

## IES Purchasing: Purchase Order Amendments

### Purpose

The purpose of this Document is to explain when and how Purchase Order Amendments may be performed.

### Introduction

All Purchase Orders start life as Proformas, i.e. until Authorized. After a Proforma has been created and saved, and before it is Authorized, it can still be amended.

After Authorization, a Purchase Order is amended only by Price Changes, Line Cancellations and Supplements (addition of new Items), and these actions are described in separate documents. Thus it may be argued that this Document is more about PROFORMA amendments, and indeed it is.

### Finding a Proforma to Amend

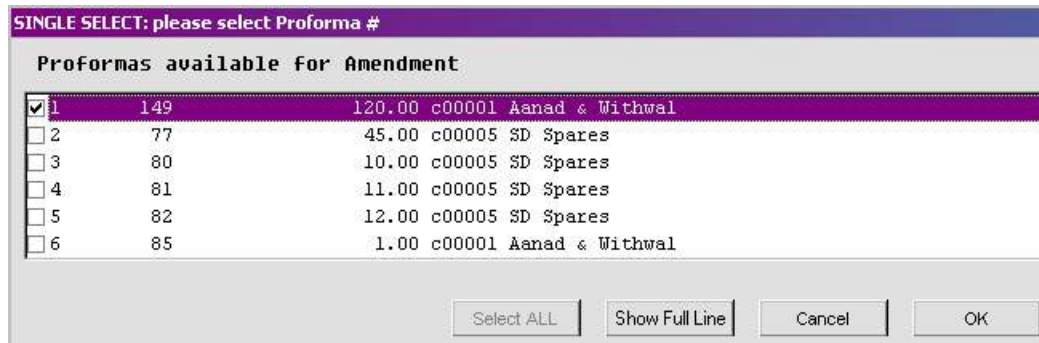



Proforma Amendment options are listed at ORIGINATION (1), from the main Purchasing options, and there are separate options listed for DDP, CP, ASO and MOD. In fact, MOD will tell you it can only be done from MOD (Manufacture) itself, while CP and ASO will only list Proformas captured by yourself. For DDP, all Proformas originated by yourself OR for which you are the assigned Authorizer, will be listed for amendment.



In all cases for CP and ASO, you will only be offered Proformas captured or generated by yourself. For DDP, you will also be offered Proformas for which you are the Authorizer, because the Authorizer may also amend a DDP Proforma. Therefore, even in the case of ASO Proformas generated in the Inventory system, you can only amend it if you are the person who performed the generation of it.

We look at the DDP example here –




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If there are any Proformas available for amendment by yourself, in the selected queue, then you will be offered a list to choose from. Upon selection, the system will open the Proforma amendment screen.

1 Main Parameters

2 Worksheet



## Amend Proforma Order



Proforma# 349 Purch No BDF 881 Authoriser Hs Data Manager Current Operator Hs Data Manager Originator Hs Data Manager Tax Type 15 Non-Capital Goods (Light) Vat Tax Rate % 19.99 Re-Charge Tax B No Tax Receipt Period 30 Dept 100 PRIVATE LEIGERS	Currency Local Date Raised 05/01/2006 Order Date 05/01/2006 Auth Code Hs Data Manager Supplier CB-0001 Amazon & Mitchell For Attention Of Delivery Inst def Main Warehouse Exp. Delivery Date 19/01/2006
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Direct Item	Unit	Tax Incl Price	Quantity	Actual
1 Midgets	ea	10.00	12.00	120.00

Direct Item Value: 120.00

CHARGE TO:

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On the Proforma Amendment screen, you can no longer change the Supplier you are ordering from, but otherwise you may add Items, delete Items and change Items.

Also, you may re-assign the target Authorizer, delete the Proforma altogether, or perform further work on the attached Worksheet(s).

The other Proforma types are the same, except that they do not offer a 'Delete' option. For Proforma Cancellation options for all Proforma types, choose CANCELLATIONS from the main Purchasing options.

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