PR344 Modifying Purchase Orders and Creating Change Orders (VDOT Only)

Modifying Purchase Orders and Creating Change Orders Overview

This Job Aid provides instructions for managing changes to Purchase Orders in Cardinal. Users can make updates that either do or do not generate Change Orders. Updates that affect only internal record-keeping, such as modifications to accounting distributions, do not create Change Orders or notify the supplier. Changes to quantities, prices, delivery dates, delivery locations, or the cancelation of lines or schedules will generate a numbered Change Order that is sent to the supplier for action.

For instructions on reconciling and closing a partially received Purchase Order, see the Job Aid titled **PR344 Reconciling a WebIMS Purchase Order (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

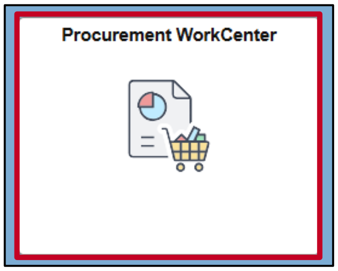
Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

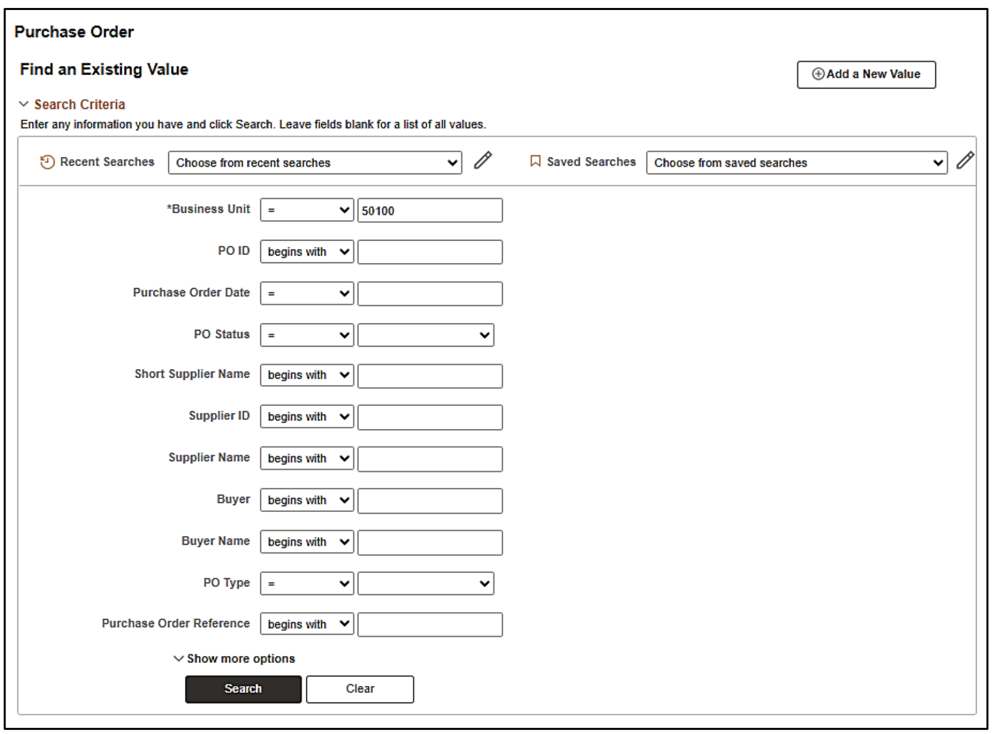
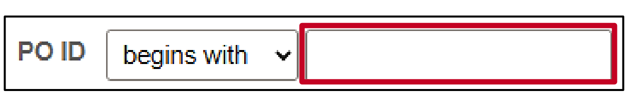
Table of Contents

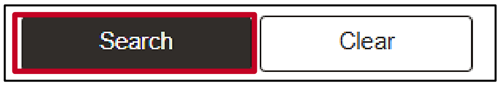
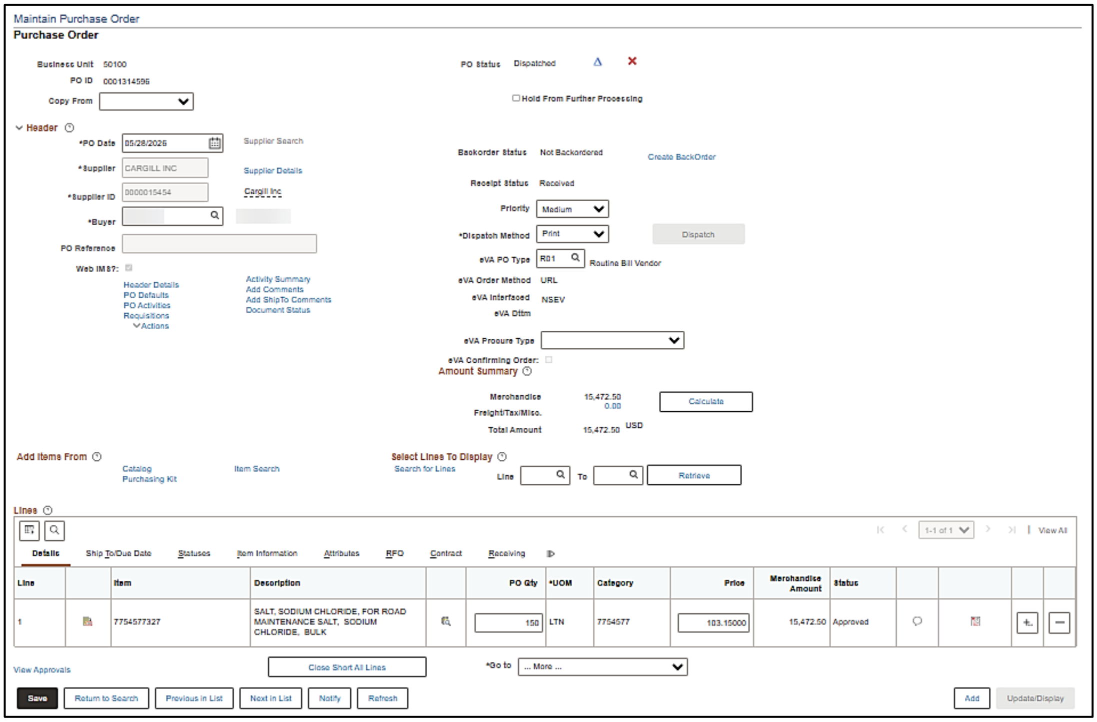
Revision History

Revision Date	Summary of Changes
9/1/2026	Baseline.

Creating a Change Order

Step	Action
1.	Navigate to the **Purchase Order** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Purchase Order > Add/Update POs** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchase Order** page using the following navigation path: **NavBar** > **Menu** > **Purchasing** > **Purchase Orders** > **Add/Update POs**

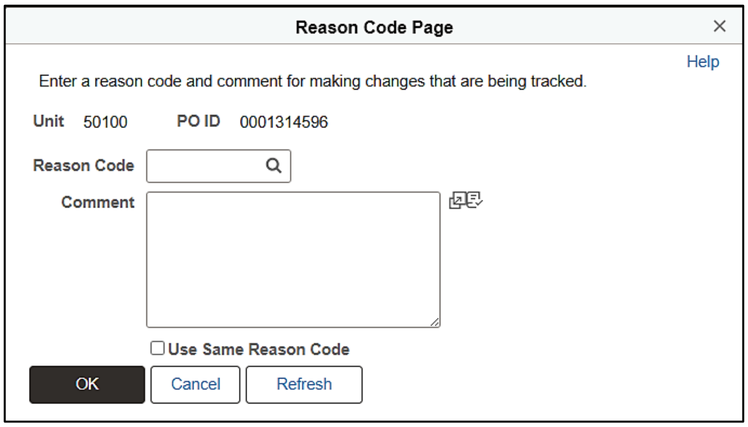
Step	Action
	The **Purchase Order Add a New Value** page displays. 
3.	Click the **Find an Existing Value** button. 
	The **Purchase Order Find an Existing Value Search** page displays. 
4.	Enter the applicable Purchase Order ID in the **PO ID** field. 

Step	Action
5.	Click the **Search** button. 
The **Maintain Purchase Order Purchase Order** page displays. 	
6.	Make changes to the purchase order following the Steps in one of the following sections of this Job Aid: • Adding a PO Line • Changing Quantity or Price • Changing Line Information • Changing Schedule Information • Canceling a PO Line • Canceling a Schedule Line • Changing PO Header Information
7.	Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.

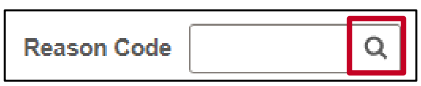
Saving and Dispatching a Change Order

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Maintain Purchase Order Purchase Order page, click the Save button.

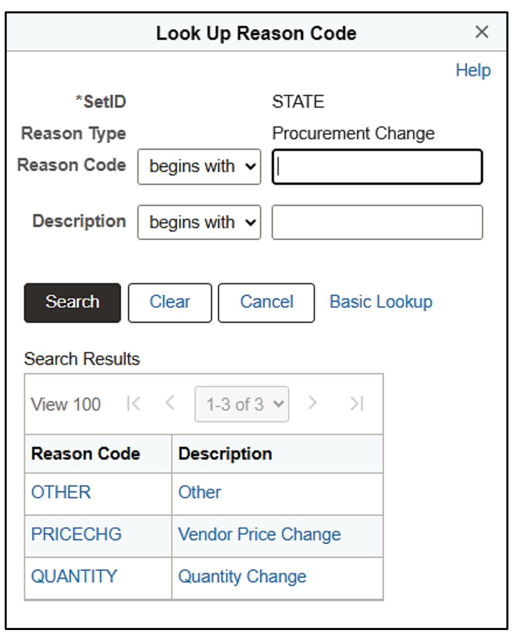
</td></tr>
<tr><td colspan="2">The Reason Code Page displays in a pop-up window.



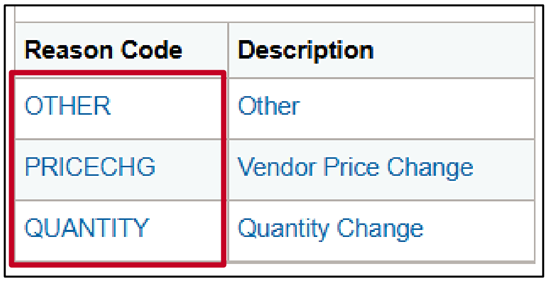
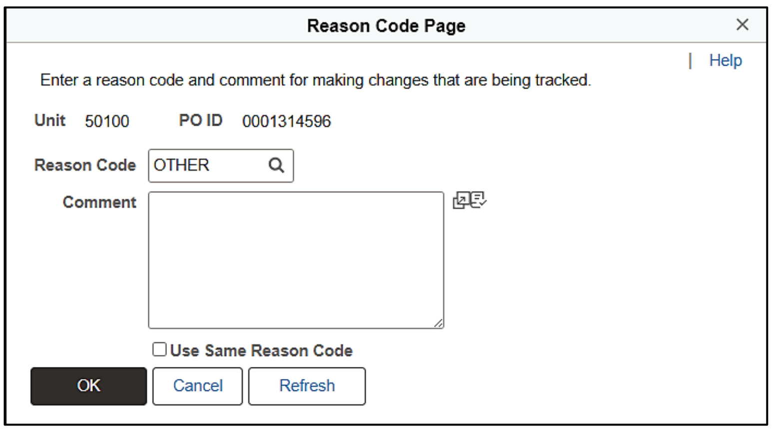
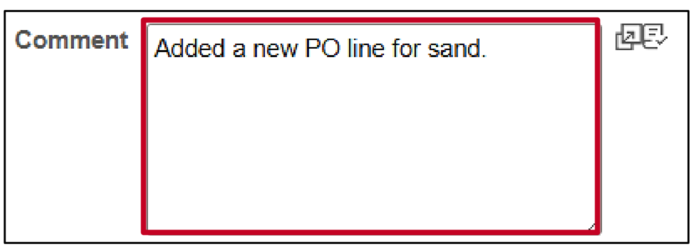
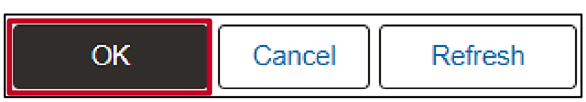
</td></tr>
<tr><td>2.</td><td>Click the Reason Code Look up icon.



</td></tr>
<tr><td colspan="2">The Look Up Reason Code page displays in a pop-up window.

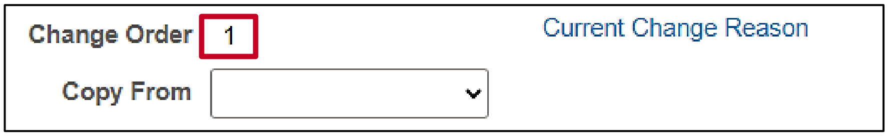


</td></tr>
</table>

Step	Action
3.	Click the applicable **Reason Code** link. 
The **Reason Code Page** displays.  	
4.	Enter an explanation for the change in the **Comment** field. 
5.	Click the **OK** button. 

Step	Action

Upon save, a **Change Order** number displays, fields are updated, and amounts are recalculated (based on what has been changed).



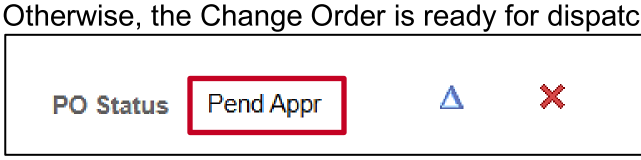
The following rules apply to Change Order Approvals:

- Adding a line to a PO will require Supervisor approval
- Changes < 25% do not need Supervisor approval
- Changes > 25% will escalate to the Supervisor for approval
- Changes > 25% or $50,000 (whichever is greater) to a PO with an original value > $50,000 will escalate to the ASD Director for Approval

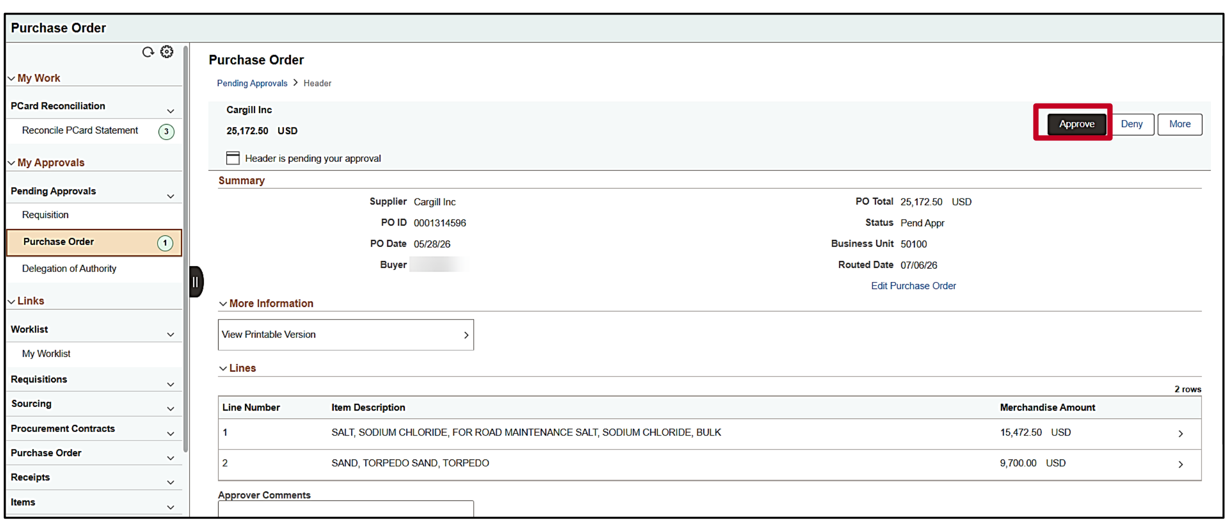
The Change Order appears in the approver's queue and an email is sent to the approver with a link to approve the change order. The approval process for change orders is the same as for POs.

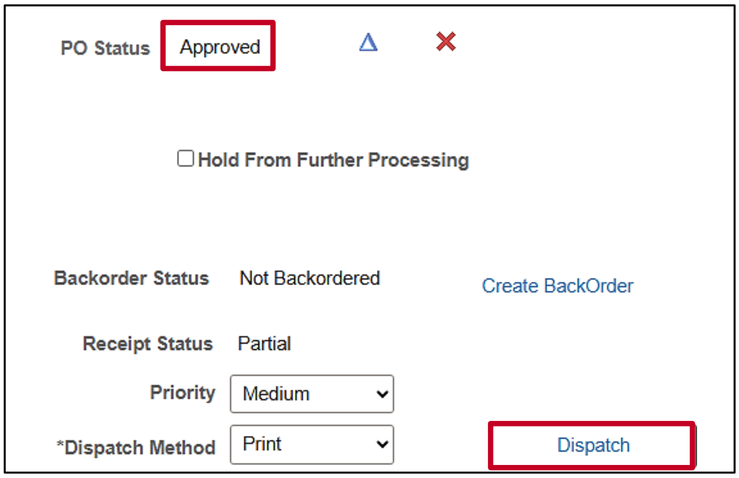
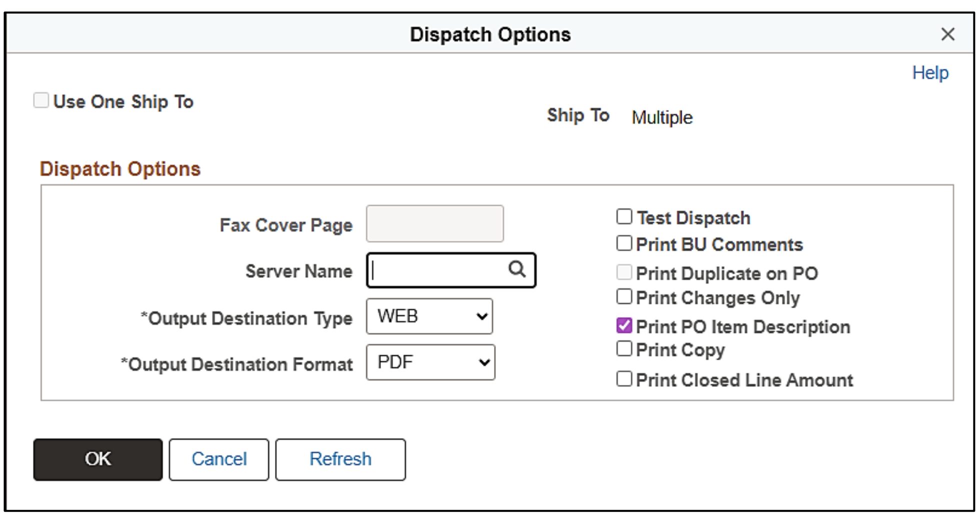
For information on Change Order approvals, see the Job Aid titled **PR343 Procurement Approvals** located on the Cardinal website in **Job Aids** under **Learning**.

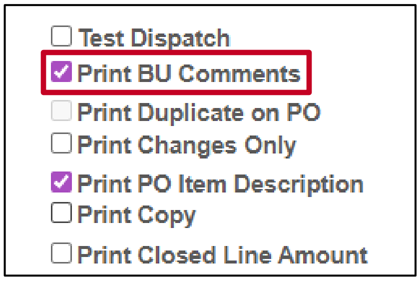
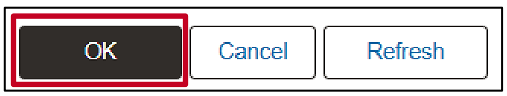
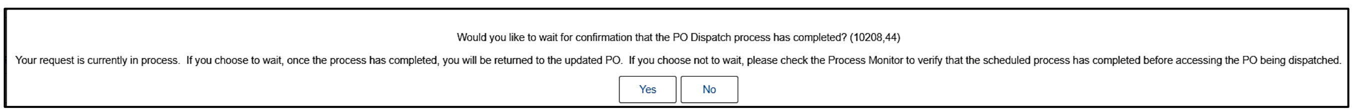
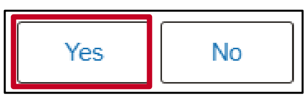
In cases where the Change Order needs approval, its status changes to "Pend Appr". Otherwise, the Change Order is ready for dispatch.



In the example below, a line was added, and the PO was sent for approval. This is the **Purchase Order Approval** page for this Change Order.

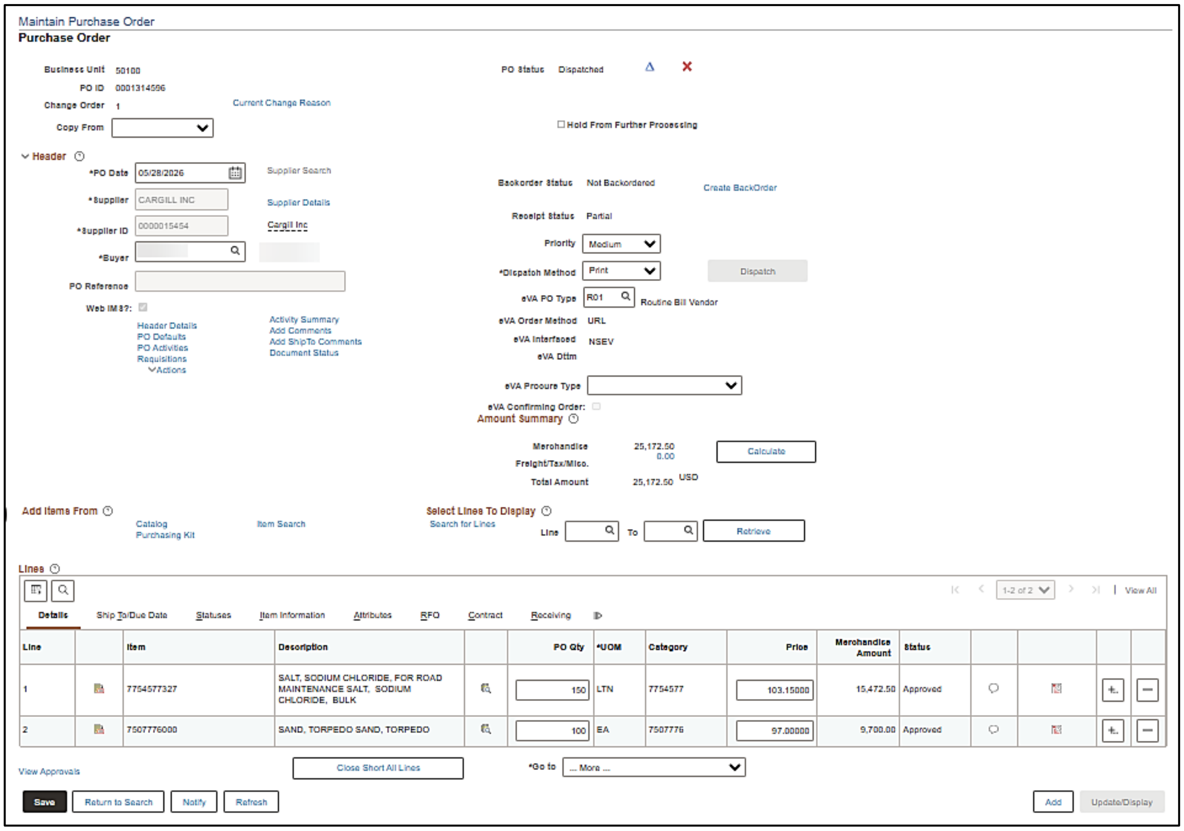


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">Once the PO Status is “Approved”, the Dispatch button is enabled.
</td></tr>
<tr><td>6.</td><td>Note that the Dispatch Method field defaults to "Print".
</td></tr>
<tr><td>7.</td><td>Click the Dispatch button.
</td></tr>
<tr><td colspan="2">The Dispatch Options page displays in a pop-up window.
</td></tr>
</table>

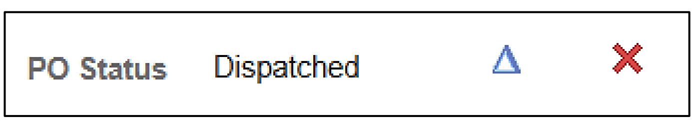
Step	Action
8.	Select the **Print BU Comments** checkbox option to display Line and Header comments, including eVA terms and conditions. 
9.	Click the **OK** button. 
A pop-up message regarding waiting for confirmation displays. 	
10.	Click the **Yes** button. 

Step	Action

Once the PO Dispatch process has completed, the **Maintain Purchase Order Purchase Order** page displays.

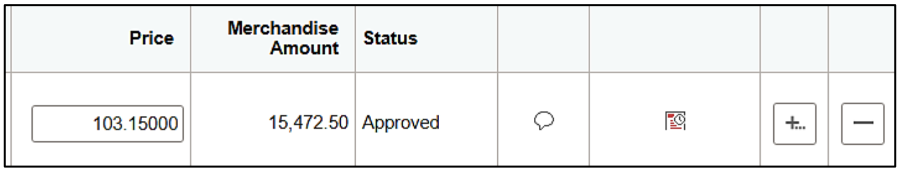
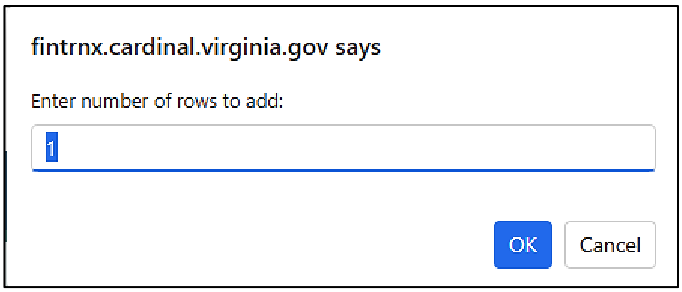
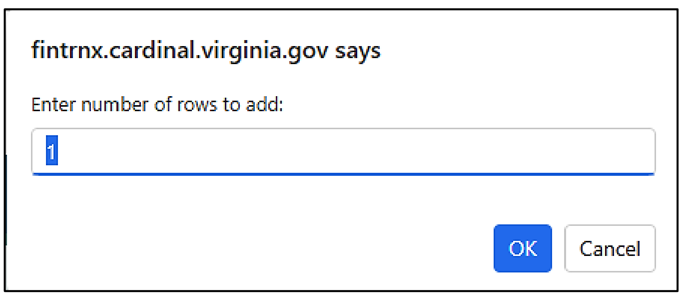


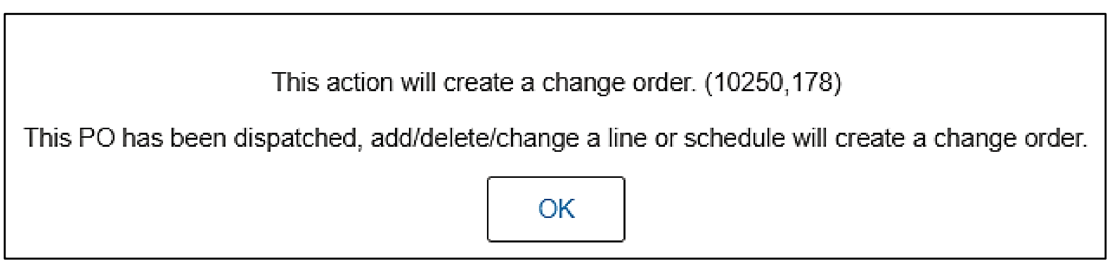
The **PO Status** field updates to "Dispatched".

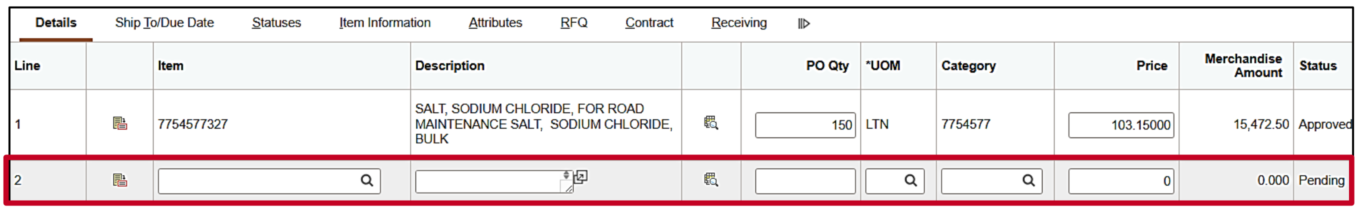
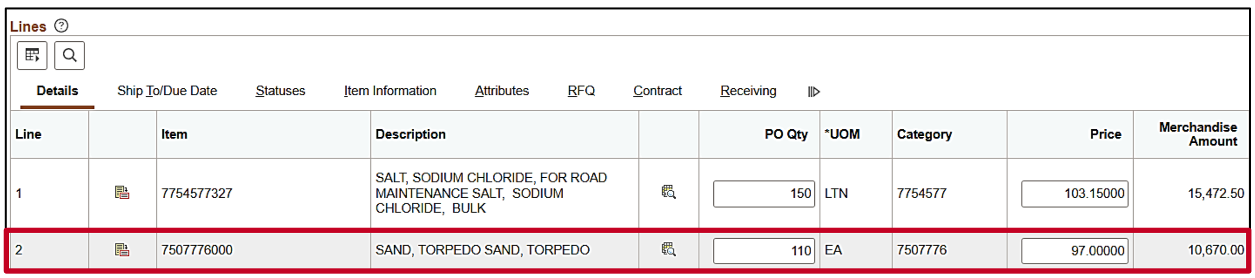


A dispatched PO flows to eVA for reporting purposes. If the supplier is set up in eVA as URL dispatch, the PO is sent electronically to the supplier. If not, the Buyer should print the PO and send it to the supplier.

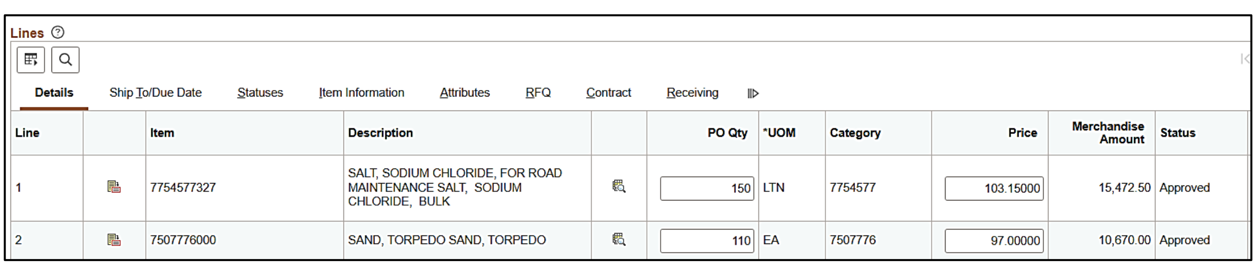
Adding a PO Line

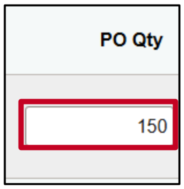
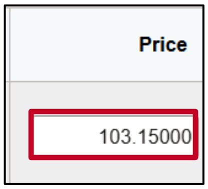
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Add Multiple Rows icon (+...) to the right of a line in the Lines section.

</td></tr>
<tr><td colspan="2">The Enter number of rows to add pop-up window displays.

</td></tr>
<tr><td>2.</td><td>The number of rows to add defaults to 1. If more than one line is needed, update the number.

</td></tr>
<tr><td>3.</td><td>Click the OK button.

</td></tr>
<tr><td colspan="2">A message displays in a pop-up window, explaining that a Change Order will be created.

</td></tr>
</table>

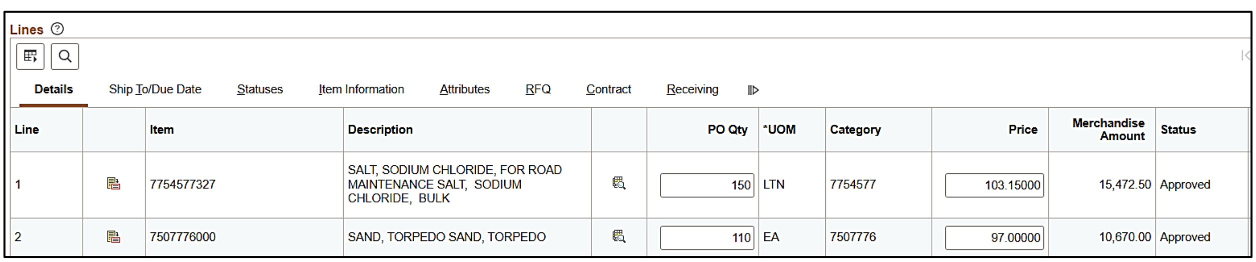
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>Click the OK button.
</td></tr>
<tr><td colspan="2">A new line displays in the Lines section.
</td></tr>
<tr><td>5.</td><td>Complete the new line information as appropriate.

For more information on entering a Purchase Order line, see the Job Aid titled PR344 Creating Purchase Orders (VDOT Only) located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>6.</td><td>Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.</td></tr>
</table>

Changing Quantity or Price

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Maintain Purchase Order Purchase Order page, navigate to the Lines section.
</td></tr>
</table>

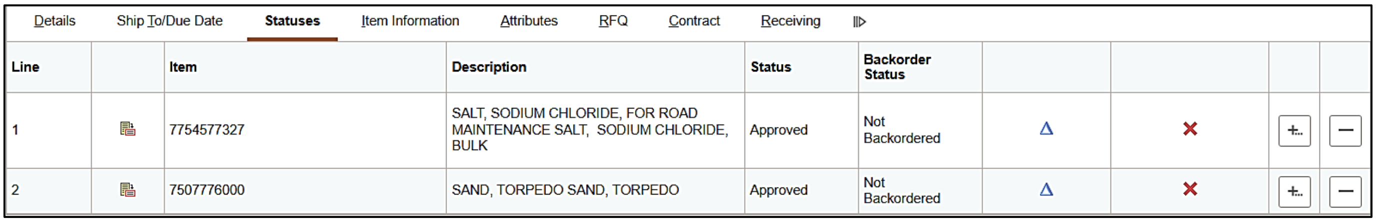
Step	Action
2.	Update the **PO Qty** field as applicable. 
3.	Update the **Price** field as applicable. 
ℹ	Never change the unit price on an item that has already been received and vouchered. Close out the line amount to what has been matched and insert a new line for the remaining items at a changed price.
4.	Save and Dispatch the change order by following the steps in the [Saving and Dispatching a Change Order] section of this Job Aid.

Changing Line Information

Step	Action
1.	On the **Maintain Purchase Order Purchase Order** page, navigate to the **Lines** section. 
2.	Click the **Statuses** tab. 

Step	Action

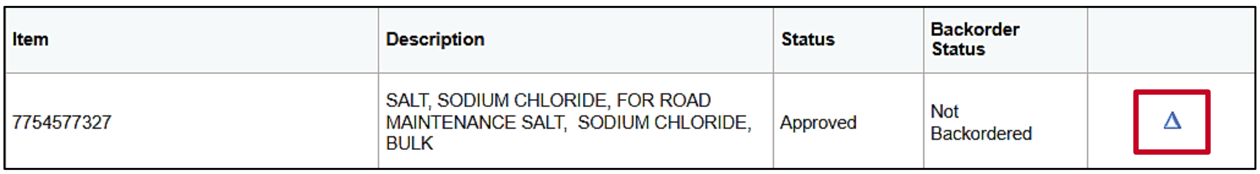
The **Statuses** tab displays.



Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

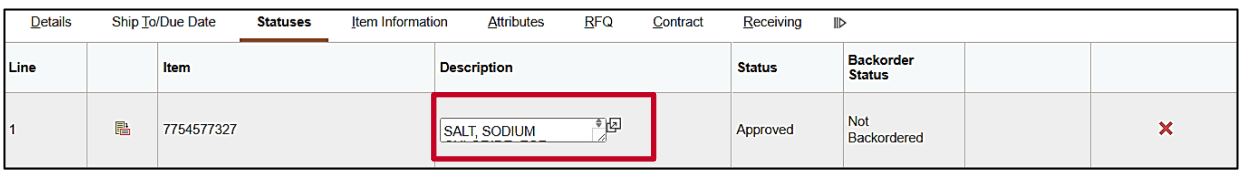
Line		Item	Description	Status	Backorder Status
1		7754577327	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	Approved	Not Backordered
2		7507776000	SAND, TORPEDO SAND, TORPEDO	Approved	Not Backordered

3. Click the **Change Line** icon on the Line to be changed.



Item	Description	Status	Backorder Status
7754577327	SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK	Approved	Not Backordered

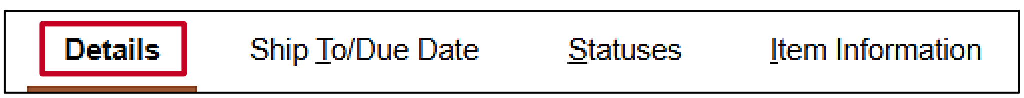
4. Edit open fields on the **Statuses** tab as appropriate.



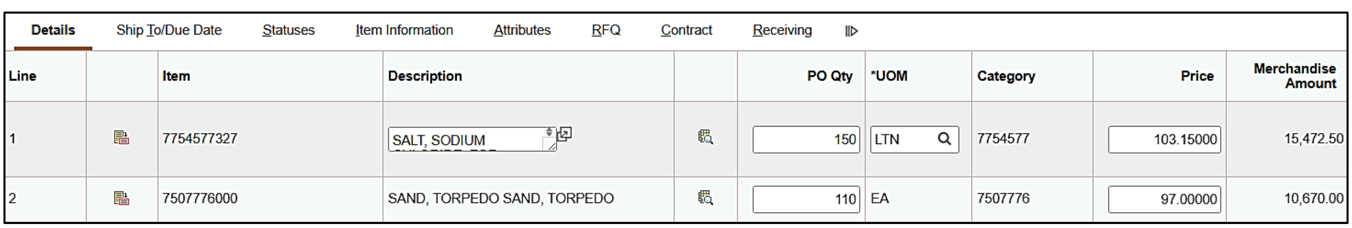
Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line		Item	Description	Status	Backorder Status
1		7754577327	SALT, SODIUM	Approved	Not Backordered

5. Click the **Details** tab.



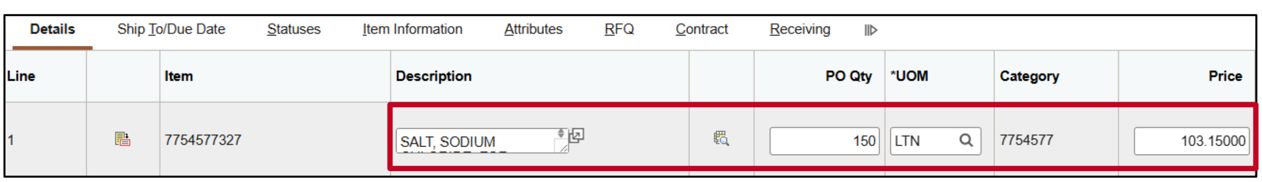
The **Details** tab displays.



Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line		Item	Description		PO Qty	*UOM	Category	Price	Merchandise Amount
1		7754577327	SALT, SODIUM		150	LTN	7754577	103.15000	15,472.50
2		7507776000	SAND, TORPEDO SAND, TORPEDO		110	EA	7507776	97.00000	10,670.00

6. Edit open fields on the **Details** tab as appropriate.

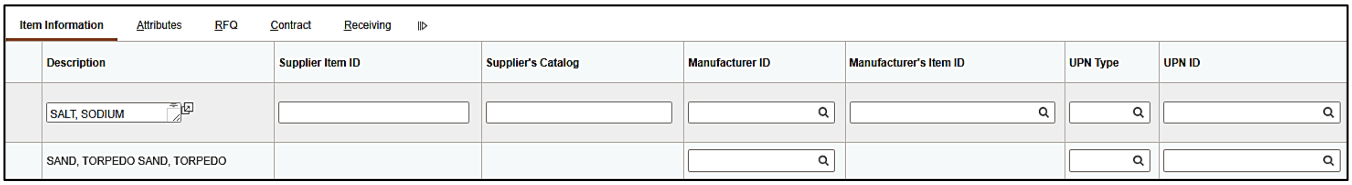


Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

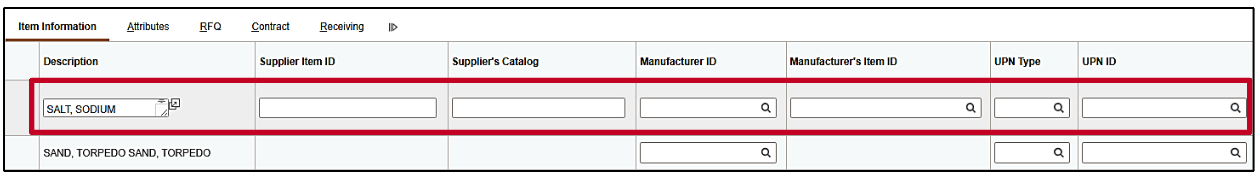
Line		Item	Description		PO Qty	*UOM	Category	Price
1		7754577327	SALT, SODIUM		150	LTN	7754577	103.15000

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the Item Information tab.

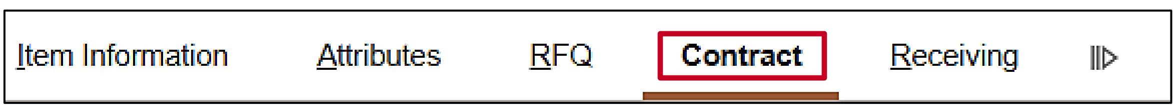
</td></tr>
<tr><td colspan="2">The Item Information tab displays.



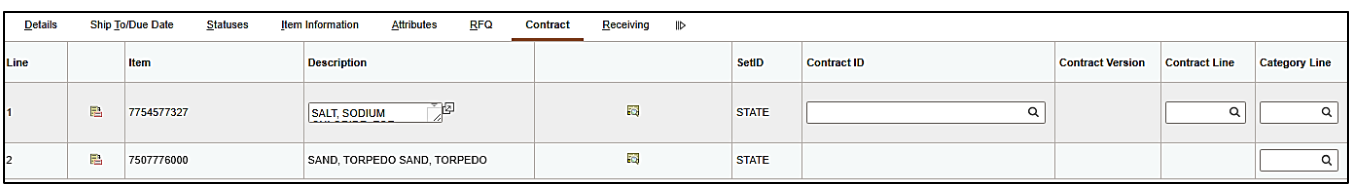
</td></tr>
<tr><td>8.</td><td>Edit open fields on the Item Information tab as appropriate.



</td></tr>
<tr><td>9.</td><td>Click the Contract tab.



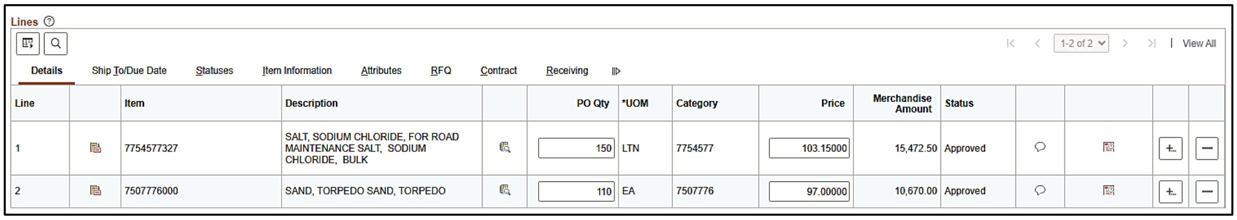
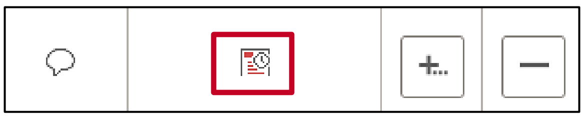
</td></tr>
<tr><td colspan="2">The Contract tab displays.



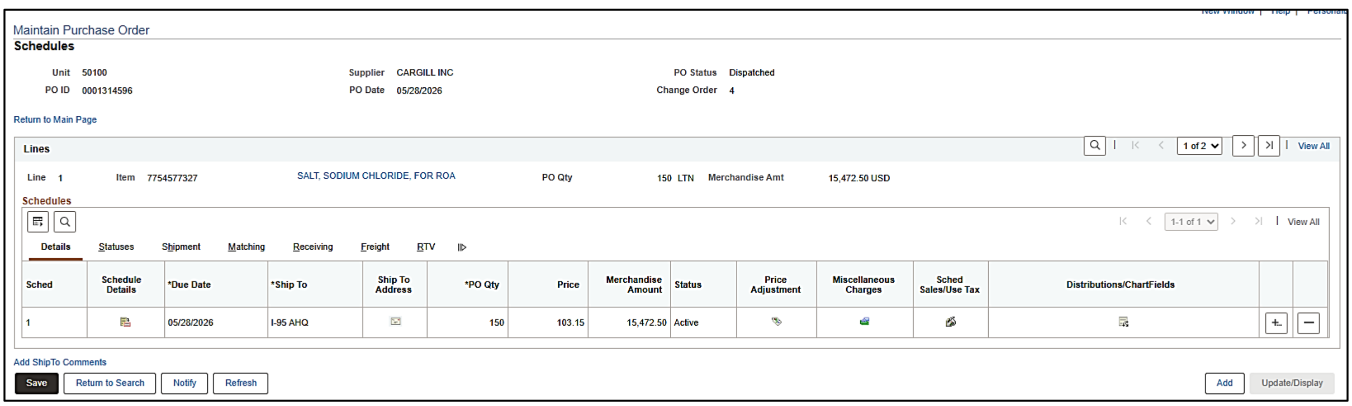
</td></tr>
<tr><td>10.</td><td>Edit open fields on the Contract tab as appropriate.

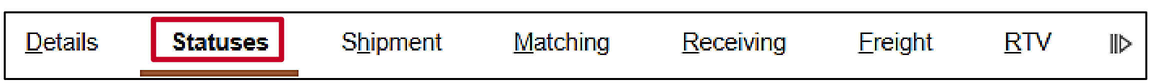
</td></tr>
<tr><td>11.</td><td>Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.</td></tr>
</table>

Changing Schedule Information

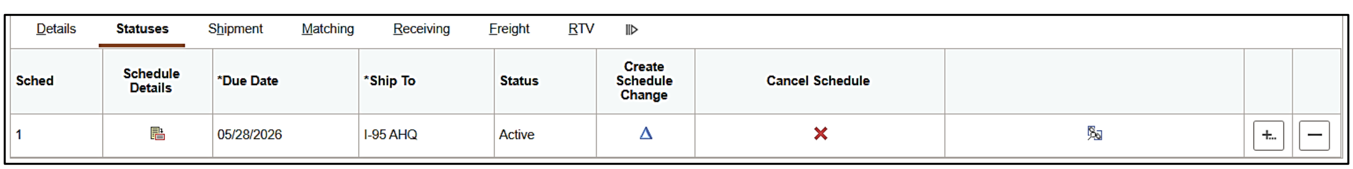
Step	Action
1.	On the **Maintain Purchase Order Purchase Order** page, navigate to the **Lines** section. 
2.	Click the **Schedule** icon on the applicable line. 

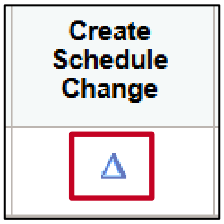
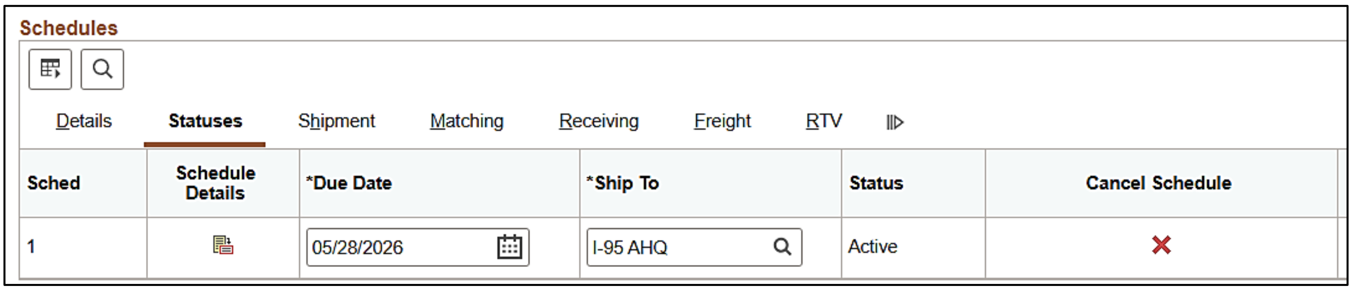
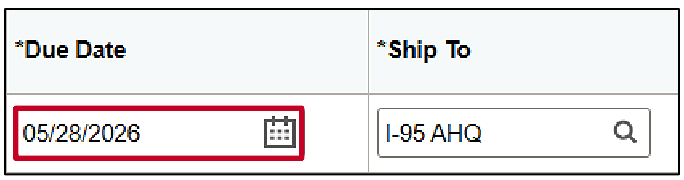
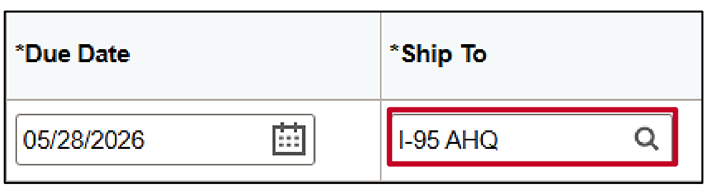
The **Maintain Purchase Order Schedules** page displays.



Step	Action
3.	Click the **Statuses** tab. 

The **Statuses** tab displays.



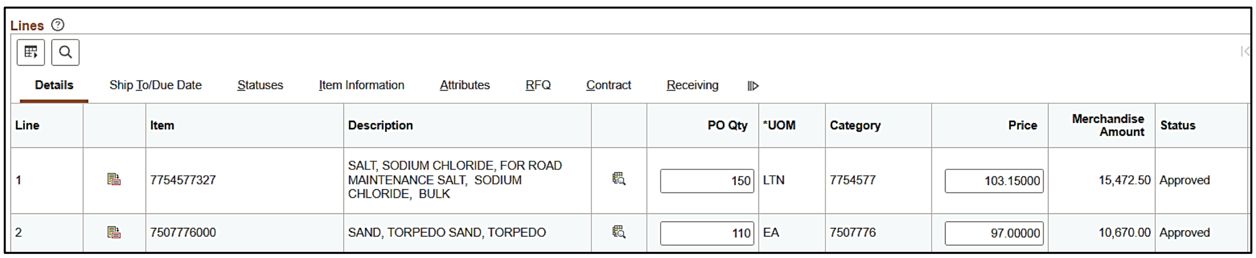
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>Click the Create Schedule Change icon.

</td></tr>
<tr><td colspan="2">The Due Date and Ship To fields are open for editing.

</td></tr>
<tr><td>5.</td><td>Edit the Due Date field as applicable.

</td></tr>
<tr><td>6.</td><td>Edit the Ship To field as applicable.

</td></tr>
<tr><td>7.</td><td>Save and Dispatch the change order by following the steps in the <u>Saving and Dispatching a Change Order</u> section of this Job Aid.</td></tr>
</table>

Canceling a PO Line

Canceling the PO Line is available if the PO status is "Dispatched". If a dispatched line is canceled, a Change Order is created. Canceling is also available when the PO status is "Approved", but only if the PO was previously dispatched and subsequently changed and approved.

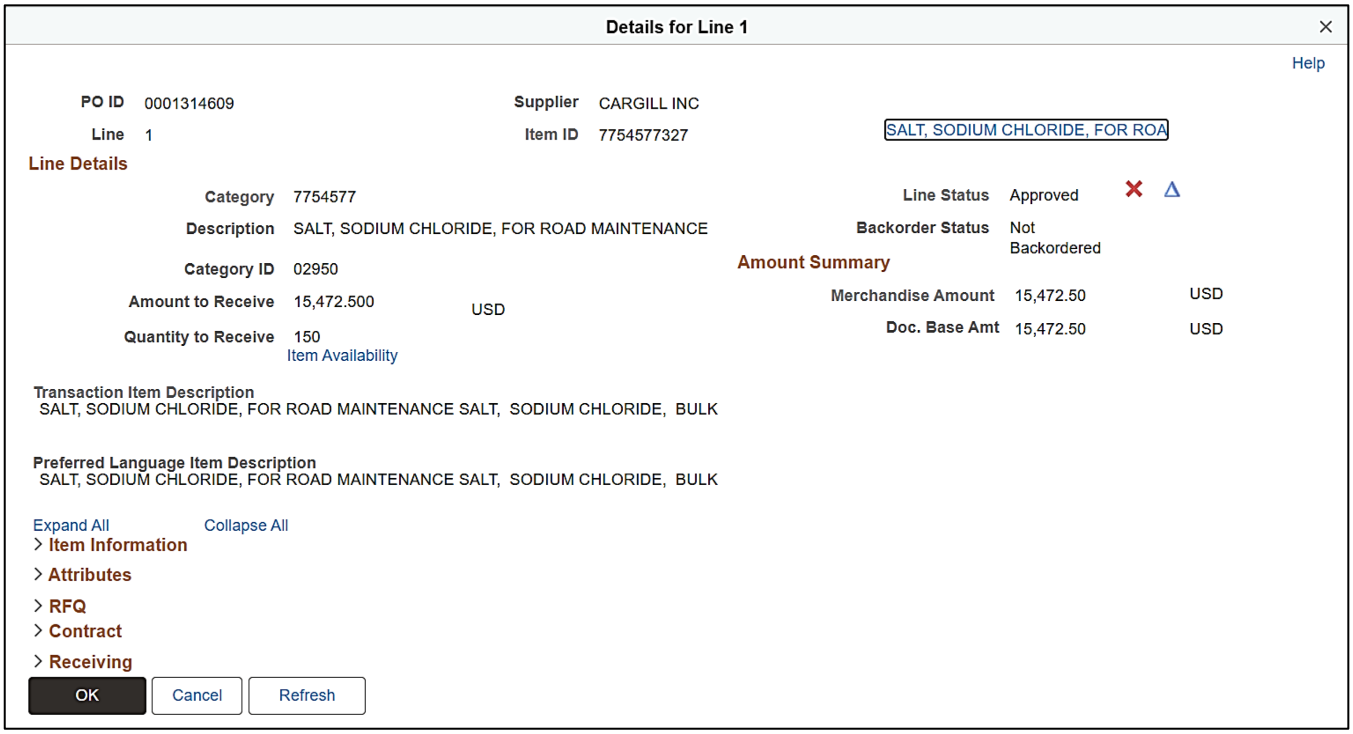
In order to cancel a PO Line:

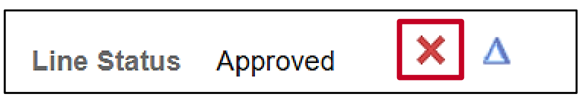
- There cannot be any matched PO Line schedules
- There cannot be any Receipts against the PO Line
- There cannot be any open Vouchers against the PO Line

Step	Action
1.	On the **Maintain Purchase Order Purchase Order** page, navigate to the **Lines** section. 
2.	Click the **Line Details** icon on the applicable line. 

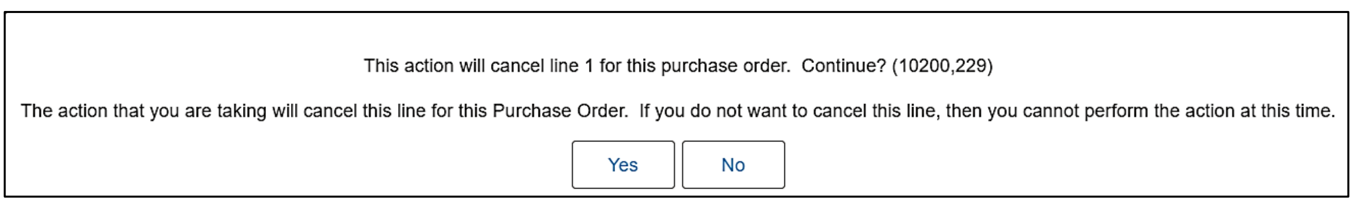
Step	Action

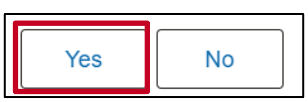
The **Details for Line XX** page displays in a pop-up window.

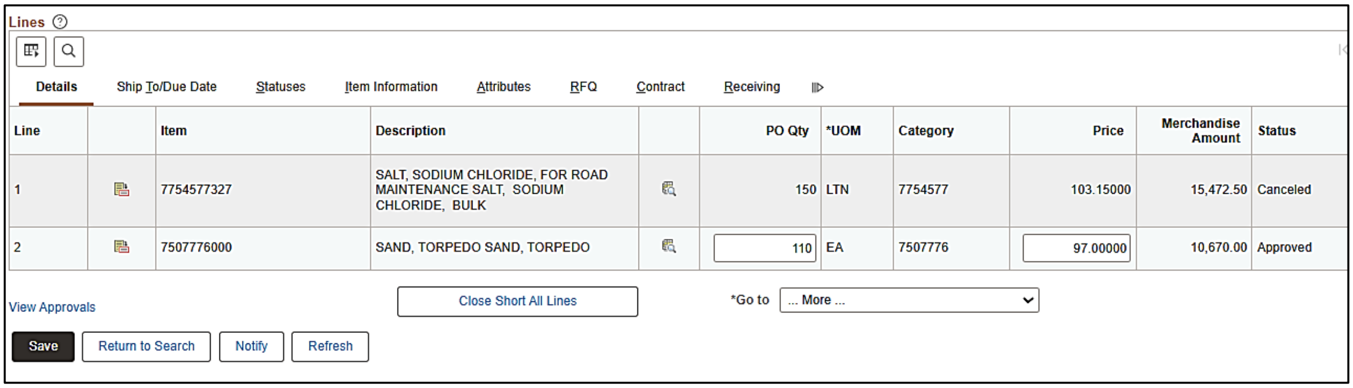
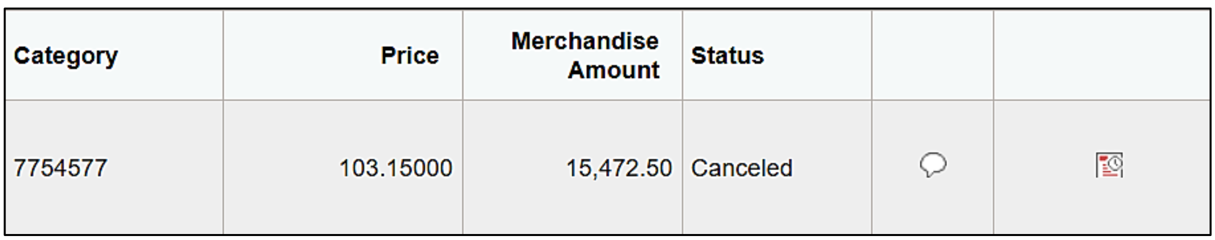


	Click the **Cancel Line** icon. 

A message displays, explaining that this action will cancel the line.

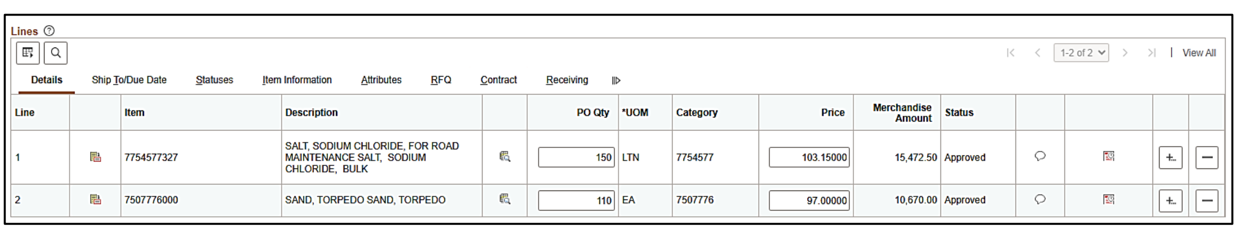


3.	Click the **Yes** button. 

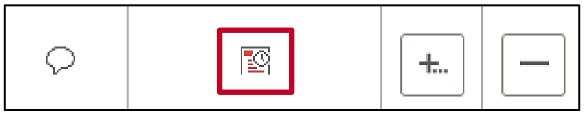
Step	Action
	The **Maintain Purchase Order Purchase Order** page redisplays.  The **Status** of the line is now set to “Canceled”. 
4.	Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.

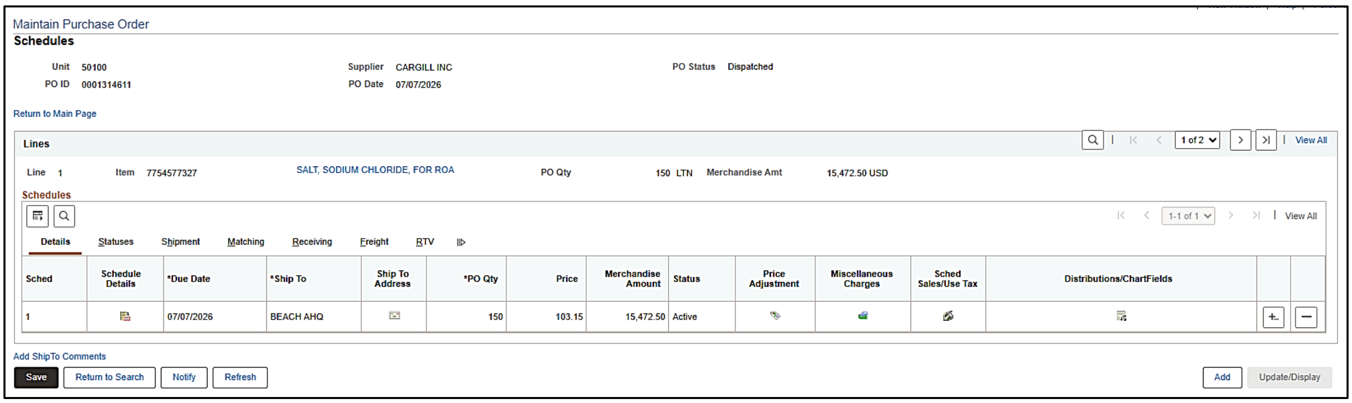
Canceling a Schedule Line

Canceling the PO Schedule is available if the PO status is “Dispatched”. If a dispatched schedule is canceled, a change order is created. Canceling is also available when the PO status is “Approved”, but only if the PO was previously dispatched and subsequently changed and approved.

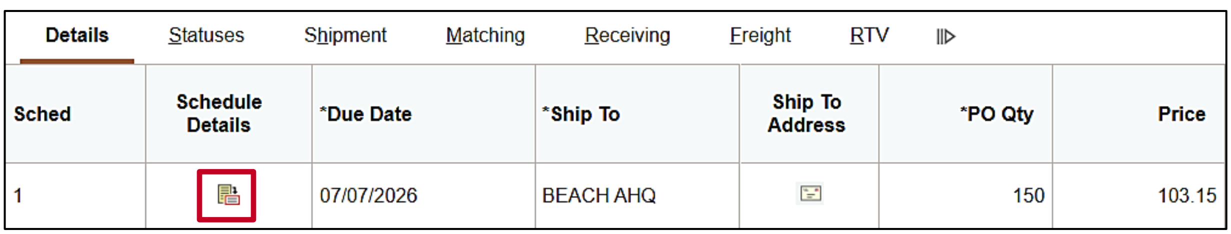
Step	Action
1.	On the **Maintain Purchase Order Purchase Order** page, navigate to the **Lines** section. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>Click the Schedule icon on the applicable line.


</td></tr>
<tr><td colspan="2">The Maintain Purchase Order Schedules page displays.

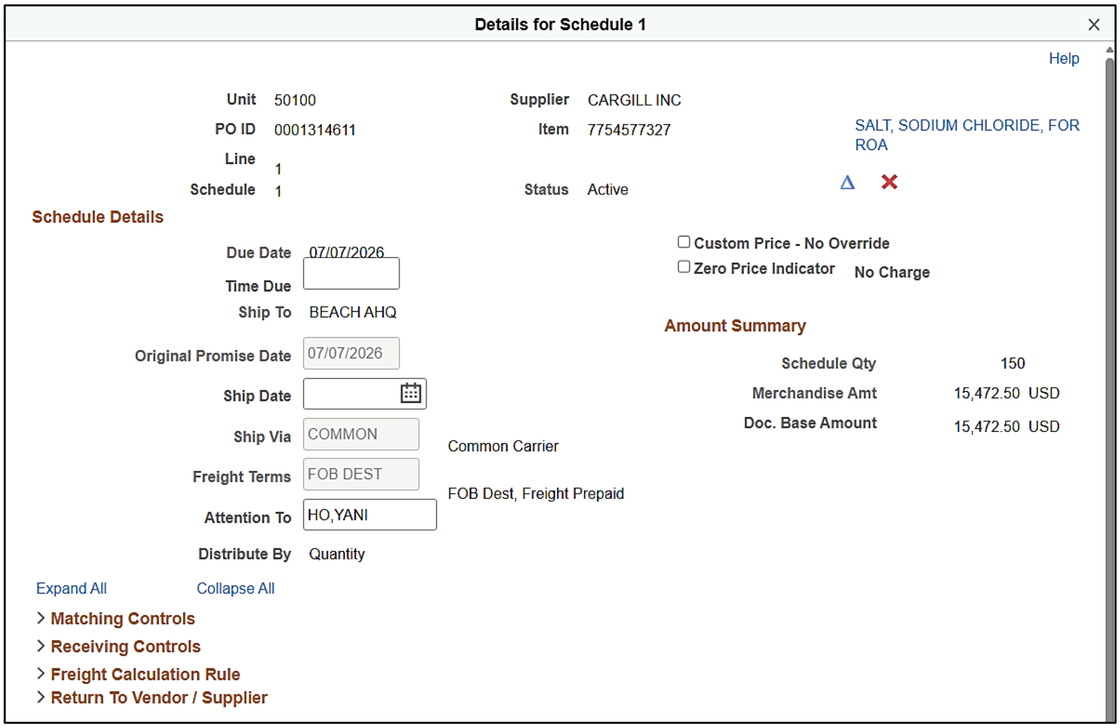


</td></tr>
<tr><td>3.</td><td>Click the Schedule Details icon.

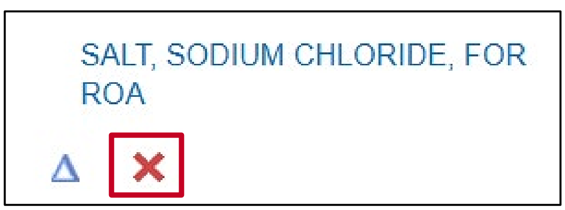


</td></tr>
</table>

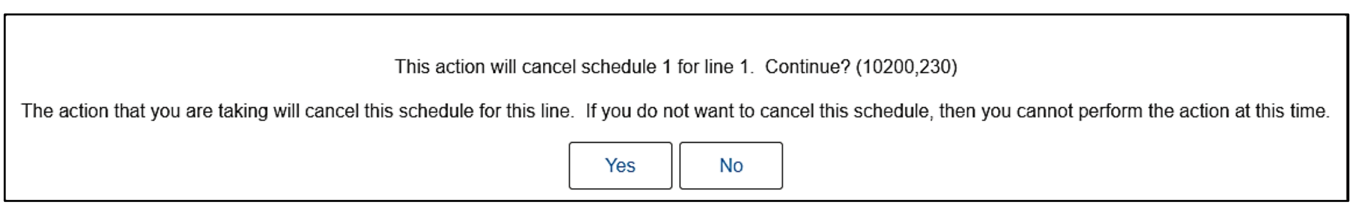
Step	Action
	The **Details for Schedule 1** page displays in a pop-up window.



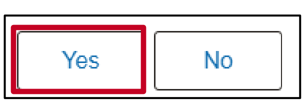
Step	Action
4.	Click the **Cancel Schedule** icon.

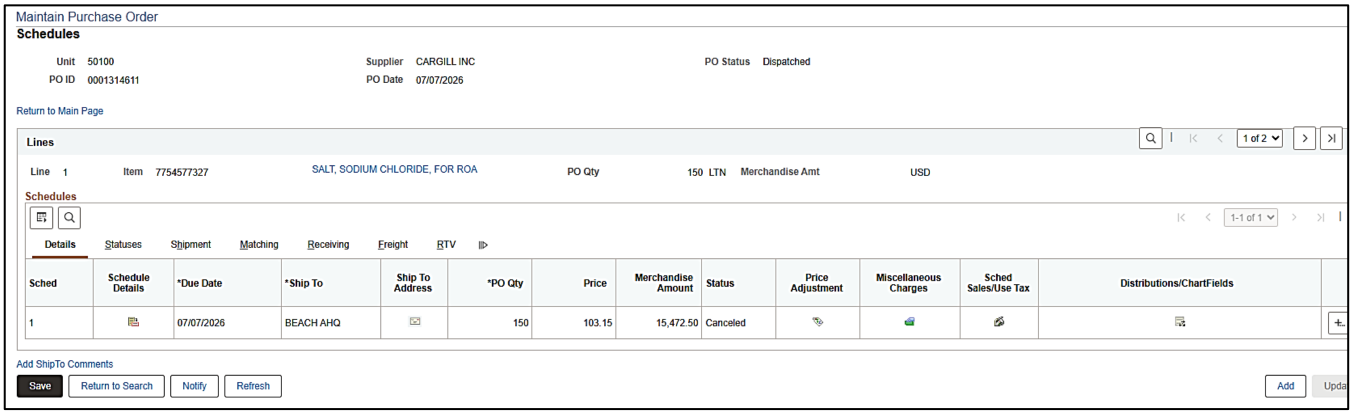
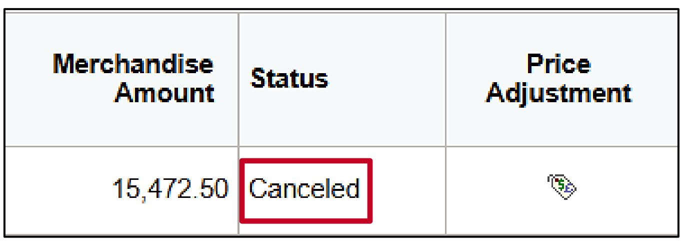
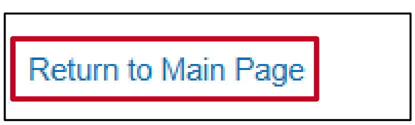


Step	Action
	A message displays, confirming that this schedule is being canceled.

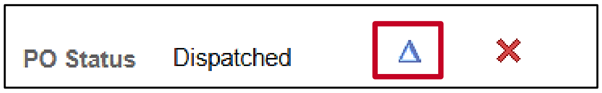
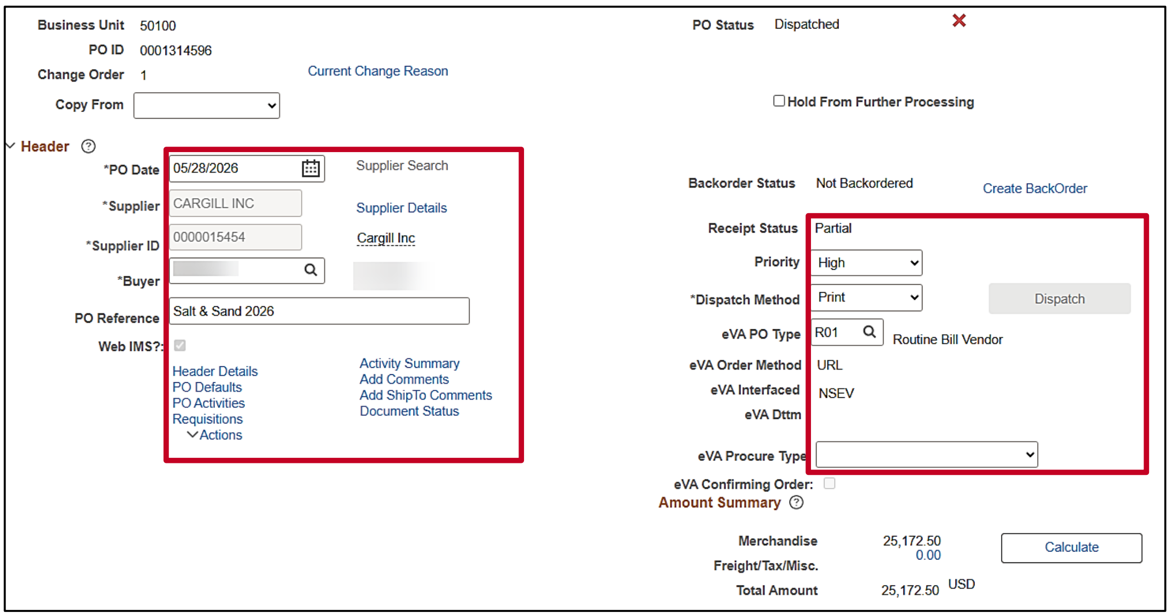


Step	Action
5.	Click the **Yes** button.



Step	Action
	The **Maintain Purchase Order Schedules** page redisplays.  The **Status** field is set to “Canceled”. 
6.	Add a new Schedule line.
	An active Line must have an active Schedule.
7.	Click the **Return to Main Page** link. 
8.	Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.

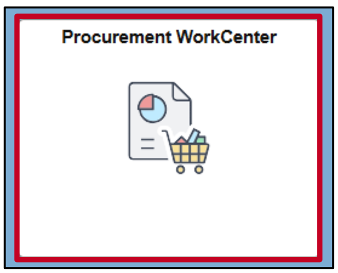
Changing PO Header Information

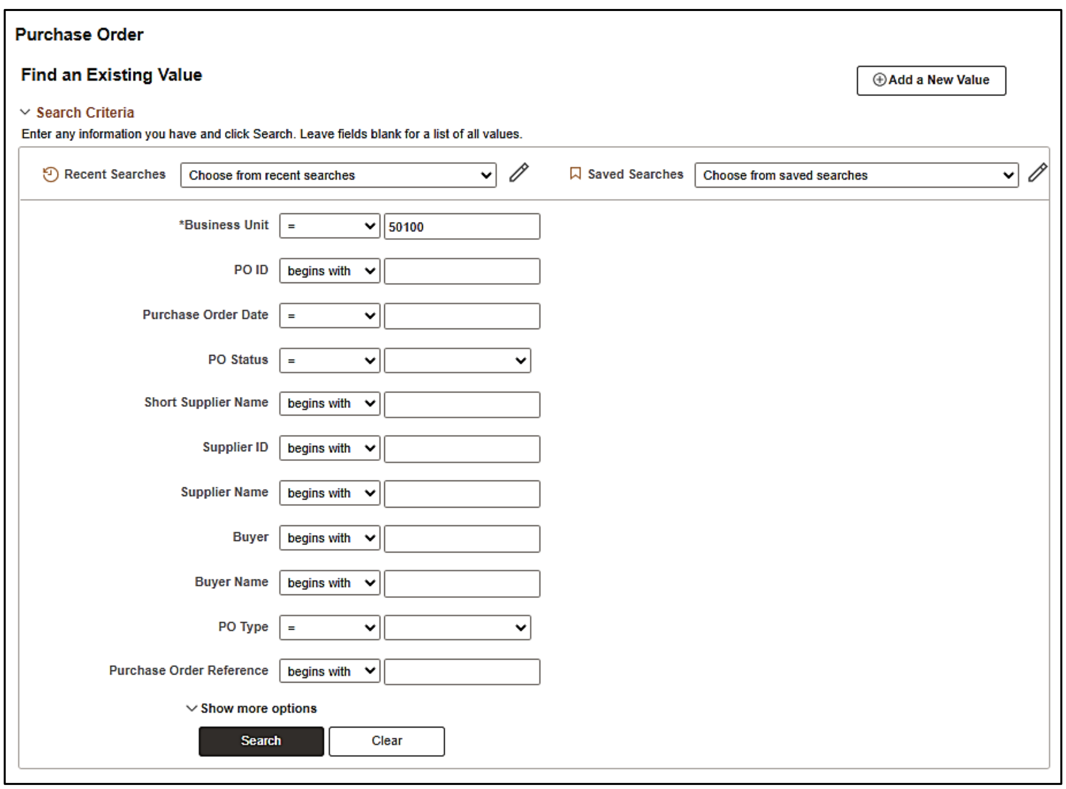
Step	Action
1.	On the **Maintain Purchase Order Purchase Order** page, click the **Change Order** icon. 
2.	Make changes to the **PO Header** information as applicable. 
ℹ	The following will automatically cancel an eVA order and create a new eVA order: • Change to the Bill To Address • Change to a different address location for the same supplier
ℹ	Changing header information does not generally trigger the change order approval process.
3.	Save and Dispatch the change order by following the steps in the Saving and Dispatching a Change Order section of this Job Aid.

Modifying a Purchase Order's Accounting Distribution

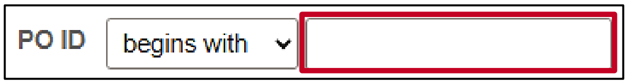
There are instances when a Purchase Order has been partially received and invoiced and, due to fiscal changes in budgets or project coding, it is necessary to change the accounting distribution for the un-invoiced balance. For more information, see the Job Aid titled **PR344 Update ChartFields on Partially Vouchered Purchase Orders (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

Changing accounting distributions does not trigger the change order approval process.

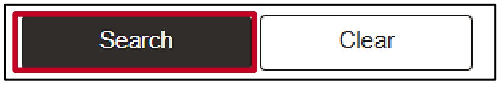
Step	Action
1.	Navigate to the **Purchase Order** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Purchase Order > Add/Update POs** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchase Order** page using the following navigation path: **NavBar** > **Menu** > **Purchasing** > **Purchase Orders** > **Add/Update POs**

Step	Action
	The **Purchase Order Add a New Value** page displays. 
3.	Click the **Find an Existing Value** button. 
	The **Purchase Order Find an Existing Value Search** page displays. 

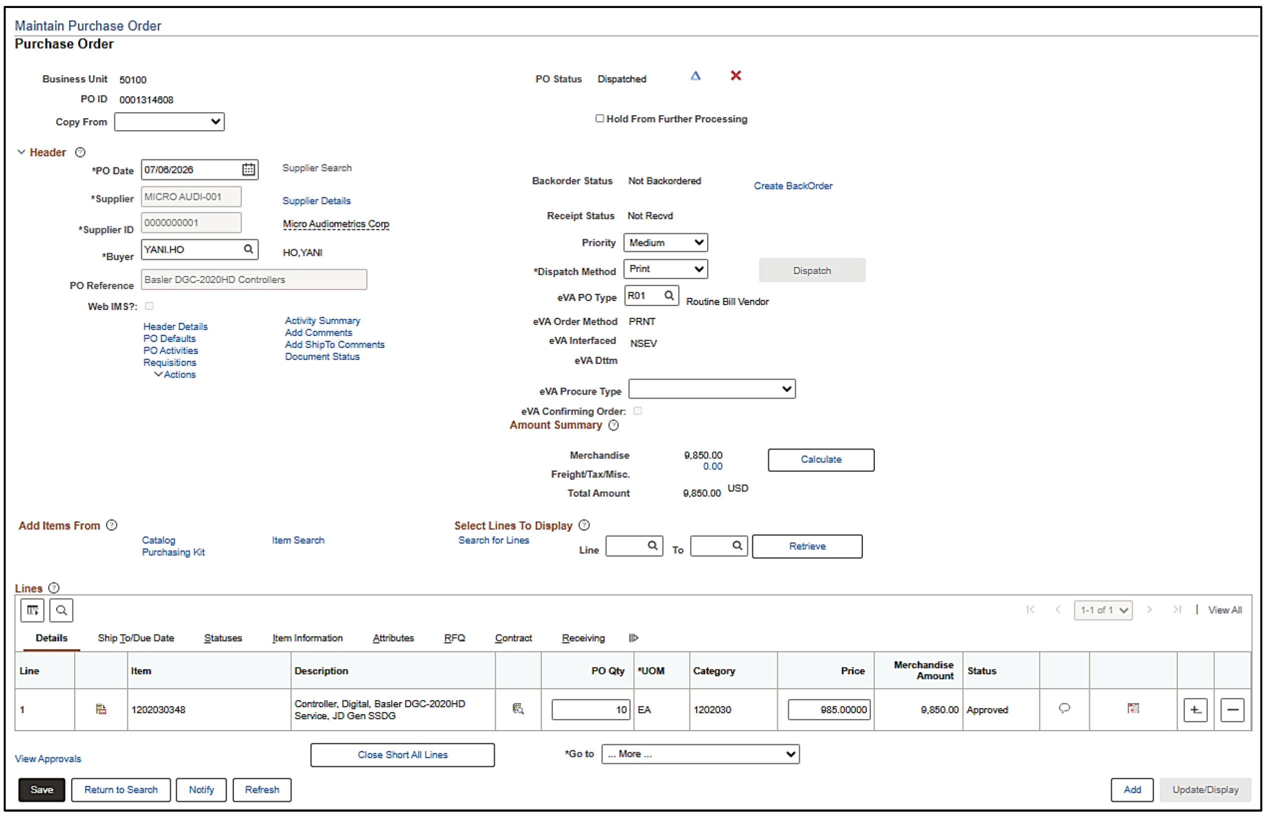
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4.</td><td>Enter the applicable Purchase Order ID in the PO ID field.



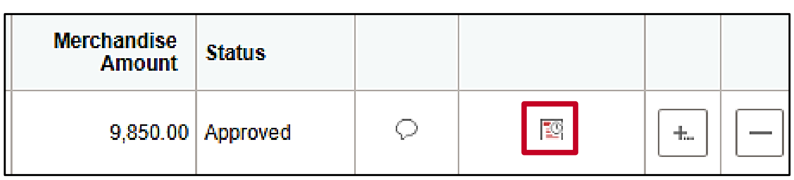
</td></tr>
<tr><td>5.</td><td>Click the Search button.



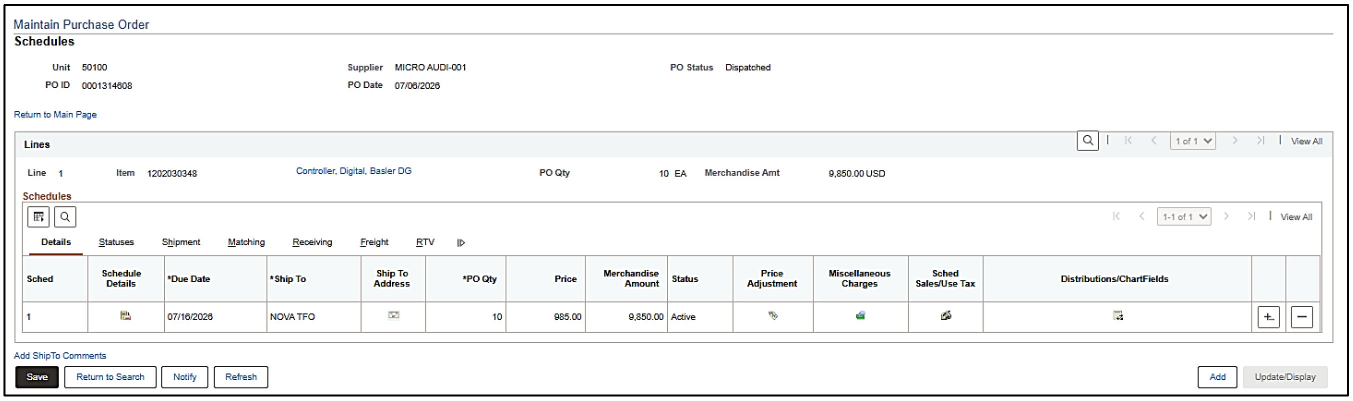
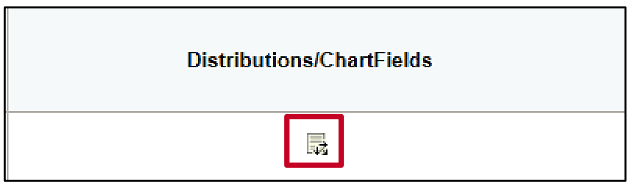
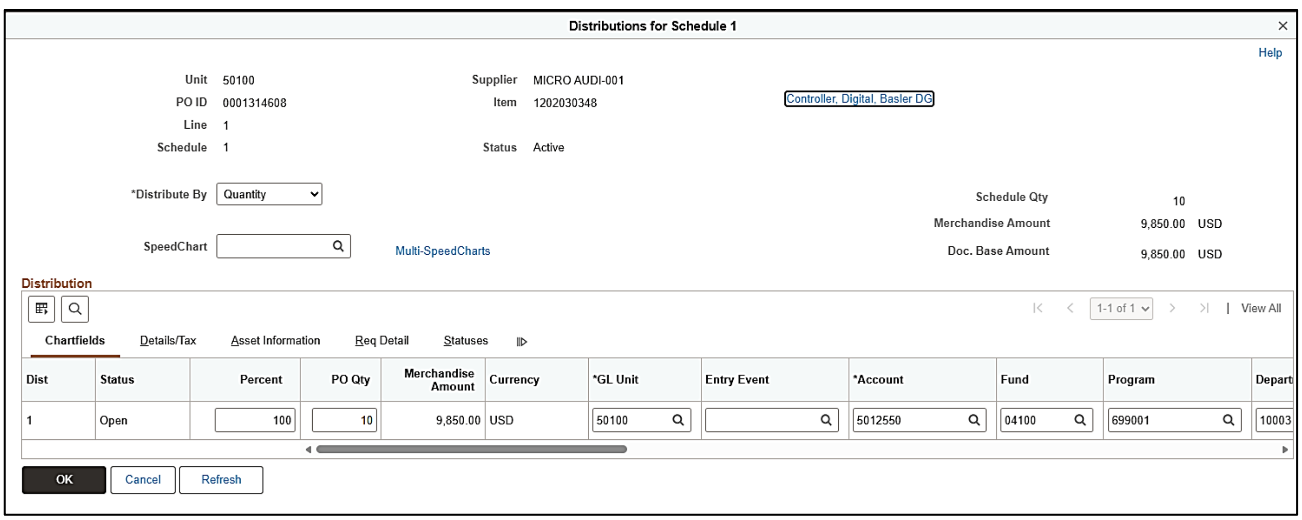
</td></tr>
<tr><td colspan="2">The Maintain Purchase Order Purchase Order page displays.

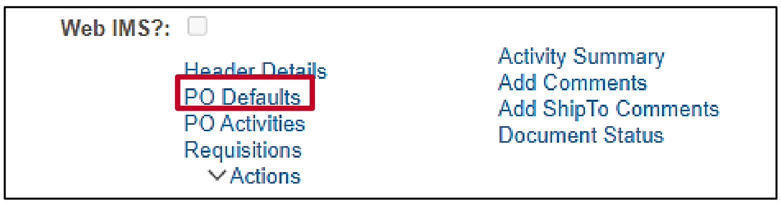
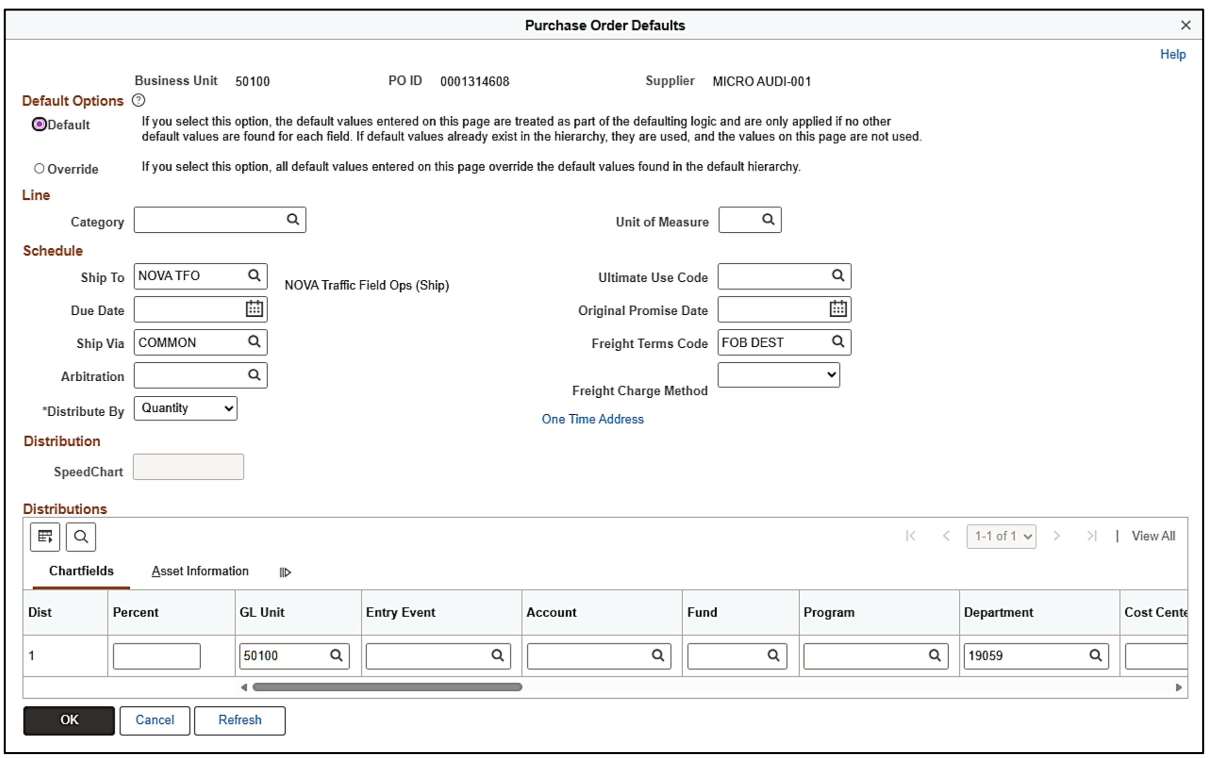


</td></tr>
<tr><td>6.</td><td>Click the Schedule icon on the Details tab in the Lines section.



</td></tr>
</table>

Step	Action
	The **Maintain Purchase Order Schedules** page displays. 
7.	Click the **Distributions/ChartFields** icon. 
	The **Distributions for Schedule 1** page displays in a pop-up window. 
8.	Enter the new ChartField values. 

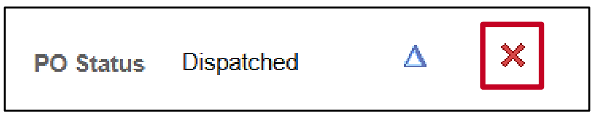
Step	Action
9.	Click the **OK** button. 
	For more detailed information about combination edits, see the job aid titled **GL332 Combination Edits Review Tools (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.
	Click the **PO Defaults** link on the **Maintain Purchase Order Purchase Order** page to access default accounting distribution lines for the Purchase Order.  New values entered on this page will override default values. Only fields with new values will be updated. 

Canceling a Purchase Order

In order to cancel a Purchase Order:

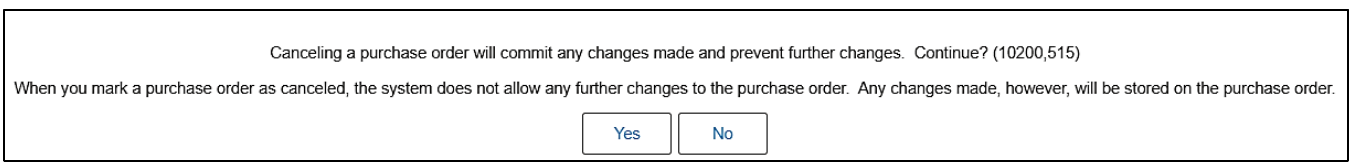
- The Purchase Order cannot be on hold
- There cannot be any matched Purchase Order line schedules
- There cannot be any Receipts against the Purchase Order
- There cannot be any open Vouchers against the Purchase Order

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Look up the applicable Purchase Order by following Steps 1-5 in the Modifying a Purchase Order’s Accounting Distribution section of this Job Aid.</td></tr>
<tr><td>2.</td><td>On the Maintain Purchase Order Purchase Order page, click the Cancel icon in the Header section.

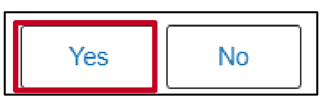


</td></tr>
<tr><td colspan="2">This begins the cancelation process, which includes changing the lines to a “Cancel” status and changing the header to a “Pending Cancel” status.

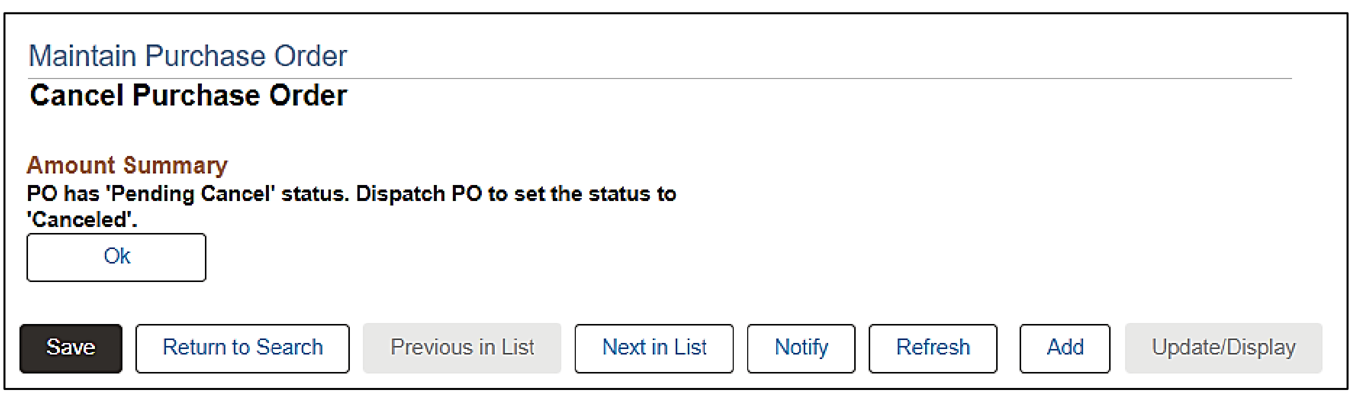
A message displays, explaining that canceling the PO will prevent further changes to the PO.



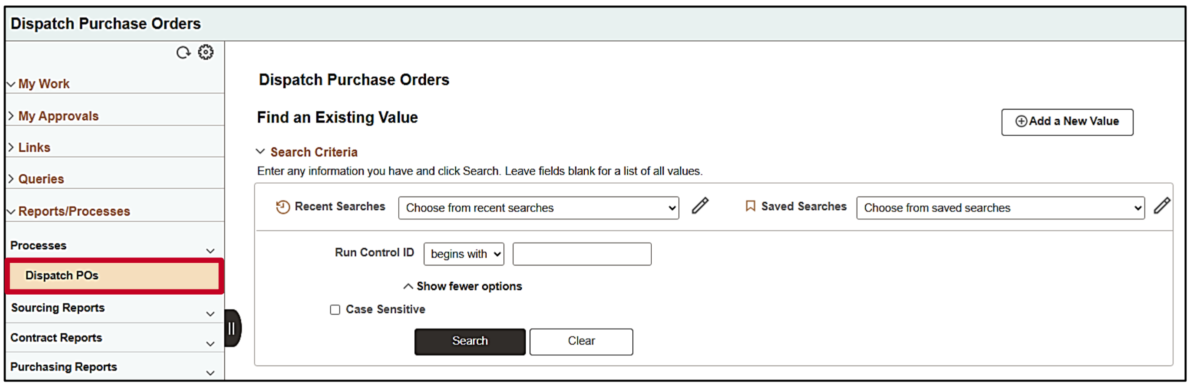
</td></tr>
<tr><td>3.</td><td>Click the Yes button.



</td></tr>
<tr><td colspan="2">The Maintain Purchase Order Cancel Purchase Order page displays.



</td></tr>
</table>

Step	Action
4.	Click the **OK** button. 
	Once canceled, the Buyer or a batch process will dispatch the PO to complete the cancelation process. This step is required to officially cancel the PO. If done by the Buyer, this dispatch takes place in the **Procurement WorkCenter > Reports/Processes > Processes > Dispatch POs**. 
	When canceling a Purchase Order from a Strategic Sourcing event, Cardinal asks if the quantity should be moved back into the Sourcing event. If yes, the quantity is put back to the award and can either be re-awarded to another bidder or manually closed.