

SUBJECT	Date
YARDI VOYAGER PROCEDURES MANUAL CHANGE ORDERS	08-01-23

PURPOSE: Increase the amount of the Original Purchase Order

PREPARED BY: SM or DM

WHEN PREPARED: **AFTER a Purchase Order has been Approved**

After a Purchase Order has been approved, you may find out that you under estimated the cost of the goods/services. When this happens, you DO NOT create a new Purchase Order for the difference, instead, you create a Change Order for the difference.

Change Orders are only used to INCREASE the value of your Purchase Order.

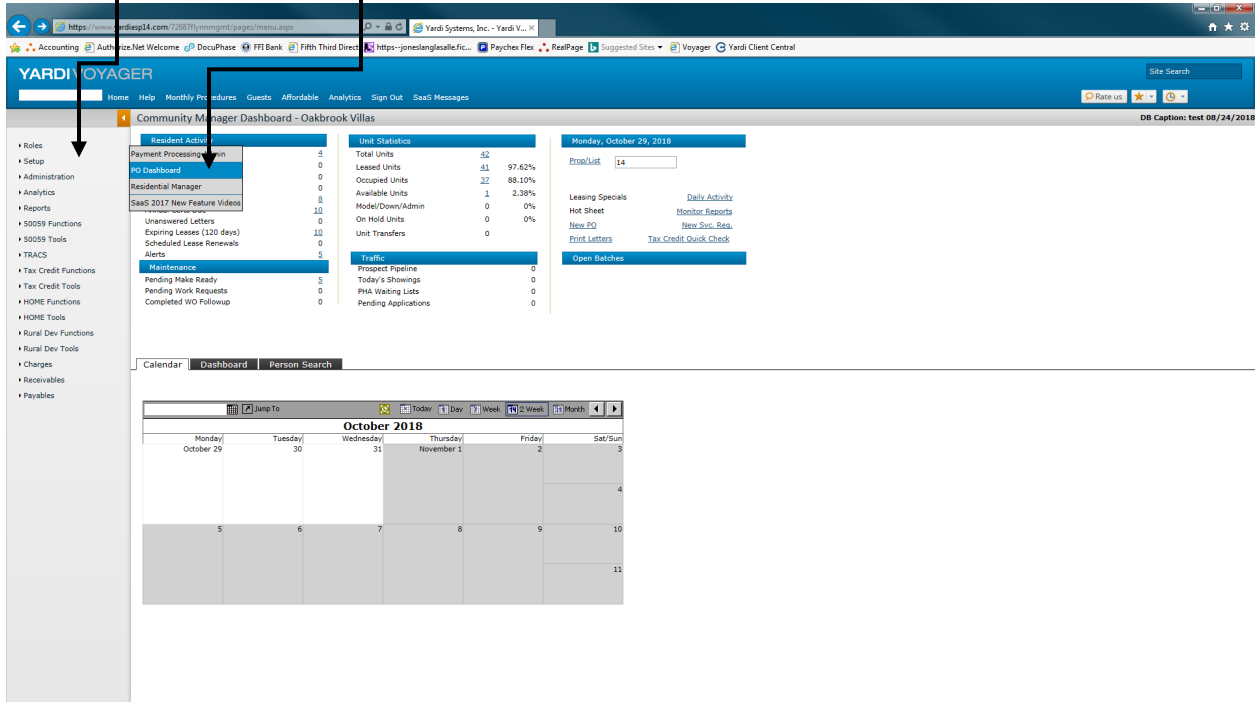
The INCREASE is to be for the goods/services, not for shipping & tax.

Example 1: You place an order with HD Supply for 10 items totaling \$475. All 10 items are on the invoice and the invoice is for \$475 of goods, \$20 shipping and \$33.25 of tax. You do not need to do a change order for the \$53.25 worth of shipping & tax. Accounting will expense the additional fees accordingly.

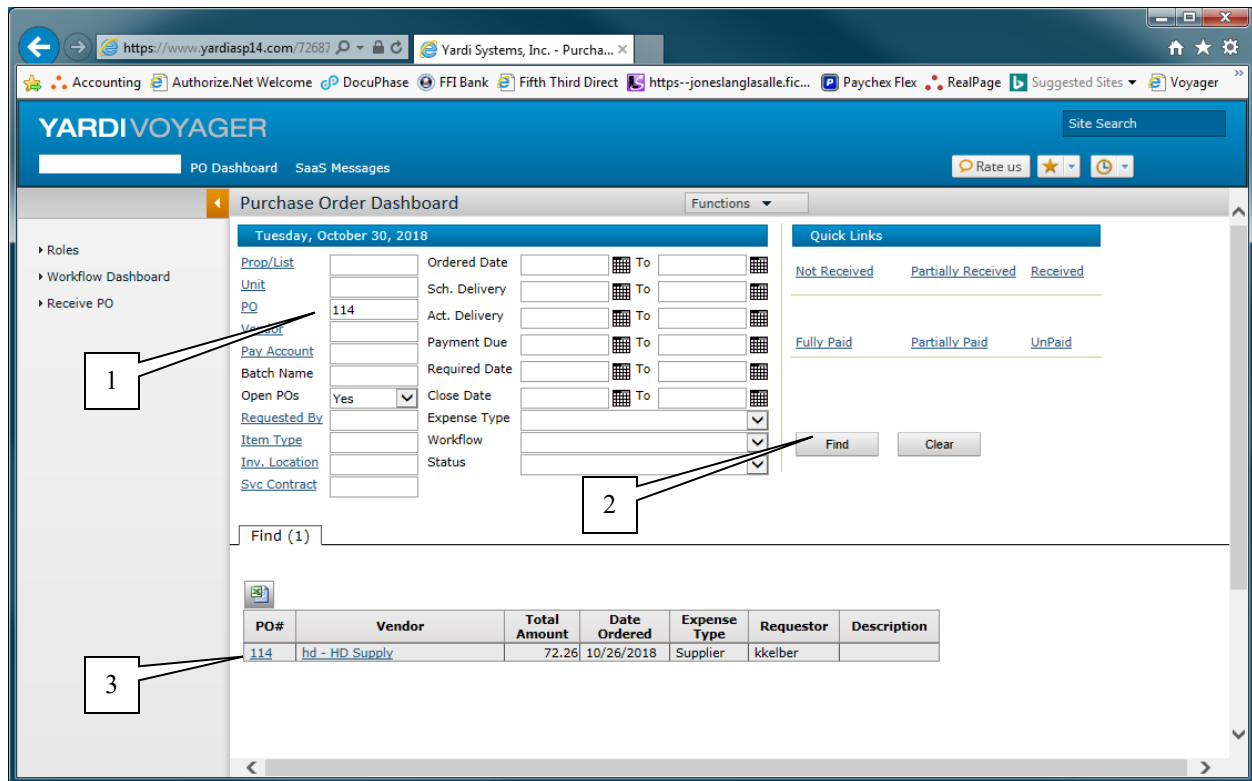
Example 2: You place an order with HD Supply for 10 items totaling \$475. All 10 items are on the invoice and the invoice is for \$492.50 of goods, \$20 shipping and \$33.25 of tax. You need to create a change order for \$17.50, which is the INCREASE in cost of goods. All goods/services must be approved and the only way for this increase to be approved, is to create a Change Order.

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CHANGE ORDERS	

Locate the Original Purchase Order
From Roles – Select PO Dashboard



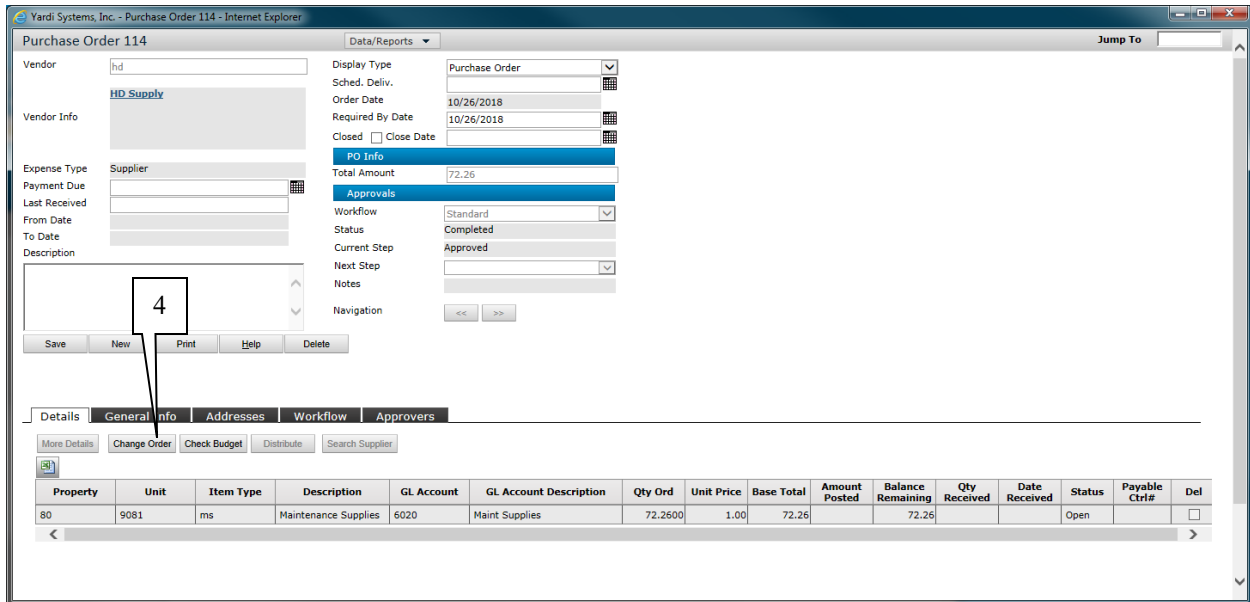
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(1) Enter the Original Purchase Order number and click on **(2)** **Find** or leave the PO field blank and click on **Find** to display all of your Open PO's that are available for a Change Order.

(3) Click on the PO# Hyperlink to open the Original Purchase Order

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(4) The **Change Order** button is available on Approved Purchase Orders. Click on the button to create a Change Order.

The Change Order is now linked to the Original Purchase Order. The Original Purchase Order is now known as the Parent PO.

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The screenshot shows the 'Change Order' form in a web browser. The form includes sections for Vendor (HD Supply), Parent PO (114), Display Type (Purchase Order), Order Date (10/30/2018), and PO Info (Total Amount, Approvals, Workflow, Status, Current Step, Next Step, Notes). A callout box with the number '5' points to the 'Save' button. Below the form are tabs for Details, General Info, Addresses, Workflow, and Approvers, and a table with columns for Property, Unit, Item Type, Description, GL Account, Qty Ord, Unit Price, Base Total, Amount Posted, Balance Remaining, Qty Received, Date Received, Status, Payable Ctr#, and Del.

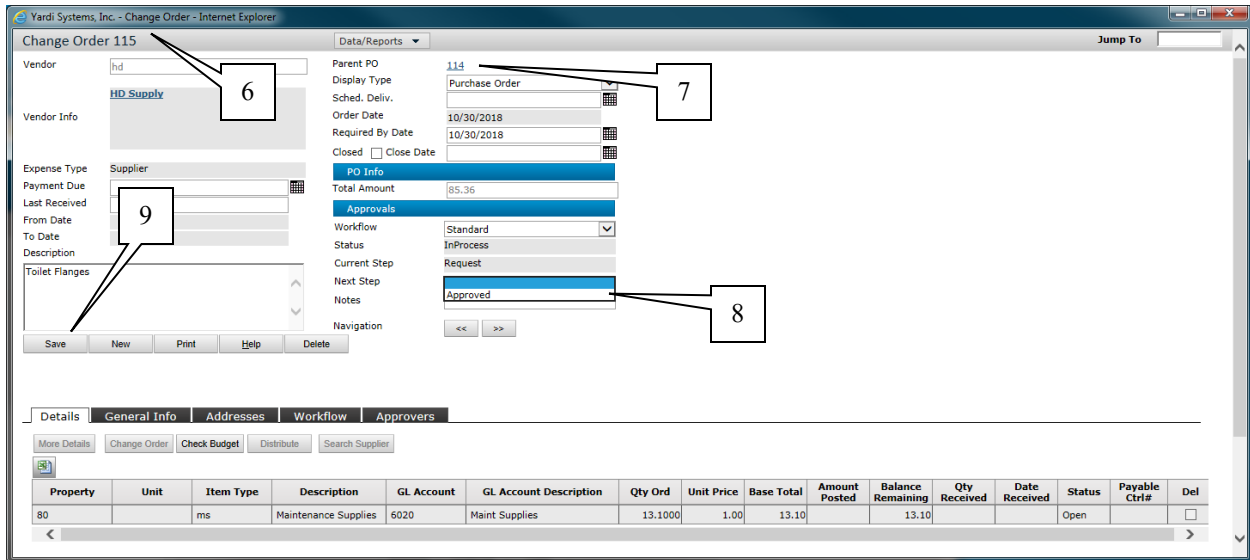
Property	Unit	Item Type	Description	GL Account	GL Account Description	Qty Ord	Unit Price	Base Total	Amount Posted	Balance Remaining	Qty Received	Date Received	Status	Payable Ctr#	Del
80		ms	Maintenance Supplies	6020		13.10	1.00								<input type="checkbox"/>

Complete the Change Order for the INCREASED amount. Refer to Procedure V-410 Creating Purchase Orders to complete all of the fields on the Change Order.

In this example, the Toilet Flanges for \$13.10 were not included on the Original Purchase Order.

(5) Once all fields are complete, click on the **Save** button.

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(6) Your Change Order has now been assigned its own Purchase Order Number

(7) Your Change Order is linked to the Original Purchase Order, now known as the Parent PO

(8) Select your Next Step. The Change Order goes through the same approval process as the Purchase Order

(9) Click on the **Save** button.