

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.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ Line 1			10,000.00	Qty: 1	10,000.00	... □
^ ITEM DETAILS 							
Contract:		<i>no value</i>	Requisition Number	3280024 view print			
Commodity Code		<i>no value</i>	External Note	<i>no value</i>			
PO Clauses		Add	Attachments for supplier	Add			
			Internal Attachments	Add			
			Internal Note	<i>no value</i>			

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**.


Purchase Details ?

Product Description
44 characters remaining [expand](#) | [clear](#)

Quantity

Unit Price

Catalog No.

Available Actions: 

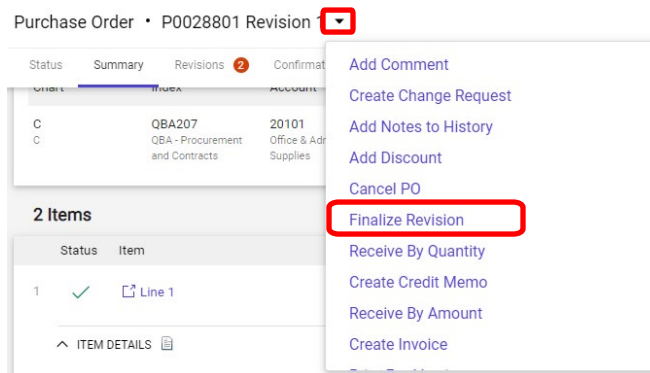
Processing PO Revisions

- The page will refresh. Scroll down to the line item and it should now be updated. Repeat this process for other lines as needed.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ Line 1			15,000.00	Qty: 2	30,000.00	⋮ □

ITEM DETAILS			
Contract:	no value	Requisition Number	3280024 view print
Commodity Code	no value	External Note	no value
PO Clauses	Add	Attachments for supplier	Add
		Internal Attachments	Add
		Internal Note	no value

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



- 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.

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

Revision changes quantity and amount for line item 1. |

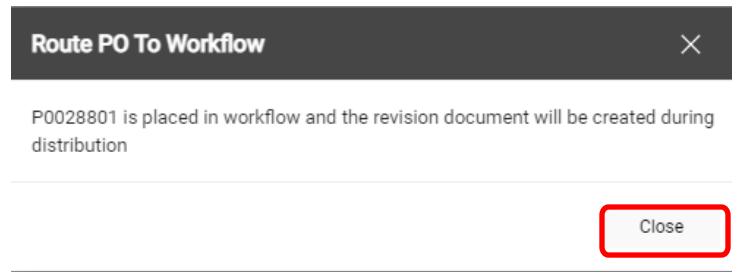
947 characters remaining

Do Not Distribute PO

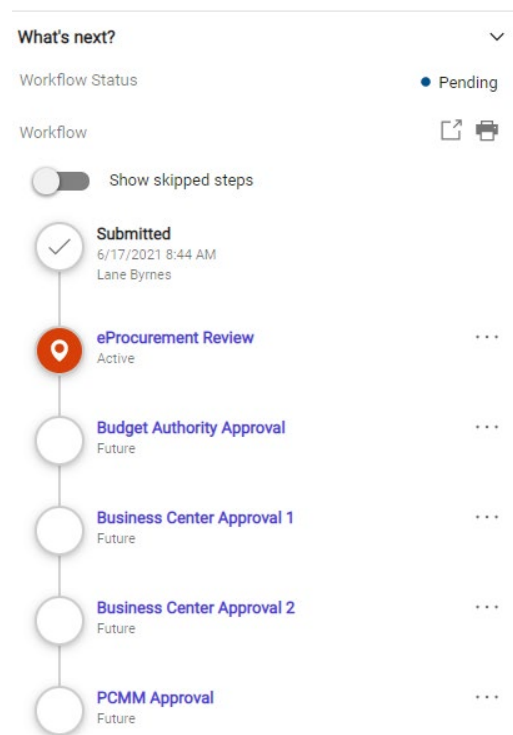
[Save](#) [Close](#)

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



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.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ Line 1			10,000.00	Qty: 1	10,000.00	⋮ □

ITEM DETAILS

Contract:	no value	Requisition Number	3280024 view print
Commodity Code	no value	External Note	no value
PO Clauses	Add	Attachments for supplier	Add
		Internal Attachments	Add
		Internal Note	no value

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.

Purchase Details ?

Product Description
44 characters remaining [expand](#) | [clear](#)

Quantity

Unit Price

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

Available Actions: Add to PO Revision Go Close

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.

Add New PO: Search Purchase Orders ×

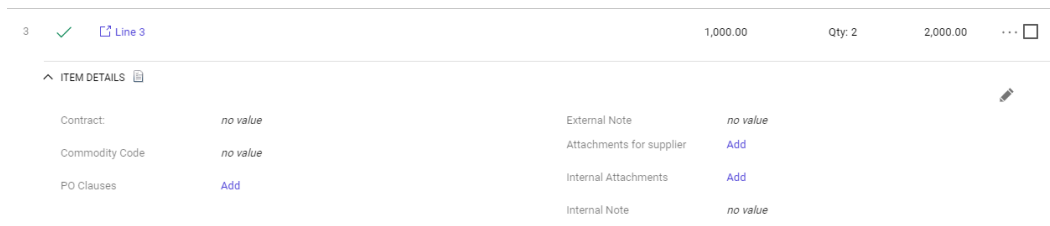
Created Date: All P0028801 [Q](#) [?](#) [Add Filter](#)

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Shopper	Shipment Status	Matching Status	Total Amount	
P0028801	Alex's Awesome Air Balloons INC	6/17/2021 8:44:16 AM	Completed	3280024	Lane Byrnes	Sent To Supplier	No Matches	25,000.00 USD	+

Close

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- Refresh the page and the new line item should be added. Repeat these steps as needed to add multiple lines.



3 ✓ Line 3 1,000.00 Qty: 2 2,000.00 ...

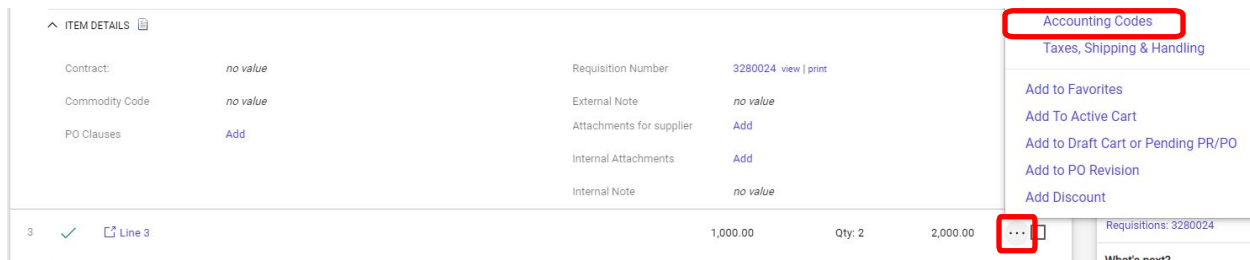
ITEM DETAILS

Contract	no value	External Note	no value
Commodity Code	no value	Attachments for supplier	Add
PO Clauses	Add	Internal Attachments	Add
		Internal Note	no value

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

Changing Accounting Codes for a Line Item

- 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.
- 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.



ITEM DETAILS

Contract	no value	Requisition Number	3280024 view print
Commodity Code	no value	External Note	no value
PO Clauses	Add	Attachments for supplier	Add
		Internal Attachments	Add
		Internal Note	no value

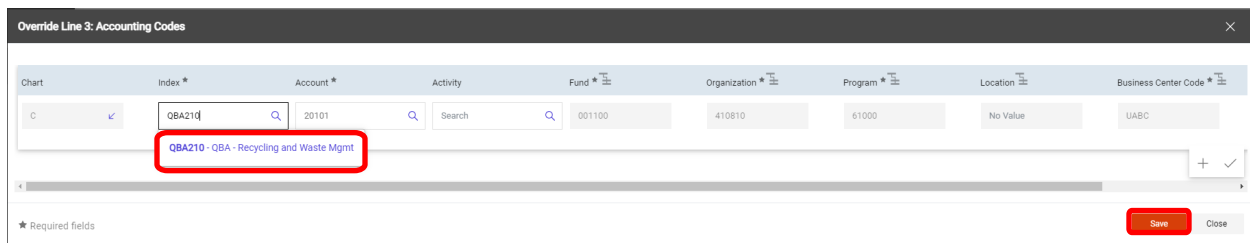
3 ✓ Line 3 1,000.00 Qty: 2 2,000.00 ...

- Accounting Codes
- Taxes, Shipping & Handling
- Add to Favorites
- Add To Active Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Add Discount

Requisitions: 3280024

What's next?

- 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.



Override Line 3: Accounting Codes

Chart	Index *	Account *	Activity	Fund *	Organization *	Program *	Location	Business Center Code *
C	QBA21Q	20101	Search	001100	410810	61000	No Value	UABC
	QBA210 - QBA - Recycling and Waste Mgmt							

* Required fields

Save Close

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

The screenshot shows a purchase order line item with the following details:

- Line 3: 1,000.00, Qty: 2, 2,000.00
- ITEM DETAILS: Contract, Commodity Code, PO Clauses, External Note, Attachments for supplier, Internal Attachments, Internal Note.
- ACCOUNTING CODES: Values have been overridden for this line.

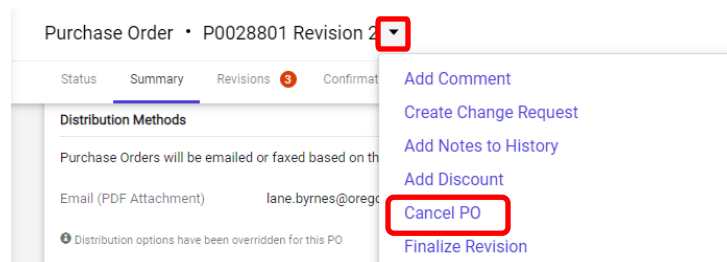
Chart	Index	Account	Activity	Fund	Organization	Program	Location	Business Center Code	Fund Type
C	QB4210	20101	no value	001100	410830	51500	no value	UABC	11
	SB4-Recycling and Waste Mgmt	Office & Administrative Supplies		240-1000 General Fund Operations	SB4-Recycling and Waste Mgmt	Waste Disposal		University Administration Business Center	Budgeted Operations

- 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.

- 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.



- The Add Note box will appear. Enter a note as to why the order is being cancelled and select **Yes** to create a revision.

The screenshot shows the 'Add Note' dialog box with the following details:

- Title: Add Note
- Text: Specify a reason for canceling the PO.
- Input field: Order is no longer needed.
- Character count: 974 characters remaining.
- Buttons: Yes, No, Cancel.

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- Another popup box will appear. Enter a note 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

984 characters remaining

Do Not Distribute PO

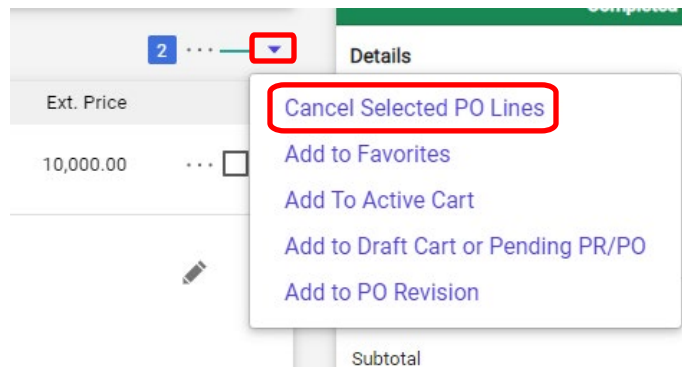
Save Close

- 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.

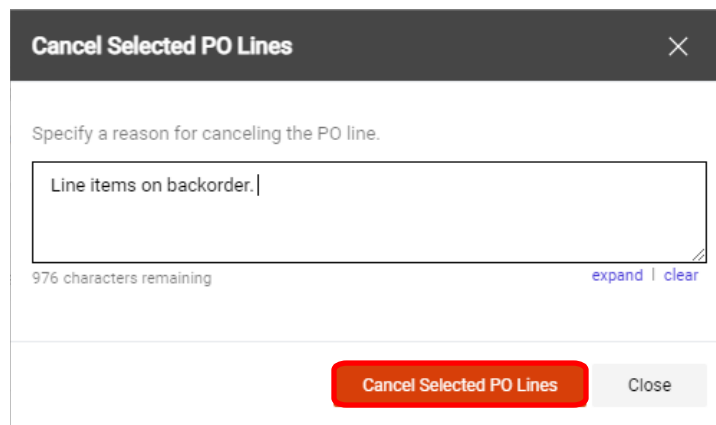
Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ Line 1			10,000.00	Qty: 1	10,000.00	☐
^ ITEM DETAILS							
Contract:		no value	Requisition Number	3280024 view print			
Commodity Code		no value	External Note	no value			
PO Clauses		Add	Attachments for supplier	Add			
			Internal Attachments	Add			
			Internal Note	no value			
2	✓ Line 2			15,000.00	Qty: 1	15,000.00	☑
^ ITEM DETAILS							
Contract:		no value	Requisition Number	3280024 view print			
Commodity Code		no value	External Note	no value			
PO Clauses		Add	Attachments for supplier	Add			
			Internal Attachments	Add			
			Internal Note	no value			
3	✓ Line 3			1,000.00	Qty: 2	2,000.00	☑

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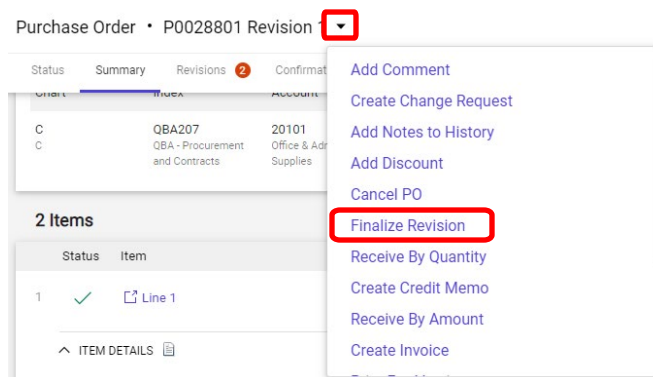
- Once you have selected the lines you wish to cancel, select the dropdown arrow and click **Cancel Selected PO Lines**.



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



- 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

975 characters remaining

Do Not Distribute PO

Save Close