

QUICK REFERENCE GUIDE

Updated November 1, 2019

Edit a Purchase Order

There are times where you want to edit an existing purchase order. The process to edit the purchase order depends upon its status and the type of edit. You may be able to cancel all or part of it. Or, you may need to use a change order for to edit a dispatched purchase order.

The status of the purchase order impacts the type of edit available within SWIFT.

Status of Purchase Order	Type of Edit
Dispatched to Supplier, Received or Vouchered	Use a Change Order
Dispatched to Supplier, Not Received or Vouchered	Cancel the purchase order or line

This guide lists the process steps to use a change order, cancel an entire purchase order or cancel a purchase order line.

Steps to edit a purchase order using a “Change Order”

- Step 1: Access the Purchase Order page in SWIFT
- Step 2: Edit the purchase order
- Step 3: Process the purchase order

Steps to edit an entire purchase order using “Cancellation”

- Step 1: Access the Purchase Order page in SWIFT
- Step 2: Make sure the purchase order can be cancelled
- Step 3: Cancel the purchase order
- Step 4: Budget check the purchase order

Steps to edit a purchase order line using “Cancellation”

- Step 1: Access the Purchase Order page in SWIFT
- Step 2: Cancel the purchase order line
- Step 3: Save, approve, budget check and dispatch the purchase order.

Edit an entire purchase order using a “Change Order”

Use a change order for purchase orders that you previously dispatched, received and vouchered against. Change orders are modifications of the specifications of a purchase order. Use a change order when you want to make material change to a previously dispatched purchase order. Material changes are those that impact the supplier (e.g., price, quantity, item and description).

There are limitations to changes of a purchase order once you dispatch it.

- *Supplier:* Cannot be changed unless there are no payments or receipts against it.
- *Supplier Location:* Can be changed.
- *Document Type:* Cannot be changed.
- *Quantity:* If the purchase order has been partially or fully received, the quantity cannot be reduced below the received quantity. You can increase the quantity.
- *Buyer:* Change in the *Buyer* will also create a change order.
- *Distribution:* Changes to the *Distribution* fields will trigger a change order.

Step 1: Access the Purchase Order page in SWIFT

1. Navigate to the **Purchase Order** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order, Purchase Order page defaults.
WorkCenter	Procurement, Purchasing, Buyer WorkCenter. Left menu Links, Add/Update POs, Purchase Order page.

2. On the **Purchase Order** page, select the **Find an Existing Value** tab.

SWIFT opens up the **Search Criteria** section of the **Find an Existing Value** page. Enter search items such as the *PO ID*. Press the **Search** button.

Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search | Add a New Value

▼ Search Criteria

Business Unit = [G1001] [Q]

PO ID begins with [3000004387] [X]

Origin begins with [] [Q]

Purchase Order Date = [] [Q]

PO Status = [] [Q]

Short Supplier Name begins with [] [Q]

Supplier ID begins with [] [Q]

Supplier Name begins with [] [Q]

Buyer begins with [] [Q]

Buyer Name begins with [] [Q]

PO Type = [] [Q]

Purchase Order Reference begins with [] [Q]

Hold From Further Processing

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

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SWIFT displays the **Purchase Order** page for the selected purchase order.

Step 2: Edit purchase order

1. Access the **Change Order** icon at the header of a dispatched purchase order.

The **Change Order** icon does not appear if you did not dispatch the purchase order.

Purchase Order

Business Unit	G1001	Origin:	513	Management Analysis & Developmt	PO Status	Dispatched			
PO ID	3000004506	Approval Exception		Budget Status	Valid				

2. SWIFT opens up fields to edit. Edit the purchase order as needed.

Step 3: Process the purchase order

1. After you have edited the purchase order or line(s), press the **Save** button. SWIFT will save the purchase order with the edits.
2. If you edited the ChartField information on the lines, the *Budget Status* is “Not Chk’d”. After you save it, SWIFT will change the *Status* to “Pend Appr” (Pending Approved) or “Approved” depending upon you user roles.
 - Press the **Approve** icon.
3. After it is approved, press the **Budget Check** button.
 - When the *Budget Status* is “Valid” and the *PO Status* is “Approved”, the purchase order is ready to be dispatched.

Maintain Purchase Order

Purchase Order

Business Unit	G1001	Origin:	513	Management Analysis & Developmt	PO Status	Approved			
PO ID	3000004510	Approval Exception		Budget Status	Valid				

4. Select or validate the **Dispatch Method**.

- Press the **Dispatch** button.

Purchase Order

Business Unit	R2901	Origin:	A19	ENF Central Office	PO Status	Approved			
PO ID	3000147753	Approval Exception		Budget Status	Valid				
Copy From					<input type="checkbox"/> Hold From Further Processing				
Header									
*PO Date	03/20/2019	Response Documentation			Doc Tol Status	Valid			
Expiration Date		Supplier Search			Receipt Status	Not Recvd			
*Supplier	CAMP RIPLE-001	Supplier Details			Dispatch Method	Phone	Dispatch		
*Supplier ID	0000207739	CAMP RIPLEY MESS.EJUND							

- SWIFT opens up the **Dispatch Options** page. At the bottom of the page, press the **OK** button.

SWIFT display a message to see if you want to wait for confirmation of the dispatch process.

- Select **Yes** to wait for the dispatch process to complete.
- Or, select **No** to let the batch process run the dispatch process and continue working.

You have successfully edited a purchase order.

Edit an entire purchase order using “Cancellation”

It is possible to cancel an entire purchase order for a dispatched purchase order. You can cancel a purchase order that has been dispatched but not received or vouchered against. This edit is possible for an existing purchase order if the items do not impact a supplier (e.g., ChartField or accounting information). Once you cancel a purchase order, you cannot reverse this change.

Step 1: Access the Purchase Order page in SWIFT

Use the directions outlined in Step 1 of the *Edit an entire purchase order using a “Change Order”* section of this guide.

Step 2: Make sure the purchase order can be cancelled

1. Look at these fields on the **Purchase Order** page. The *PO Status* is “Dispatched.”
2. Press the **Activity Summary** link to see if there are any receipts or invoices created against it.

PO Reference: EIOR 30711 Lodging
 Agency Reference: EIOR 30711 Lodging
 *Billing Location: R296000221
 Billing Address: Exempt From WFC
 Amount Summary: Merchandise 18,033.00, Freight/Tax/Misc. 0.00
 Activity Summary (highlighted)

SWIFT opens up the **Activity Summary** page.

- On the **Receipt** tab, view the Amount Received field. It should be blank.

Line	Item	Item Description	UOM	Amount Received	Open Quantity	Open Amount	Currency
1		Peace Officer Education Base C	EA		1.0000	66,755.000	USD

- On the **Invoice** tab, view the *Amt Invoiced* field. It should be “0.000”. Close that page.

Line	Item	Item Description	UOM	Amount Only	Amt Invoiced	Currency	Un-invoice Amour
1		Peace Officer Education Base C	EA	<input checked="" type="checkbox"/>	0.000	USD	66,755.0

- Close the **Activity Summary** page.

3. View the *Dispatch Method* before cancelling it if needed. It is on the header of the purchase order.

Once SWIFT cancels a purchase order, it will automatically re-dispatch it to the supplier depending upon the method selected. If it is set to “Phone”, SWIFT will not sent it to the supplier.

4. Access the **Cancel** icon at the header of a dispatched purchase order.

Purchase Order

Business Unit	G1001	Origin: 513	Management Analysis & Developmt	PO Status	Dispatched	▲ 📄 ✖
PO ID	3000004506	Approval Exception		Budget Status	Valid	

5. SWIFT displays a warning message. Press **Yes** to cancel.

Canceling a purchase order will commit any changes made and prevent further changes. Continue? (10200,515)

When you mark a purchase order as canceled, the system does not allow any further changes to the purchase order. Any changes made, however, will be stored on the purchase order.

Step 4: Process the edited purchase order.

SWIFT displays the **Cancel Purchase Order** page. The purchase order has a “Pending Cancel” status.

Maintain Purchase Order

Cancel Purchase Order

PO has 'Pending Cancel' status, but requires a budget check. Press the Budget Check button to run the budget checking process. Otherwise, click OK to continue without budget checking the PO. Also, PO has 'Pending Cancel' status. Dispatch PO to set the status to 'Canceled'.

Goto: [View Budget Status- Prorated](#) [Budget Status- Non Prorated](#)

1. Press the **Budget Check** button. SWIFT will release the release of an encumbrance for this purchase order after the nightly batch run. The *Status* of the purchase order will be “Pending/Cancel” until SWIFT completes the nightly batch run.
2. SWIFT returns you to the **Find an Existing Value** page.
 - Enter the *PO ID* to see if the purchase order was cancelled. SWIFT should return no matching values for that *PO ID*.

You have successfully cancelled a purchase order.

Edit a purchase order line using Cancellation

Step 1: Access the Purchase Order page in SWIFT

Use the directions outlined in Step 1 of the *Edit an entire purchase order using a “Change Order”* section of this guide.

Step 2: Make sure the purchase order line can be cancelled

You can cancel the line on a purchase order that has been dispatched but the line has not been not received or vouchered against. The *PO Status* is “Dispatched.”

1. Go to the **Lines** section, press the **Line Details** button of the line to cancel.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Twist LED lights and table top -	1.0000	LO	56101500	705.44000	705.44	Approved
2		Installation	1.0000	LO	72153606	200.00000	200.00	Approved

2. SWIFT displays the **Details for Line** page. Press the **Cancel** icon.

Details for Line 1

PO ID 3000004321 Supplier INTEREUM I-001

Line 1 Item ID Twist LED lights and table top

Line Details Category 56101500 Line Status Approved ✕ ▲

3. Respond to the message. Click **Yes** to cancel the line.

This action will cancel line 1 for this purchase order. Continue? (10200,229)

The action that you are taking will cancel this line for this Purchase Order. If you do not want to cancel this line, then you cannot perform the action at this time.

Yes No

SWIFT edits the record to show the “Canceled” *Status* for that line.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Twist LED lights and table top -	1.0000	LO	56101500	705.44000	705.44	Canceled

Step 4: Process the edited purchase order

You need to save, approve, budget check and dispatch the purchase order. Use the directions outlined in Step 3 of the *Edit an entire purchase order using a “Change Order”* section of this guide.

You have successfully cancelled a purchase order line.