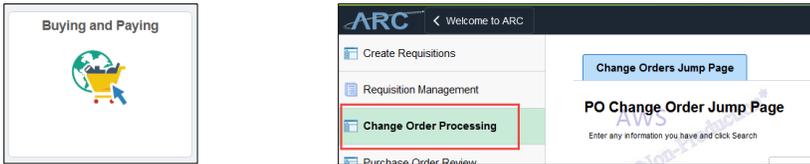


Normally, if you take no action on a Purchase Order at Fiscal Year End (June 30), the Purchase Order will close automatically. However, if you want to close a Purchase Order prior to the Fiscal Year End, you will need to submit a Change Order. This job-aid details the steps for creating a Change Order for a Purchase Order where no Vouchers were applied against it (no invoices were paid).

### Closing a Purchase Order with No Invoices Paid

#### Creating the Change Order

1. Click the **Buying and Paying** tile and then click the **Change Order Processing** tab.



Or, click the **NavBar > Main Menu > Purchasing > Purchase Orders > PO Change Order Jump Page**. The PO Change Order Jump Page Appears

Business Unit	PO ID	PO Date	Supplier ID	Short Supplier Name	Supplier Name	PO Status	Checking Header Status
1							

3. Enter the **PO Number** or other Search attributes.
4. Click **Search**. The Search Result appears.

Business Unit	PO ID	PO Date	Supplier ID	Short Supplier Name	Supplier Name	PO Status	Checking Header Status
1 COLUM	0000073326	07/05/2016	0000010007	APPLE INC-001	APPLE INC	Dispatched	Valid

5. Select the PO you want to close from the Search Results.
6. Select *Price/Quantity* from the **Change Type** dropdown.
7. Click **Create Change Order**. The Maintain Purchase Order page appears.

### Changing the Merchandise Amount

1. Click the **Attributes** tab under the Lines section.

2. Select the **Amount Only** flag for each Line if it is not already selected.

Confirm the popup Message regarding the PO Quantity.

3. Click the **Details** tab.

4. Change the **Price** and **Merchandise Amount** fields for all Lines to 0.00.

Confirm the popup Messages regarding the creation of a Change Order and allocating the changed amounts on the distribution.

5. Go back to the **Attributes** tab and un-check the **Amount Only** checkbox.

### Changing Distribution/ChartField Settings

1. Go back to the **Details** tab.
2. On the first Line of the PO, click the **Schedule** icon.

Merchandise Amount	Status			
0.00	Approved			

The Schedules page appears.

Maintain Purchase Order

### Schedules

Unit: COLUM Supplier: APPLE INC-001 PO Status: Dispatched  
 PO ID: 0000081271 PO Date: 11/10/2016

Return to Main Page

Lines Find | View All | First 1 of 4 | Last

Line	Item	MacBook Pro 15-inch with Touch Bar - PO Qty	1,0000	EA	Merchandise Amt	USD
Schedules Personalize   Find   View All   First 1 of 1   Last						
Details   Statuses   Shipment   Matching   Receiving   Freight   RTV						
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	11/10/2016	701W168THS	1,0000	0.00000	0.00	Active

Add Ship To Comments

Save & Submit | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

3. Click the **Distribution/ChartFields** icon.
- The Distributions page appears.

### Distributions for Schedule 1

Unit: COLUM Supplier: APPLE INC-001  
 PO ID: 0000081271 Item: MacBook Pro 15-inch with Touch Bar - Space Gray  
 Line: 1 Status: Active  
 Schedule: 1

\*Distribute By: Quantity  
 \*Liquidate By: Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty: 1,0000  
 Merchandise Amount: USD  
 Doc. Base Amount: 0.00 USD

Distribution Personalize | Find | View All | First 1 of 1 | Last

ChartFields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Dept	PC Bus Unit	Project	Activity
1	Open	100.0000	1,0000		USD	COLUM	63202	7503202	GENR	UR005349	01

OK | Cancel | Refresh

4. Change the **Distribute By** dropdown to *Quantity*.
5. Change the **Liquidate By** dropdown to *Quantity*.
6. Click **OK** to go back to the Schedules page and click **Return to Main Page**.

Return to Main Page

Lines

Line	Item
1	

Schedules

7. Repeat steps 2 through 6 for each Line of the PO.

### Saving and Submitting

1. Click the **Budget Check** icon.

Maintain Purchase Order  
Purchase Order

Business Unit COLUM PO ID 0000081271  
PO Status Dispatched Budget Status Not Chkd

Copy From [dropdown]  
Hold From Further Processing

Header  
\*PO Date 11/10/2016 Supplier Search  
\*Supplier APPLE INC-001 Supplier Details  
\*Supplier ID 0000010007 APPLE INC  
\*Buyer 902185 Johnson, Wendy R

Backorder Status Not Backordered Create Back Order  
Receipt Status Not Recvd  
\*Dispatch Method Print Search

Amount Summary  
Merchandise 0.00  
Freight/Tax/Misc. 0.00  
Total Amount 0.00 USD  
Encumbrance Balance 23,622.00 USD  
Calculate

Add Items From [dropdown] Select Lines To Display [dropdown]  
Search for Lines Line [input] To [input] Retrieve

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	MacBook Pro 15-inch with Touch Bar - Space Gray		1.0000	EA	43211500	0.000000	0.00	Approved
2	Mac 27-inch with Retina 5K display		1.0000	EA	43211500	0.000000	0.00	Approved
3	MacBook Pro 13-inch with Touch Bar - Space Gray		1.0000	EA	43211500	0.000000	0.00	Approved
4	MacBook Pro 15-inch with Touch Bar - Space Gray		1.0000	EA	43211500	0.000000	0.00	Approved

Save & Submit Return to Search Previous in List Next in List Notify Refresh Add Update/Display

2. Click **Save & Submit**. The Reason Code and Comment page appears.

Enter a reason code and comment for making changes that are being tracked.

Unit COLUM PO ID 0000067031

Reason Code [input]  
Comment [text area]

Use Same Reason Code

OK Cancel Refresh

3. Click the **Search** icon to select a **Reason Code** and selecting the appropriate reason from the list.

Look Up Reason Code

SetID: CUSSET  
Reason Type: Procurement Change  
Reason Code: [input] begins with  
Description: [input] begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-14 of 14 Last

Reason Code	Description
ADDPOTERMS	Additional PO terms required after issuance
ADDTIME	Additional Time Required for Original Scope
ADDOVALUE	Additional Value Required for Original Scope
CANCELPO	Cancel PO for performance issues
CANCONFUND	Cancel PO due to non-availability of funding
CANFORCONV	Cancel purchase order for convenience
CLOSEDPO	Close PO due to completed scope of work
EXCHANGE	Cost Adjustment Due to Exchange Rate Change
LABORRATE	Add'l cost due to raw material/labor rate change
NEWGRANT	Add value due to new available grant/fund
NEXTPHASE	Next Phase(s) of a Multi-Phase Project
REDUCE	Reduction of PO Value/Quantity
SHIPTOL	Shipping & Handling Exceed AP Tolerance
TIMEVALUE	Additional Time Value Required for Original Scope

4. Type any additional **Comments** and click **OK**.

### Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>