

## Step-by-Step Guide

### Completing the Change Order Form

- ▶ This guide demonstrates how to complete the **Change Order Form**.
- ▶ The **Change Order Form (COF)** should be submitted if there are order changes to the Purchase Order such as quantity, price or due dates.
- ▶ Change orders should **only** be submitted for Purchase Orders in excess of \$5,000.
- ▶ Change orders to close or cancel Purchase Orders under \$5,000 are handled by [CCSupport@ou.edu](mailto:CCSupport@ou.edu). Email your Purchase Order number to CCSupport and the low dollar Purchase Order will be closed/cancelled.
- ▶ Change orders should **not** be submitted for any order changes to a Purchase Order for less than \$5,000. These orders should be closed/cancelled by emailing [CCSupport@ou.edu](mailto:CCSupport@ou.edu) and a new requisition with the correct information should be entered.
- ▶ Change orders should **not** be submitted for any accounting changes. A Journal Voucher will need to be submitted to Financial Services for any accounting changes.

#### Accessing the Change Order Form

1. From [cc.ou.edu](http://cc.ou.edu) login with your 4x4.
2. From the main navigation menu select **Shop » View Forms** from the **Go To** menu or select **Forms** from the main workspace under the searching bar.
3. Select the **Order Forms** folder from the left side of the screen.
4. Click on the form titled **Change Order Form (COF)**.
5. The form will pop up in a new window.

#### Filling Out the Change Order Form

- ▶ **Complete the form using the instructions below when you have a change to a Purchase Order over \$5,000.**
1. **Enter Supplier:** The supplier name will default to the Purchasing Department

as they are responsible for processing change order requests.

2. **Purchase Order Number:** Enter in the Purchase Order number for the order that requires a change.
3. **Total amount to be revised to Purchase Order, if applicable:** If the **COF** is being completed to change the amount of a Purchase Order, enter in the revision amount.
4. **Total amount of revised Purchase Order:** If the **COF** is being completed to change the amount of a Purchase Order, enter in the new total amount for the Purchase Order.
5. **Commodity Code:** Select the most appropriate commodity code from the dropdown list.
6. **Reason for change:** Select from the dropdown menu the reason for the change. Options for changes are:
  - a. **Change Purchase Order**
  - b. **Change Due Date**
  - c. **Close Purchase Order**
  - d. **Decrease Amount**
  - e. **Decrease Quantity**
  - f. **Increase Amount**
  - g. **Increase Quantity**
  - h. **Other**
7. **Additional Changes:** If additional changes to the Purchase Order are needed, use the dropdown menu to select the additional change needed. Options for additional changes are:
  - a. **Change Catalog Number**
  - b. **Change Commodity Code**

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- c. **Change Product/Service Description**
  - d. **Change Ship to Location**
  - e. **Change Unit of Measure**
8. **Additional Information:** So that your **COF** can be processed appropriately, please list an explanation for the changes. Also, if the changes apply to a particular line on the Purchase Order, please indicate that information in this section.
9. **Internal Attachments:** These are attachments that stay with your requisition and are visible to those in CrimsonCorner who can review your requisition. To add an internal attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
10. **External Attachments:** These are attachments that stay with your requisition, that are visible to those in CrimsonCorner who can review your requisition and that will be dispatched to the supplier with your Purchase Order. To add an external attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
11. *All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.*

#### Available Actions

- ▶ Once the form is complete, you will need to select the appropriate action from the dropdown list of Available Actions.
  - ▶ The Available Actions menu provides options when completing a form.
1. **Add and go to Cart:** This option adds the current form to your shopping cart

and returns you to the shopping cart screen.

2. **Add to Cart and Return:** This option adds the current form to your shopping cart. The form page displays with the previously selected supplier and all other fields are reset to blank.
3. **Add to Cart:** This option adds the current form to your shopping cart. The form page remains completed. This option eliminates redundant data entry by using the existing form data as a template.
4. **Add to Draft Cart or Pending Req/PO:** This option adds the form to a draft cart instead of the active shopping cart.
5. **Add to Favorites:** This option will allow you to add this form to your Favorites. See **Creating and Using Favorites** for more information.