Amend a T1 Purchase Order

A purchase order is a legal contract between the University and the supplier so care must be taken when amending a PO that the supplier has agreed to any changes in cost, quantity or delivery details. Best practice is to obtain an email from the supplier confirming the changes needed and attach this to the PO amendment.

Small cost differences between an invoice value and the PO value can sometimes be resolved by Accounts Payable without amending the PO - Accounts Payable will contact the PO creator to discuss any budget holder permissions needed for this once the invoice has been received.

Purchase order amendments must go through an approval process and once approved **are not automatically issued to the supplier by T1.** If a copy of the PO amendment is required by the supplier, the PO creator must manually issue it.

There are five stages to amending a PO:

- Stage 1 - Cancel Original PO Receipt
- Stage 2 - Create PO Amendment
- Stage 3 - Approve PO Amendment
- Stage 4 - Email Amended PO to Supplier
- Stage 5 - Receipt PO Amendment

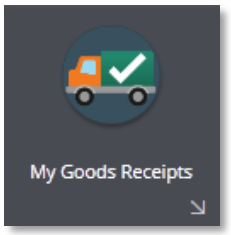
Stage 1 – Cancel Original PO Receipt

If the PO has been partially or fully receipted, the T1 goods receipt must be deleted before creating an amendment.

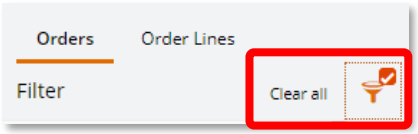
If you need to amend only part of a PO, then the goods receipt for only that part of the PO needs to be deleted.

To cancel a receipt:

1. Login to T1
2. Go to 'My Goods Receipts', on the 'My' page:

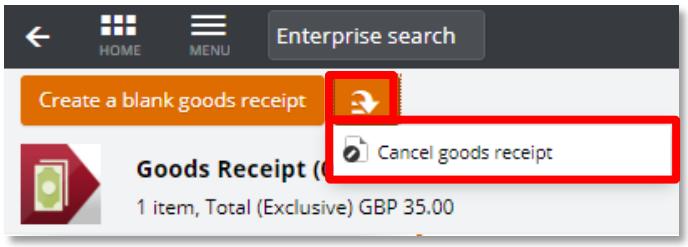


3. Remove the filter to see the list of all the receipts you have previously created. Click the filter symbol top left, then select 'Clear All':

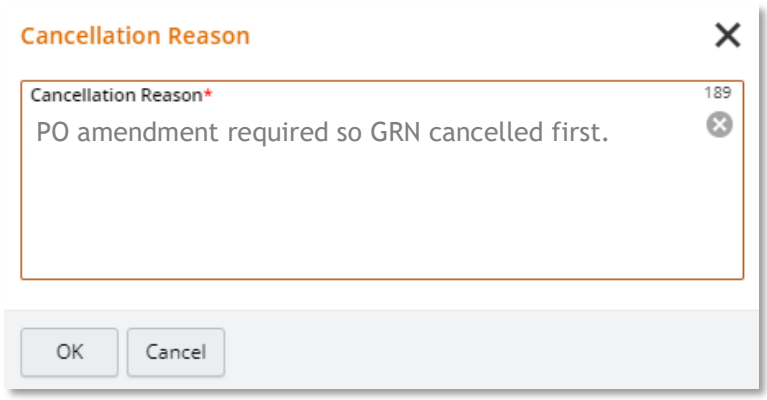


4. Locate and 'View' the relevant receipt.

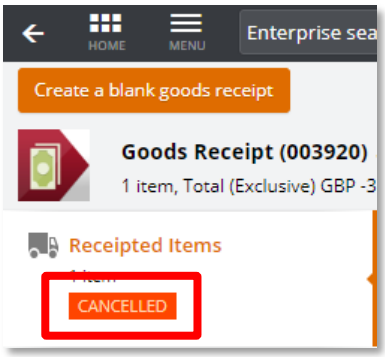
5. Once open, select the 'Cancel goods receipt' option from the orange drop-down menu, top left:



6. Enter a reason for the cancellation then click 'OK':

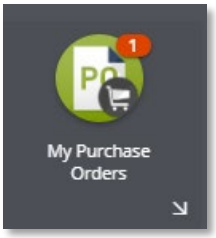


7. The status of the receipt should now update to confirm it is cancelled:

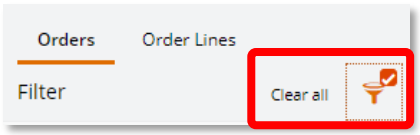


Stage 2 – Create PO Amendment

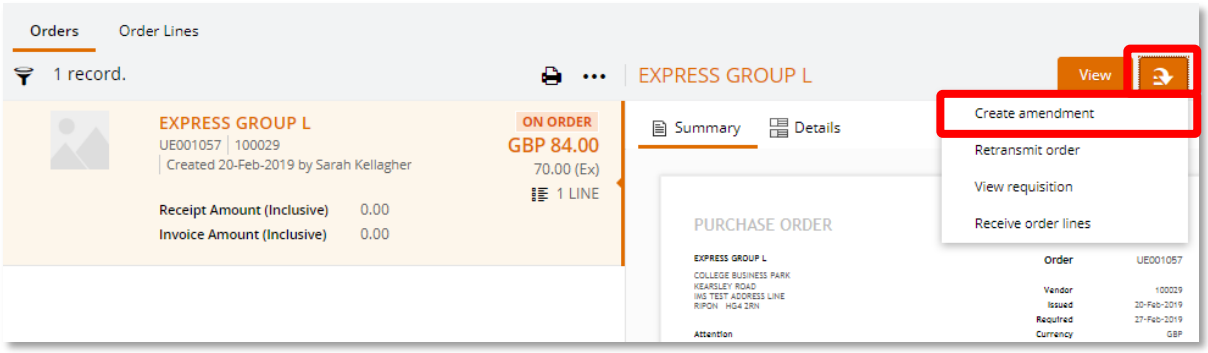
1. Once the receipt has been cancelled, go to your 'My Purchase Orders' function:



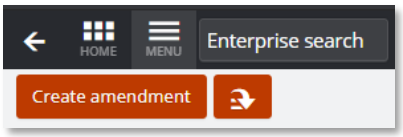
2. Remove the filter to see the list of all the POs you have previously created. Click the filter symbol top left, then select 'Clear All':



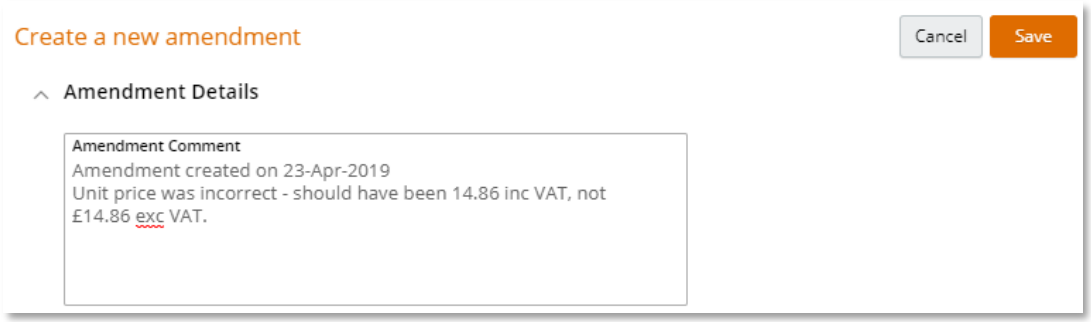
3. From the Orders list click on the one that requires amending, then click the orange drop down button and select 'Create amendment' from the options:



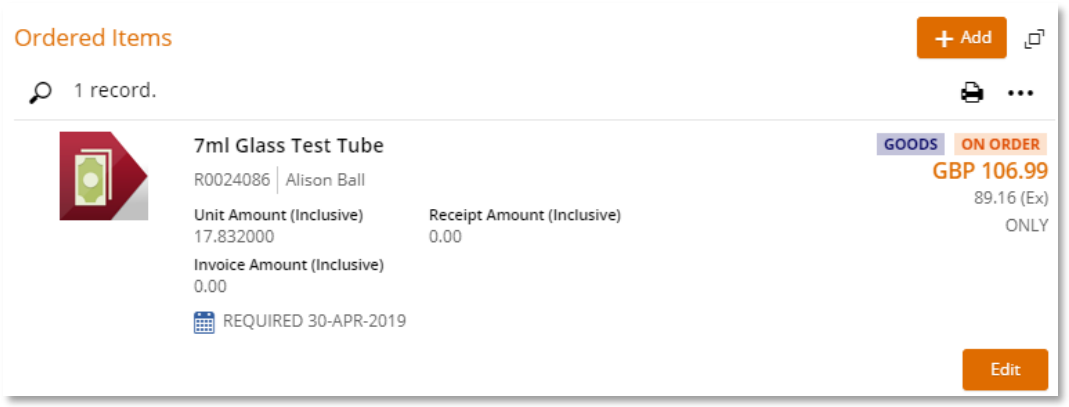
4. Or if already viewing the PO, click on the 'Create Amendment' button in the top left hand corner of the screen:



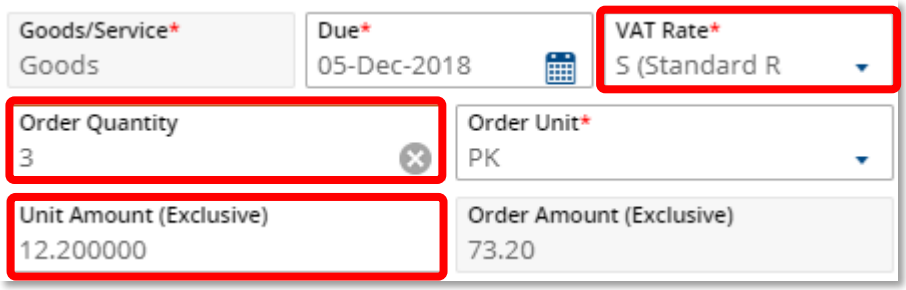
5. The following box will then appear – give details of why this PO needs amending then 'Save':



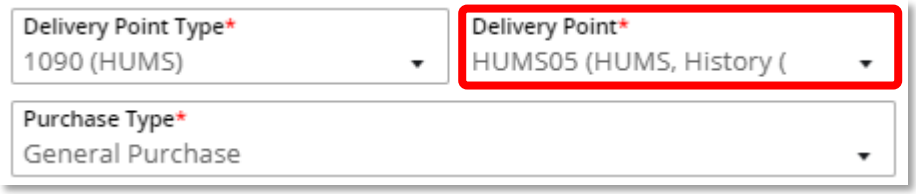
6. Click on the 'Ordered Items' tab. If there is more than one line on this PO, select the line you wish to amend and click its 'Edit' button:



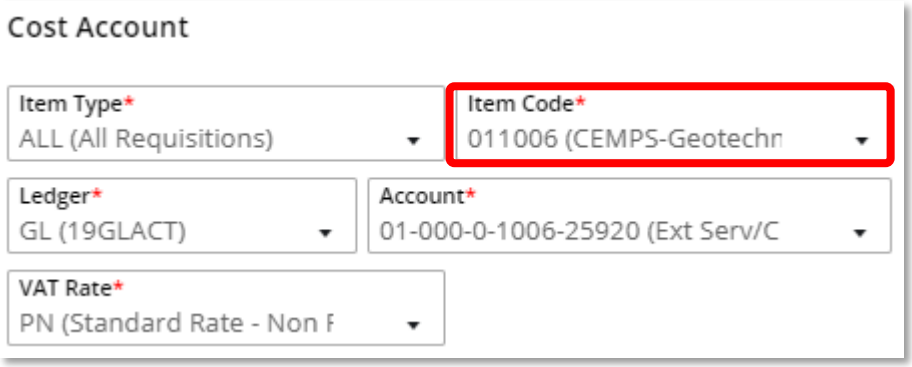
7. Make the amendment(s) needed, such as increase/decrease the quantity in the 'Order Quantity' box, change the 'VAT Rate' or the 'Unit Amount' (£ value):



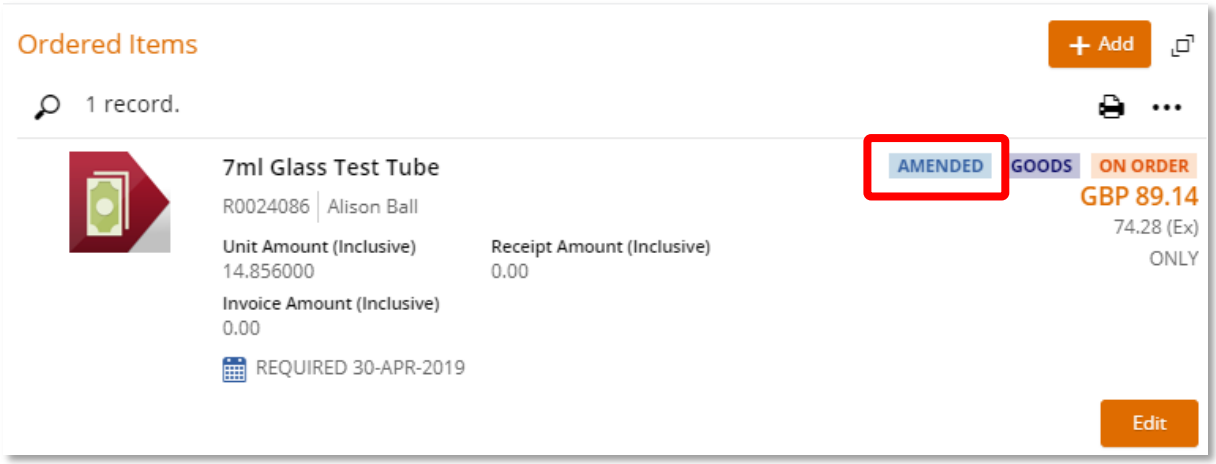
8. Or change the delivery address:



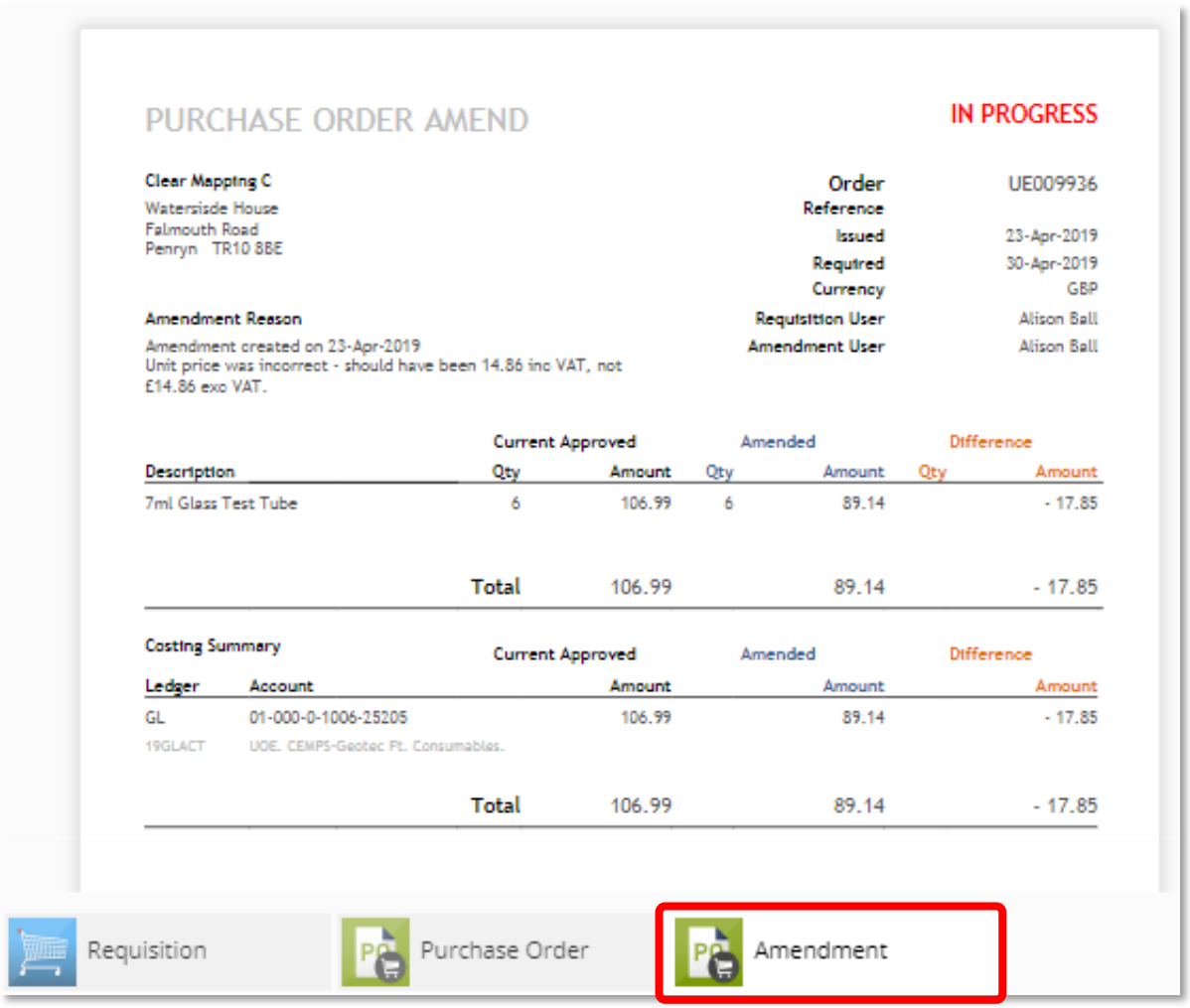
9. Or change the cost code:



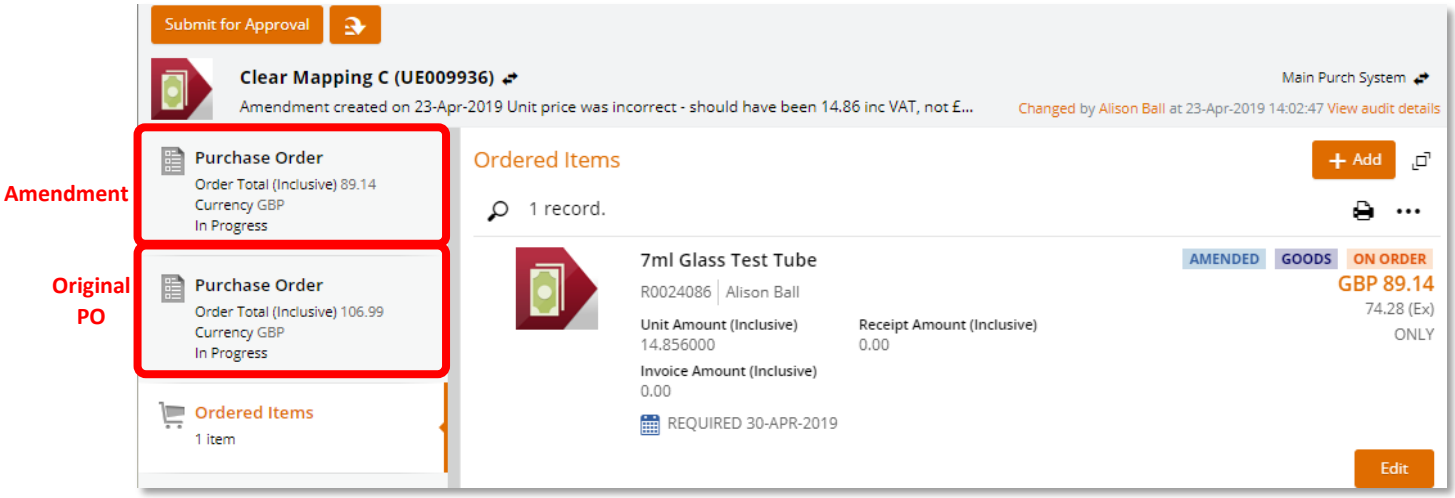
10. Then click the 'Save' button, and the PO will update with the amended details.
11. The status of the line will now show as 'Amended':



12. If using a widescreen monitor, the right hand side of the screen will have an additional icon that allows you to view the PO amendment separately to the original PO:



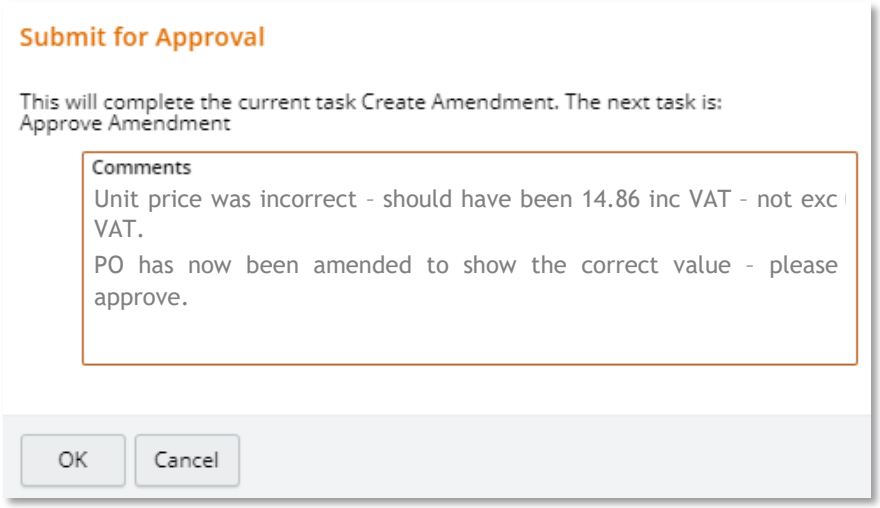
13. If using a square monitor/laptop screen, an additional tab will appear that allows you to view the PO amendment separately to the original PO:



14. Use the 'Attachments' tab to upload any correspondence from the supplier confirming the amendments needed.

15. Once all changes have been made and saved, click the 'Submit for Approval' button.

16. A pop-out approval comments box now appears. Enter information about why this change is needed – the approver will see this information on the approval task email. Then click 'OK'.



Stage 3 – Approve PO Amendment

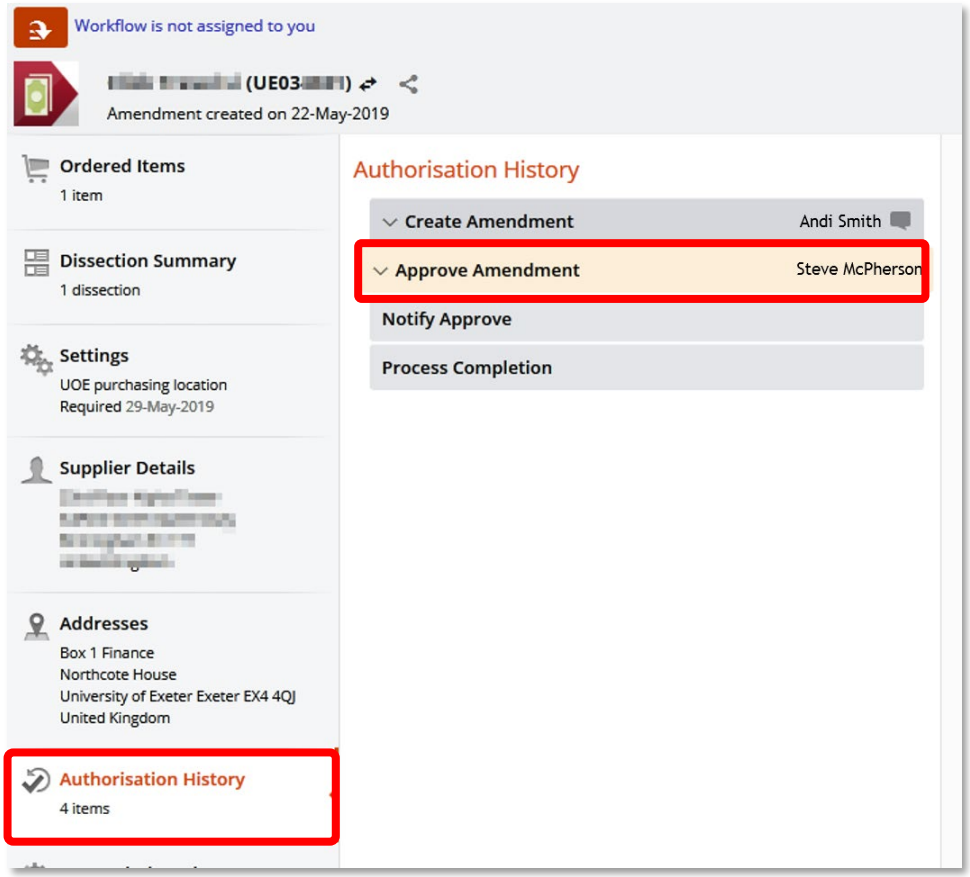
PO amendment approval tasks may need to go to the VAT Pool before going for financial approval.

Once any VAT approval has been granted, the task will then be sent directly to the **Budget Holder** to approve. Please note – PO amendments **do not** go to approval pools.

The PO creator will be emailed once the approval(s) have been carried out.

To check the approval status:

1. 'View' the purchase order and select the 'Amendment History' tab.
2. 'View' the relevant amendment.
3. Check which approver/VAT pool is currently looking at the PO amendment by clicking on the 'Authorisation History' tab. The orange line shows the current approval location:



Stage 4 – Email PO Amendment to Supplier

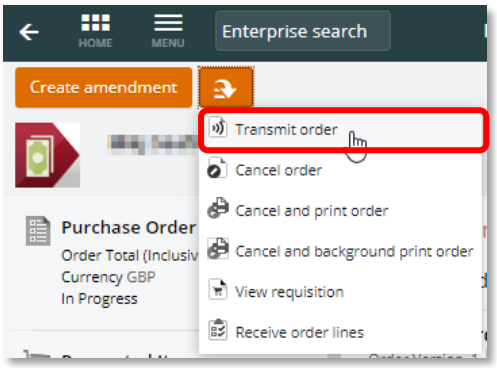
If needed, an amended purchase order can be transmitted to the supplier as long as the method of transmission in T1 is set to email.

If the method of transmission is EDI (electronic transmission), then it cannot be transmitted by T1 and would need to be downloaded as a pdf and manually emailed to the supplier.

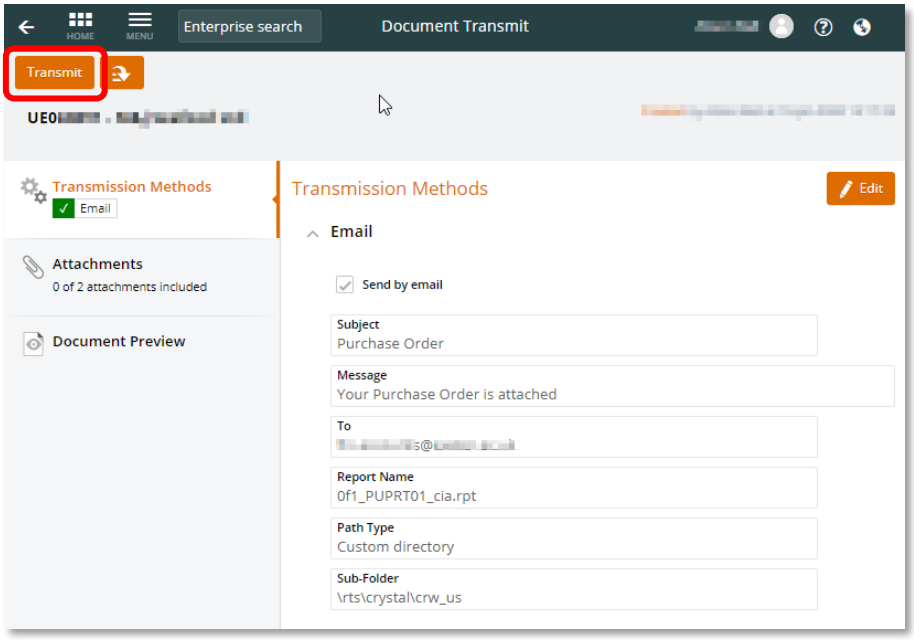
Transmission of amended POs is not automatically by T1 as many suppliers mistakenly treat an amended order as a new order and so duplicate orders can occur.

To transmit an approved amended order:

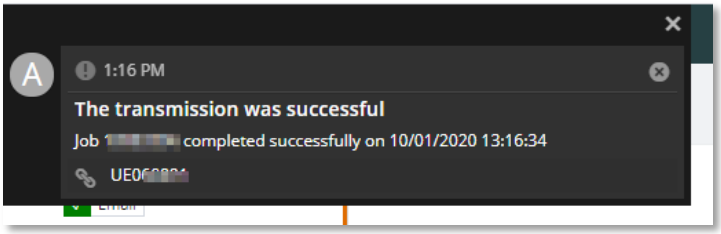
1. Click on the orange drop-down menu and select 'Transmit order':



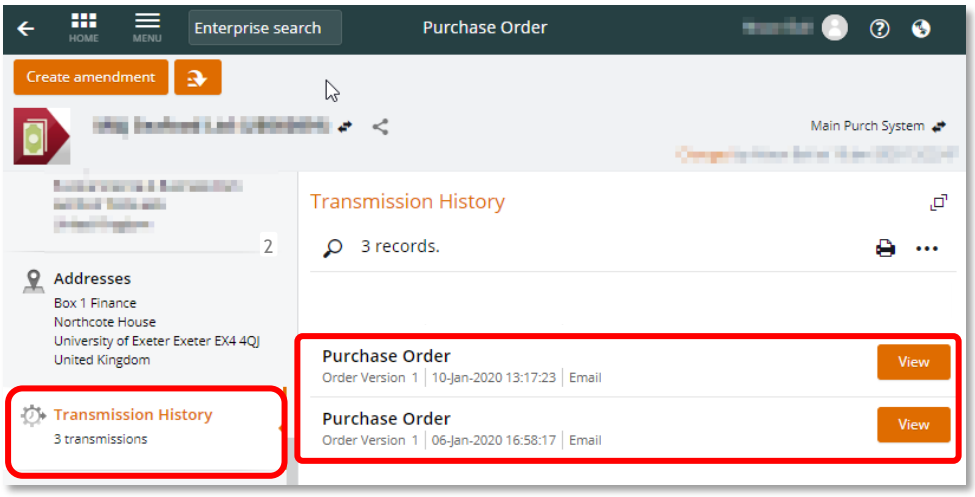
2. Check the email address is correct, then select 'Transmit':



3. T1 will notify you when it has processed your request:



4. Use the back button to go back to the 'Transmission History' tab and the list of sent purchase orders will now include this latest transmission:



Stage 5 – Receipt PO Amendment and Inform Accounts Payable

1. Once the amendment has been approved, it must be receipted or the invoice will not be paid. Full step-by-step receipting instructions are available here.
2. Finally, you may also need to confirm to the Invoice Matching Team (via AccountsPayableEnquiries@exeter.ac.uk) that the amendment has been created, approved and receipted so that the invoice can be matched to the amendment.