the Change Order link will be under the Entity Number. Click the **Change Order** link to start a Change Order.

Lesson 5: Change Order Confirmation

After you click the **Change Order** link, this screen will be displayed.

A screenshot of a web application window titled "Entity Change Order Confirmation". Inside the window is a modal dialog box with a blue header "Confirm Request". The dialog asks "Do you want to create a CHANGE ORDER for this Spend Request?". It displays "Spend Request Number CP2952954" and "CER Number". At the bottom are "Continue" and "Cancel" buttons.

Entity Change Order Confirmation

Confirm Request
Do you want to create a CHANGE ORDER for this Spend Request?

Spend Request Number CP2952954
CER Number

Continue Cancel

Click **Continue** to proceed with create a Change Order.

Lesson 5: Change Order Screen

Change Order

Original Spend Request Data

Date & Time	12/19/2017 10:28:24	Requested By	Diane	Record #	2772487
Change Order	CP2952954-C04	Requested For	Sam	Invoice Due Date	00/00/0000
Business Unit	Data Field Services	Ship To	Brea * 3075 E. Imperial Highway * Brea, CA * United States	Classification	Capital Items
Status	Submitted				
CER Number					
Chg Code	100.000% - 010336 *				
Entity X-Ref #		Original Entity Notes:	12/14/2017		
Approvals	View Routing				

Blanket PO Fields	PO Type	Frequency	Begin Date	End Date	Total SR Approved Amt	Remaining Amt
United States Dollars	Standard	None	12/14/2017	12/14/2017	6,695.00	0.00

Net	Shipping	Handling	Duties	Tax	Entity Total	USD Total
6,695.00	0.00	0.00	0.00	0.00	6,695.00	6,695.00

Revised Spend Request Data

Blanket PO Fields	PO Type	Frequency	Begin Date	End Date	Total SR Approved Amt	Remaining Amt
United States Dollars	Standard	None	12/14/2017	12/14/2017	6695.00	0.00

Change Entity Notes

Priority: Normal

Reject Reason:

Action * Choose Action *

Approve or Reject * Process

Attachments

* Indicates Required Field

Lesson 5: Change Order Screen

The bottom of the Change Order screen contains the fields that allow you to describe the changes you want to make to the order.

Revised Spend Request Data

Blanket PO Fields

United States Dollars

PO Type

Standard ▼

Frequency

None ▼

Begin Date

12/14/2017 39

End Date

12/14/2017 39

Total SR Approved Amt

6695.00

Remaining Amt

0.00

Change Entity Notes

Priority

Normal ▼

Reject Reason

Action *

* Choose Action * ▼

Approve or Reject *

Process

Attachments

* Indicates Required Field

Line	Material Group	Vendor	Mfr	MFR Part No	Product Name	SLA	Qty	Price	Ext Amt	Status	ETA	Rec'd
1	PC/LAN - LAPTOP (Asset Tag Required)	SOFTWARE HOUSE INTERNATIONAL INC	HEWLETT-PACKARD	KV634AW#ABA	HP Lightweight 2510p Core 2 Duo U7700 2G	None	5	1,339.00	6,695.00	Order Detail		
Override Primary Ship To:					G/L Account: 16199999-999997				Taxable: <input checked="" type="checkbox"/>			
Line Note:												

Since the change we want to make is quantity and amount related, we can leave the PO Type, Frequency, and Dates alone in this case. However, these fields are able to be changed, if needed.

Since we are ordering two of these laptops, we need to double the Total Spend Request Approved amount, and fill in the Change Entity Notes with our request.

Menu

Back

Next

End

Lesson 5: Filling Out a Change Order

We have increased the Total Spend Request Approved amount, added the change description in the Change Entity Notes field, and also entered our Approval Code and Action. Click the Process button to submit the Change Order for review.

Revised Spend Request Data

Blanket PO Fields

United States Dollars

PO Type

Standard ▼

Frequency

None ▼

Begin Date

12/14/2017 30

End Date

12/14/2017 30

Total SR Approved Amt

10000.00

Remaining Amt

0.00

Change Entity Notes

Increase SR total to \$10,000

Priority

Normal ▼

Reject Reason

Action *

Approve Order ▼

Approve or Reject *

Process

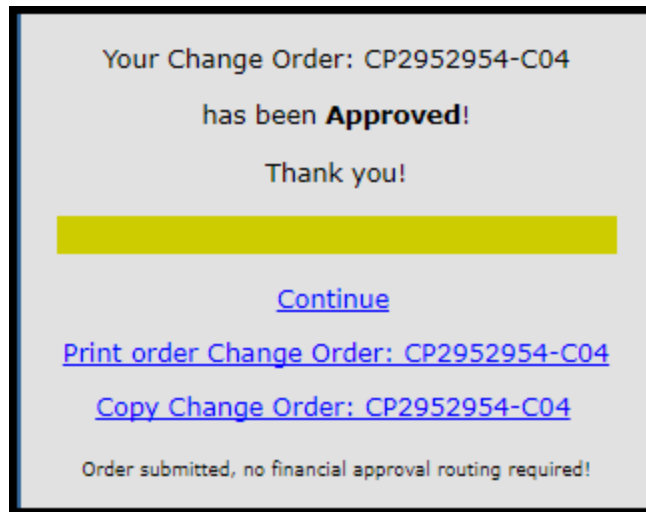
Attachments

* Indicates Required Field

Since this Change Order requires additional funds, it will automatically be routed through the Approval chain again. This only happens if there is an increase to an order amount, or in other situations where the Approvers of a Spend Request would need to give their approval again.

Lesson 5: Completing Change Orders

You should see this message when you finish approving your Change Order.



Your Change Order will automatically be routed for additional approvals (if needed), then it will be routed to a Prorizon Procurement Specialist. The Procurement Specialist will make any additional changes you requested in the Change Order Notes field, and finally process the order.

Please remember to fill out the Change Order Notes field with a complete description of the changes you want made. It is also helpful to attach any files you have that document the change and include a phone number, just in case the Procurement Specialist has questions about the change.

Lesson 5: Change Orders Complete!

- ❖ To continue with the next lesson, please press the Next button
- ❖ To review this lesson, please press the Back button
- ❖ To return to the CBT menu, please press the Menu button
- ❖ To end CBT Training, please press the End button

[Menu](#)[Back](#)[Next](#)[End](#)

Thank You For Your Viewing The Prorizon Active SCM CBT Training Module



USA

**If you have questions,
please give us a call at
001-770-579-1323
or contact us at
support@prorizon.com**

Back