Processing PO Revisions

What is a PO Revision?

A PO revision is a process in BennyBuy by which Business Centers can make certain changes to a PO such as adding new line items, changing dollar amounts, etc. Generally speaking, end users do not have access to PO revisions and should contact their Business Center to make these changes for them.

Please note that PO Revisions are not available for orders done through the Punchout or Hosted Catalogs.

Changing Quantity and Unit Price

1. To change the quantity or unit price for a line item, first navigate to the purchase order in BennyBuy. Scroll down to where the line items are listed and select the line you wish to edit.

2. The purchase request form will open. Make edits to the fields under the Purchase Details section as needed. When all edits have been made, scroll back to the top of the form. Change the Available Actions menu to **Save** and click **Go**.
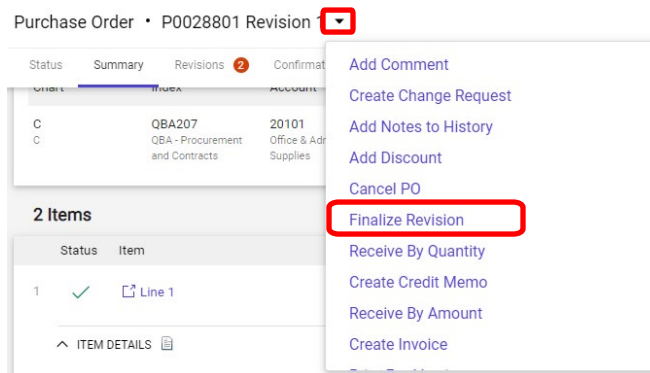
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3. The page will refresh. Scroll down to the line item and it should now be updated. Repeat this process for other lines as needed.

4. To finalize the revision, select the dropdown arrow next to the purchase order number. From the dropdown menu, select **Finalize Revision**.

5. A popup box will appear. Specify the reason for the revision in the text box. By default, the system is setup to not distribute revisions to the supplier. If you would like the revision distributed, uncheck the **Do Not Distribute PO** box. Click **Save** to finalize the revision.

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6. A confirmation message will appear. Click **Close**.

Route PO To Workflow ✕

P0028801 is placed in workflow and the revision document will be created during distribution

Close

7. All PO revisions will go to eProcurement first for review. Depending on the dollar amount and accounting codes used, other approvals may be required. Approval workflow can be viewed in the What's Next column on the right hand side.

What's next? ⌄

Workflow Status ● Pending

Workflow ⬀ 🖨

◯ Show skipped steps

✓ **Submitted**
6/17/2021 8:44 AM
Lane Byrnes

📍 **eProcurement Review**
Active · · ·

◯ **Budget Authority Approval**
Future · · ·

◯ **Business Center Approval 1**
Future · · ·

◯ **Business Center Approval 2**
Future · · ·

◯ **PCMM Approval**
Future · · ·

8. Once fully approved, the revised PO may or may not be sent to the supplier depending on the option chosen in step 5.

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Adding New Lines to a Purchase Order

1. To add new lines to a purchase order, first navigate to the purchase order in BennyBuy. Select one of the line items to open the purchase request form.

2. The form will display information for the line item you opened the form on. Update the **Product Description**, **Quantity**, and **Unit Price** fields for your new line item.

3. Scroll to the top of the form. Change the Available Actions menu to **Add to PO Revision**. Click **Go**.

4. The Add New PO: Search Purchase Orders box will open. Use the search bar at the top to find the PO you'd like to add the line item to. Select the plus symbol to add the line item to the PO.
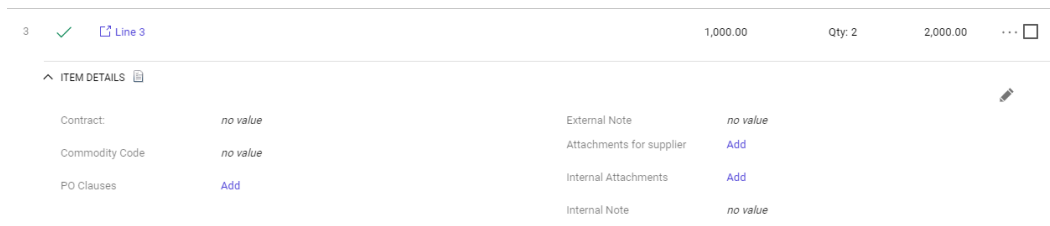
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5. Refresh the page and the new line item should be added. Repeat these steps as needed to add multiple lines.
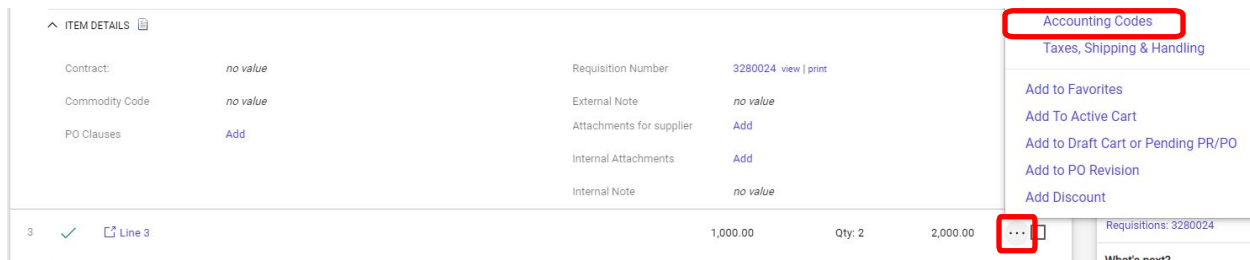
6. Repeat steps 4 – 8 as outlined above to finalize the revision and submit the PO into workflow.

Changing Accounting Codes for a Line Item

1. To process a revision to change accounting codes for a line item, you must add a new line and do line level accounting for that new line. You **cannot** just change the accounting that is already on the PO, as it will cause issues when syncing with Banner.

2. Begin by adding new line item(s) in the steps outlined above. Once you have added your new line(s), scroll down to where the line items are listed. For the new line, click the ⋯ symbol and select **Accounting Codes** from the menu.
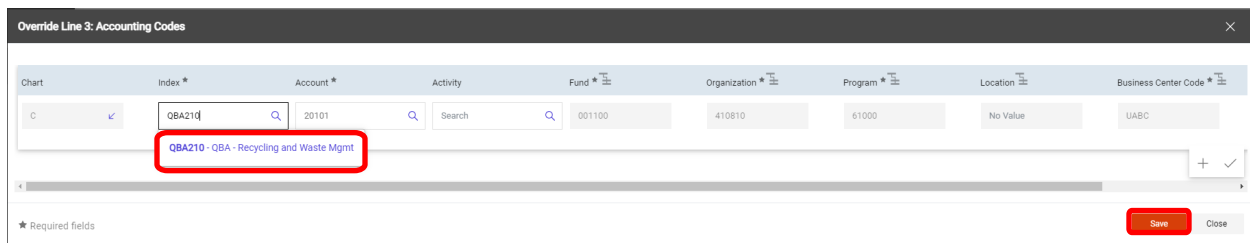
3. This will open the Override Accounting Codes box. Change the accounting codes as needed and click **Save**. If you are changing the index, make sure to choose the value that populates in the dropdown box.

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4. The new accounting codes will appear under the new line.

5. Repeat steps 4 – 8 above to finalize the revision and submit the PO into workflow.

Cancelling Purchase Orders

Prior to cancelling a PO in BennyBuy, it is always recommended to reach out to the supplier to make them aware of the cancellation.

1. To cancel an entire order, navigate to the purchase order in BennyBuy. Using the dropdown arrow next to where the purchase order number is listed, select Cancel PO.
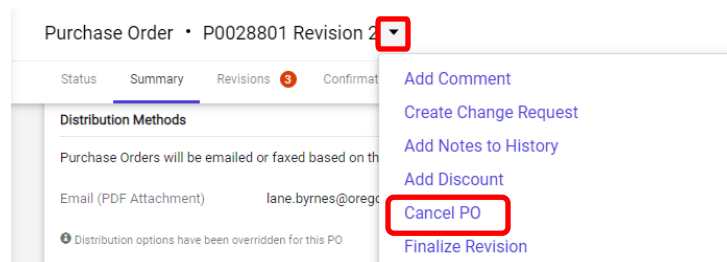
2. The Add Note box will appear. Enter a note as to why the order is being cancelled and select **Yes** to create a revision.

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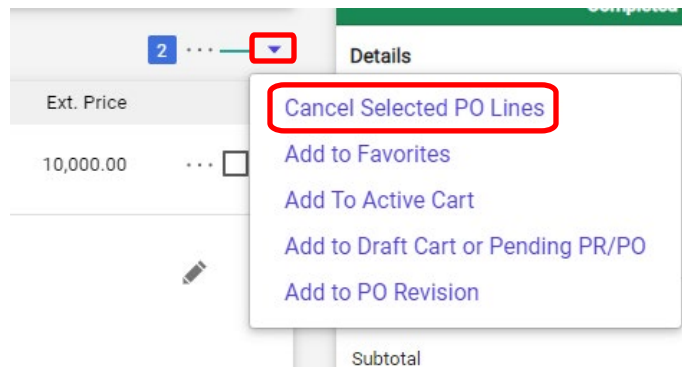3. Another popup box will appear. Enter a note for the revision and click **Save**.

4. To cancel a single (or multiple) line items on a purchase order, navigate to the PO in BennyBuy and scroll down to where the line items are listed. Use the checkboxes on the right hand side to select the lines that need to be cancelled.
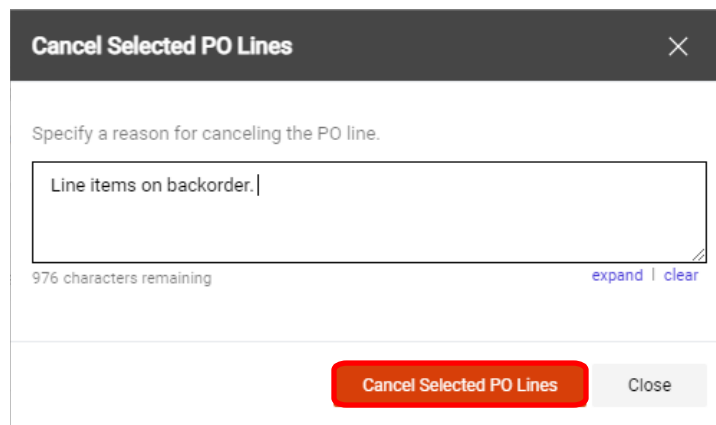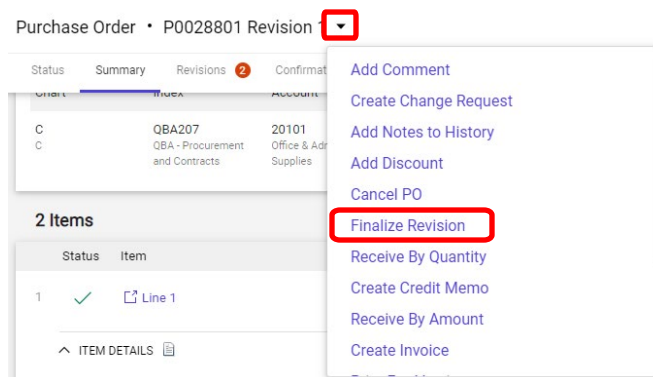
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5. Once you have selected the lines you wish to cancel, select the dropdown arrow and click **Cancel Selected PO Lines**.

6. A popup box will appear. Enter a note as to why the line(s) are being cancelled. Click **Cancel Selected PO Lines**.

7. From the dropdown arrow next to the PO number, click **Finalize Revision**.

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8. A popup box will appear. Specify the reason for the revision and click **Save**.

Route PO To Workflow ✕

NOTE: Please note finalizing a revision against an enabled vendor (Punchout or Catalog) will not transmit to the vendor for correction. Please communicate directly with your vendor contact before finalizing a revision.

PO No.   P0028801

Specify a reason for revision

Cancelling lines 2 and 3.

975 characters remaining

Do Not Distribute PO ☐

Save   Close

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