

# Change Purchase Order-New World Systems

## Change A Purchase Order

From the home screen go to

→Financial Management →Procurement→Purchasing→Change Purchase Orders

The screenshot shows the 'City of Manteca' dashboard. On the left, a navigation menu is open, highlighting 'Procurement' and then 'Purchasing', where 'Change Purchase Orders' is circled in red. The main area shows a 'myCalendar' for 08/28/2018 with a message 'There are no items to show in this view'. Below the calendar is a 'myTasks' table with columns for Source, Approval Status, Transaction ID, Description, and Attachments. The table lists several tasks related to bank accounts and health insurance. At the bottom, there is a 'myNotifications' section with a table of vendor change requests.

→ Uncheck 'Change Process Only'

→ Click 'Search'

The screenshot shows the 'Changed Purchase Order List' interface. At the top, there are search filters for 'Purchase Order Number', 'Vendor', 'Department', and 'Type'. A 'Change Process Only' checkbox is unselected and circled in red. Below the filters are 'Search' and 'Reset' buttons, with 'Search' also circled in red. The main area contains a table with columns: my tasks, Validated, Approvals, Changed G/L Date, Status, Delivery, Department, P.O. Number, Type, Description, and Attachments. The table lists various purchase orders with their descriptions and attachments. At the bottom, there are navigation buttons: View, Remove, Refresh, Substitute Vendors, Complete, Undo Complete, and Mass Complete.

→ Place mouse over the PO number to get a detail box

Changed Purchase Order List Hide Search

Purchase Order Number     Vendor  
 Department     Type  
 Change Process Only

[Search](#) [Reset](#)

myTasks	Validated	Approvals	Changed G/L Date	Status	Delivery	Department ▲	P.O. Number	Type	Description	Attachments
						PW_WA - Public Works.Water	2018-00000043	Standard	Replacement Solenoid Valve	
						PW_WA - Public Works.Water	2018-00000058	Standard	Provide annual chlorine deliv...	
						PW_WA - Public Works.Water	2018-00000011	Standard	2 Carport structures for prote...	
						Transit - Transit	2018-00000474	Standard	AVL	
						Transit - Transit	2018-00000443	Standard	Westgare Center for Manage...	
						Transit - Transit	2018-00000473	Standard	Post Mount Display (info post)	
						Transit - Transit	2018-00000030	Standard	Replacement and Expansion...	
						Transit - Transit	2017-00000413	Standard	Replace fire door release de...	
						Transit - Transit	2018-00000471	Standard	Bus Passes	
						Transit - Transit	2018-00000472	Standard	Bus Stop Signs	

Items: 101 - 147 of 147

[View](#) [Remove](#) [Refresh](#) [Substitute Vendors](#) [Complete](#) [Undo Complete](#) [Mass Complete](#)

**Changed Purchase Order Information**

Form Type: Standard - Standard

Resolution Number: [blank]

G/L Date: 05/03/2018

Deliver by Date: [blank]

Vendor: The Sign Center

Total Amount: \$7,532.37

Validated: [blank]

Approvals: [blank]

Created By: La Sandra Sipp

Created Date: 05/03/2018

Changed By: [blank]

Changed Date: [blank]

Reason Code: [blank]

Reason Text: [blank]

→ Click on the PO to be changed. Once you click the PO it assumes you are making a change and the approval process will have to be done again.

Changed Purchase Order List Q

Purchase Order Number     Vendor  
 Department     Type  
 Change Process Only

[Search](#) [Reset](#)

myTasks	Validated	Approvals	Changed G/L Date	Status	Delivery	Department ▲	P.O. Number	Type	Description	Attachments
						PW_WA - Public Works.Water	2018-00000043	Standard	Replacement Solenoid Valve	
						PW_WA - Public Works.Water	2018-00000058	Standard	Provide annual chlorine deliv...	
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						Transit - Transit	2018-00000471	Standard	Bus Passes	
		0 of 1 at 1		Open		Transit - Transit	2018-00000472	Standard	Bus Stop Signs	

Items: 101 - 147 of 147 ← Previous Page Page 3 of 3

[View](#) [Remove](#) [Refresh](#) [Substitute Vendors](#) [Complete](#) [Undo Complete](#) [Mass Complete](#)

- Make all of the necessary changes
- Click 'Save'

Changed Purchase Order List  
 Changed Purchase Order - 2018-00000472 ◀ Prev Next ▶

Entry

Department Transit - Transit Approval Status 0 of 1 at 1 Validation Status N/A Printed Not Printed Encumber Funds Yes

Vendor 8949 - The Sign Center Purchasing Address The Sign Center - Primary

Description Bus Stop Signs G/L Date 8/28/2018

Type Standard Deliver by Date

Form Type Standard - Standard Expiration Date

Bill To Location Transit - Manteca Transit Center Resolution Number

Assign to Buyer

Item Building Maintenance & Supplies Number of Items 1 Total \$7,532.37 Encumbered Amount \$7,532.37

**Item (Status: Open)**

Item Building Maintenance & Supplies

Description

Quantity 1.0000

Unit of Measure EA - Each

Price per Unit \$7,532.3700 \$7,532.37

G/L Account 190.00.00.900-8400.02 - Capital Improvements-Transit Bus Stc

Project 16059-16059Q - Transit Passenger Amenities, Transit P

Contract

**Detail**

Vendor Part Number

Employee

Ship Via

Ship To Transit - Manteca Transit Center

Freight Terms

Confirming Request  1099 Item

Taxable Item  Create New Asset

Save Save/New Item Delete Item Remove PO Complete Item Undo Complete Item Reset Contract Items

→ 'Bread Crumb' back to the 'Changed Purchase Order List'

Changed Purchase Order List  
 Changed Purchase Order - 2018-00000472 ◀ Prev Next ▶

Entry

Department Transit - Transit Approval Status 0 of 1 at 1 Validation Status N/A Printed Not Printed Encumber Funds Yes

Vendor 8949 - The Sign Center Purchasing Address The Sign Center - Primary

Description Bus Stop Signs G/L Date 8/28/2018

Type Standard Deliver by Date

Form Type Standard - Standard Expiration Date

Bill To Location Transit - Manteca Transit Center Resolution Number

Assign to Buyer

Item Building Maintenance & Supplies Number of Items 1 Total \$7,532.37 Encumbered Amount \$7,532.37

**Item (Status: Open)**

Item Building Maintenance & Supplies

Description

Quantity 1.0000

Unit of Measure EA - Each

Price per Unit \$7,532.3700 \$7,532.37

G/L Account 190.00.00.900-8400.02 - Capital Improvements-Transit Bus Stc

Project 16059-16059Q - Transit Passenger Amenities, Transit P

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**Detail**

Vendor Part Number

Employee

Ship Via

Ship To Transit - Manteca Transit Center

Freight Terms


Confirming Request  1099 Item

Taxable Item  Create New Asset

Save Save/New Item Delete Item Remove PO Complete Item Undo Complete Item Reset Contract Items

## Purchase Order Validation


**\*\*Any time a change is made you must go back through the approval process\*\***

- Click on the Validation Button 
- Check the box next to the PO to be validated, or the top box to select all PO's.
- Click Submit



<input type="checkbox"/>	Validated	Changed G/L Date	Status	Delivery	Department ▲	P.O. Number	Type	Description
<input checked="" type="checkbox"/>	✓	05/17/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2018-00000492	Standard	Playground Resurfacing
<input type="checkbox"/>	✓	07/31/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2018-00000538	Standard	Bella Vista Park Pump
<input type="checkbox"/>	✓	07/27/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2019-00000036	Standard	REPLACE 30-HP Submersible Pump Motor - T...
<input type="checkbox"/>	✓	04/16/2018	Open		PW_Fleet - Public Works.Fleet Maintenance	2018-00000420	Standard	CA WELDING - TIG WELDER
<input type="checkbox"/>	✓	06/05/2018	Open		PW_SE - Public Works.Sewer	2018-00000395	Standard	Inspect & Service Automatic Transfer Switch
<input type="checkbox"/>	✓	08/28/2018	Open		Transit - Transit	2018-00000472	Standard	Bus Stop Signs

## Print Edit & Error Listing


- Click on the Print Edit & Error Listing 
- Check the box next to the PO to be printed, or the top box to select all PO's.
- Click Submit

*This will be the report you will use to attach to all backup for each PO in the batch and submit to Finance*










<input type="checkbox"/>	Validated	Changed G/L Date	Status	Delivery	Department ▲	P.O. Number	Type	Description
<input checked="" type="checkbox"/>	✓	05/17/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2018-00000492	Standard	Playground Resurfacing
<input type="checkbox"/>	✓	07/31/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2018-00000538	Standard	Bella Vista Park Pump
<input type="checkbox"/>	✓	07/27/2018	Open		Parks & Rec_Parks - Parks & Recreation...	2019-00000036	Standard	REPLACE 30-HP Submersible Pump Motor - T...
<input type="checkbox"/>	✓	04/16/2018	Open		PW_Fleet - Public Works.Fleet Maintenance	2018-00000420	Standard	CA WELDING - TIG WELDER
<input type="checkbox"/>	✓	06/05/2018	Open		PW_SE - Public Works.Sewer	2018-00000395	Standard	Inspect & Service Automatic Transfer Switch
<input type="checkbox"/>	✓	08/28/2018	Open		Transit - Transit	2018-00000472	Standard	Bus Stop Signs

## Purchase Order Approval

- Click on the Purchase Order Approval 
- Check the box next to the PO to be approved, or the top box to select all PO's.
- Click Submit

### Changed Purchase Order Approval

       | Approval

<input type="checkbox"/>	Validated	Changed G/L Date	Status	Delivery	Department ▲	P.O. Number	Type	Description
<input checked="" type="checkbox"/>	✓	05/17/2018	Open		Parks & Rec_Parks - Parks & Recreation....	2018-00000492	Standard	Playground Resurfacing
<input type="checkbox"/>	✓	07/31/2018	Open	 ✓	Parks & Rec_Parks - Parks & Recreation....	2018-00000538	Standard	Bella Vista Park Pump
<input type="checkbox"/>	✓	07/27/2018	Open		Parks & Rec_Parks - Parks & Recreation....	2019-00000036	Standard	REPLACE 30-HP Submersible Pump Motor - T...
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<input type="checkbox"/>	✓	06/05/2018	Open		PW_SE - Public Works.Sewer	2018-00000395	Standard	Inspect & Service Automatic Transfer Switch
<input type="checkbox"/>	✓	08/28/2018	Open		Transit - Transit	2018-00000472	Standard	Bus Stop Signs