

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

### 3. Amend a Purchase Request

- 3.1 Introduction** This procedure describes the process to enter a purchase request amendment in CSPS. The purchase request modification data is entered via the CSPS “Purchase Request Change Order Screen” (FM014).
- 3.2 Who Performs the Procedure** Requisitioners will primarily be responsible for entering purchase request modifications.
- 3.3 Initiating the Process** The process begins once a purchase request is fully approved, and it becomes necessary to change information. Fields such as the line item description, line item quantity, line item unit price, line item ACCS, line item FEDSTRIP, and line item distribution cost between accounting codes can all be edited on this screen. The screen is not used to make changes to non-financial data such as: suggested vendor, suggested buyer, requested delivery date, delivery point-of-contract, receiving office, acceptance employee, contracting office, or document type.
- An amendment to a purchase request/line item cannot be created if the original purchase request/line item has been tied to a purchase order or the purchase request/line item has been “flagged” for award following the system’s RFQ process. In addition, only modifications and cancellations can be made to existing line items on a document. No additional line items or MDLs may be added or deleted from a document.
- 3.4 Accessing the System** From the Main Menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select “FM014 - Purchase Request Change Order”. Follow the steps below for FM014.

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- 3.5 Amending Existing Line Item Data** This procedure describes the steps necessary to modify information on an existing purchase request.

*FM014 p1 - Purchase Request Change Order Screen*

STEP	ACTION
1.	In the <b>DOC TYPE</b> field, POREQ will default in as the document type.
2.	In the <b>DOC NO</b> field, double click on the field to view the list of requisitions. Select the applicable document number by double clicking on it or clicking on it once and then clicking "OK".
3.	Navigate through the data fields on FM014 by hitting TAB, ENTER or CLICKING and the system will populate the required fields.
4.	The <b>TOTAL \$ CURRENT</b> field will default based on the value of the original purchase request.

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STEP	ACTION
5.	The <b>TOTAL \$ REVISED</b> field will default based on the value of the changes which have been made to the purchase request.
6.	The <b>DIFFERENCE</b> field is system generated and calculates based upon the total dollar difference between the <b>TOTAL \$ CURRENT</b> and <b>TOTAL \$ REVISED</b> fields.
7.	The <b>LINE ITEM #</b> field is system generated and identifies the various line items on the purchase request. Line item numbers are assigned sequentially.
8.	The <b>FEDSTRP</b> field indicates whether the <b>FEDSTRIP</b> field has been entered on the FM030. However, currently <b>FEDSTRIP</b> is not being used on purchase requests.

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STEP	ACTION	
	IF...	THEN...
9.	The original description needs to be edited...	<p>a. Double click in the untitled field directly to the right of the word "REVISED".</p> <p>b. Type in any changes.</p> <p>c. Click "OK".</p> <p>Note: If a change has been made, then the DESCR field flag will change from 'N' to 'Y'.</p>
10.	The original quantity needs to be edited...	<p>a. Click on the REVISED QUANTITY field.</p> <p>b. Enter in the new quantity. The REVISED ITEM TOTAL \$ field is calculated based upon changes made to the QUANTITY or UNIT PRICE.</p> <p>Note: Tab through to the MDL level and ensure that the quantity and price at the MDL level reflect the new quantity changes.</p>
11.	The original unit price needs to be edited...	<p>a. Click on the <b>REVISED UNIT PRICE</b> field.</p> <p>b. Enter in the new price. The <b>REVISED ITEM TOTAL \$</b> field is calculated based upon changes made to the <b>QUANTITY</b> or <b>UNIT PRICE</b>.</p> <p>Note: Tab through to the MDL level and ensure that the price at the MDL level reflects the new changes.</p>

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STEP	ACTION	
	IF...	THEN...
<b>12.</b>	The original MDL percentage distribution needs to be edited...	<ul style="list-style-type: none"> <li>a. Click on the <b>REVISED %</b> field.</li> <li>b. Enter in the new percentage.</li> <li>c. Update all MDLs so the sum is 100% for all MDLs. The <b>REVISED MDL TOTAL \$</b> field is calculated based upon changes made to the <b>MDL %</b>.</li> </ul> <p>Note: This field can only be changed if there is more than one MDL per line item. A distribution of 100% cannot be split.</p>

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STEP	ACTION	
	IF...	THEN...
<b>13.</b>	The original MDL quantity distribution needs to be edited...	<p>a. Click on the <b>REVISED QUANTITY</b> field in the MDL block.</p> <p>b. Enter in the new quantity.</p> <p>c. Update all MDLs so the sum is equal to the total quantity of the line item. The <b>REVISED MDL TOTAL \$</b> field is calculated based upon changes made to the <b>MDL QUANTITY</b>.</p> <p>Note: This field can only be changed if there is more than one MDL per line item. A line item cannot be split.</p>
	IF...	THEN...
<b>14.</b>	The original ACCS distribution needs to be edited...	<p>a. Double click in the <b>REVISED ACCS</b> field - the field to the right of the quantity field in the MDL block.</p> <p>b. When the ACCS CLASSIFICATION CODE STRUCTURE (DBA094) screen is called, enter in the new <b>PROJECT, ORGANIZATION, OBJECT CLASS,</b> and <b>USER DEFINED FIELD,</b> or any combination of the above choices.</p>

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STEP	ACTION	
	IF...	THEN...
15.	Multiple changes need to be made (i.e., new unit price, new description, new ACCS, etc.)...	Combine all applicable steps (i.e. any Steps between 9 and 14) to make the necessary changes.
16.	<p>All changes which affect the dollar value of the document will be reflected in the <b>TOTAL \$ REVISED</b> field at the top of the screen. The difference between the <b>TOTAL CURRENT \$</b> and <b>TOTAL \$ REVISED</b> will be shown in the <b>DIFFERENCE</b> field.</p> <p>Note: Verify the <b>DIFFERENCE</b> field accurately reflects the total changes made.</p>	
17.	<p>Note: To navigate between multiple line items, place the cursor in the line item block and arrow up or down to view the next or previous record respectively.</p> <p>Note: To navigate between multiple MDLs, place the cursor in the <b>MDL</b> block and arrow up or down to view the next or previous record respectively.</p>	
18.	<p>After the necessary modifications have been made, in the <b>APPROVED</b> field, click the 'YES' radio button to indicate that the document is complete and that the approval process can begin.</p> <p>Note: Upon each amendment of the purchase request, the modification number will increase sequentially.</p>	

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**3.6 Canceling a Document/Line Item** This procedure describes the steps necessary to cancel either a document or a specific line item by reducing the current quantity to "0".

Note: An amendment made on the FM014 can be used to cancel a line item but not to add or delete a line item.

STEP	ACTION
1.	In the <b>DOC TYPE</b> field, POREQ will default in as the document type.
2.	In the <b>DOC NO</b> field, double click on the field to view the list of requisitions. Select the applicable document number and click "OK".
3.	Click on the <b>REVISED QUANTITY</b> field. Enter in '0'.
4.	Click on the <b>REVISED UNIT PRICE</b> field. Enter in '0'.
5.	Repeat Steps 3 - 4 for each line item that must be canceled. If the entire purchase request must be canceled, repeat Steps 3 - 4 for each line item on the purchase request.
6.	After the necessary modifications have been made, in the <b>APPROVED</b> field, click the 'YES' radio button to indicate that the document is complete and that the approval process can begin.  Note: Upon each amendment of the purchase request, the amendment number will increase sequentially.