

# How to Create Change Order

**\*\*When creating a change order, do **not** select “Save for later.” Your change order process will not be saved, and a purchasing agent will have to cancel the Change Order\*\***

1. On the Workday search box, type in Create Change Order and select

The screenshot shows the Workday search interface. The search bar contains the text "create change order". Below the search bar, under the "Tasks and Reports" section, the option "Create Change Order" is highlighted with a red box. A toggle switch for "Simplified Search is Disabled" is visible below the search bar.

2. Type in the Purchase Order Number that you wish to increase or decrease and select OK.

The screenshot shows the "Create Change Order" dialog box. The title bar says "Create Change Order". Below the title bar, there is a field labeled "Purchase Order to Change" with a dropdown menu icon. At the bottom of the dialog, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

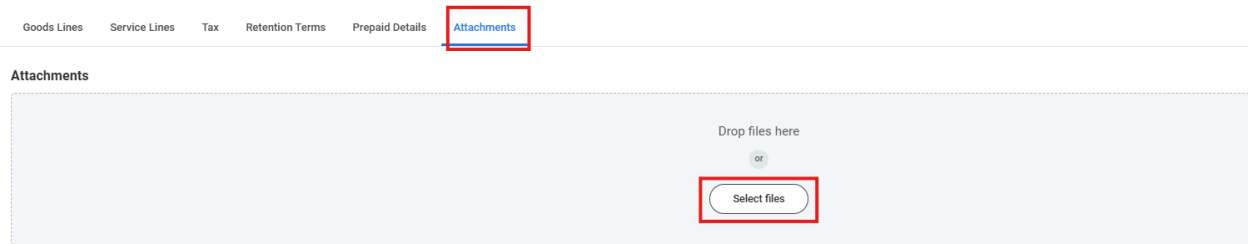
3. Next, please type in under Comments your Change Order reason.

The screenshot shows the "Create Change Order" form. The title bar says "Create Change Order". Below the title bar, there is a field labeled "Purchase Order" with a dropdown menu icon. Below that, there is a section labeled "Change Order Reason" with a dropdown menu icon. Under this section, there is a field labeled "Comments" with a text area for input. The "Comments" label is highlighted with a red box.

4. Scroll down to Service/Goods Line and change the amount.

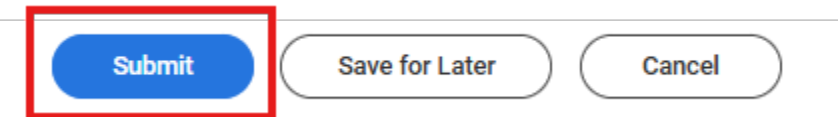
The screenshot shows the "Service Lines" tab in the Workday system. The table has columns for Item, Description, Commodity Code, \*Spend Category, Tax, Tax Recoverability, Tax Option, Amount, and Due. The "Amount" column shows "Ordered 1,500.00". The "Description" column contains the text: "Bach Training and Development will teach Team Building: The Key to Success in the Workplace scheduled on March 27, 2025 for the Town of Jupiter." The "Spend Category" column shows "Instructional Services". The "Tax" column shows "Tax Applicability" and "Tax Code". The "Amount" column shows "Ordered 1,500.00", "Received 0.00", and "Involved 0.00". The "1,500.00" value is highlighted with a red box.

5. You **must** attach a revised quote or invoice as backup to match the increased amount.



The screenshot shows a navigation bar with tabs: Goods Lines, Service Lines, Tax, Retention Terms, Prepaid Details, and Attachments. The Attachments tab is highlighted with a red box. Below the navigation bar, the word "Attachments" is displayed. A large light blue area contains the text "Drop files here" and "or" above a button labeled "Select files", which is also highlighted with a red box.

6. Select Submit – do **not** save for later as you will not be able to access it.



The screenshot shows three buttons: "Submit" (a blue button with white text, highlighted with a red box), "Save for Later" (a light gray button with dark gray text), and "Cancel" (a light gray button with dark gray text).

**Note:** If you do not have access to submit a change order, please submit an OIT ticket –

Administrative Applications & Reporting – Workday – Workday Access