Amending Purchase Orders (PO Requests)

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Purchase orders in Dynamics GP can be amended through eRequest by the request originator or the request approver. In order to do this the user must have been granted permission by the administrator in the management studio to amend PO for the request form. If the option is selected for the user on the request form, the user will be able to amend purchase orders after they have been approved and submitted to Purchase Order in Dynamics GP. Only Purchase Order lines that have not been shipped or invoiced may be amended.

Purchase Order amendment is performed by pressing the “Amend PO” button from the Request window. Find your request on one of the views and open it. When a request has been transferred to a Purchase Order, the lines will show a Purchase Order number click on the Amend PO button and eRequest will prompt you that you are about to Amend PO information for this request and ask if you are sure. On clicking on the ‘OK’ button. The non received items on Purchase Order in Dynamics GP will be cancelled and the request will be brought back into the users Draft Folder.

At this point, it is deemed that the expense has been authorised so as long as the amended request does not exceed the authorised spend, the original user is able to make the amendment and ‘authorise’ this change thus creating the amendment on the Purchase Order. i.e. the amended Request does not need to be resubmitted through the approval hierarchy if the value of the amended request does not exceed the original request.

If the amended request exceeds the original value then the expense is not authorised and so when the original user tries to ‘approve’ it, eRequest will display a message that “You cannot approve this request, it is beyond the Pre-POAmend Approval Limit”.

The user will then need to submit the amended request through the approval hierarchy. The approval hierarchy is set by the originating group so only the list of users that were previously allowed to approve the request will be able to re-approve the amended request. A message is displayed on the Request to show that it is a ‘PO Amendment’ and all the changes that the user has made are available to view in the Request History seen through the History button.

In Dynamics GP, the amended Purchase Order is seen as a new purchase order with the original number and a suffix of nnnn which is a sequential number. This allows for complete traceability and audit control in Dynamics GP.