ARIZONA
PROCUREMENT PORTAL
QUICK REFERENCE GUIDE

# Change Order - Updating Chart of Accounts

This document is a quick reference for users who need to create a change order to update the chart of accounts in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: https://spo.az.gov/.

Once a PO has been created, users can create change orders to make necessary changes to an original order. Users can update the Chart of Accounts (COA) by removing the allocation % or amount on their original budget line and adding a new allocation line on their new requisition. Once complete, the requisition will only go through the Finance Approver to validate the proper use of budget information.

If a line item has been paid (partial or full) the budget information can NOT be modified. To make a quantity change refer to the Change Order - Removing Items QRG.

Updating Chart of Accounts

1. Log into APP
2. Navigate to the **Procurement** dropdown, and click **Browse Orders**.
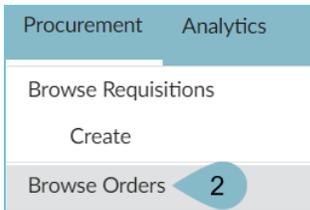
3. Click the **Pencil** [✏️] icon to open the order.
4. To begin a change order, click the **Change Order** button at the top of the page.
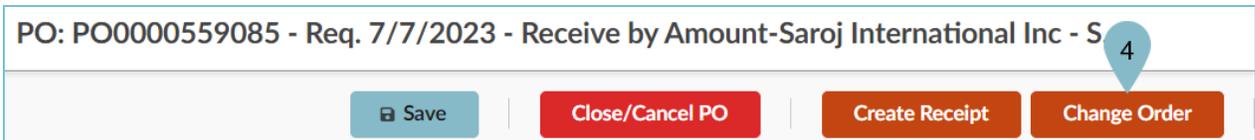
5. On the new requisition, navigate to the **Items & Services** section.
6. Click the **Pencil** [✏️] icon to open the item you would like to update the budget information for.
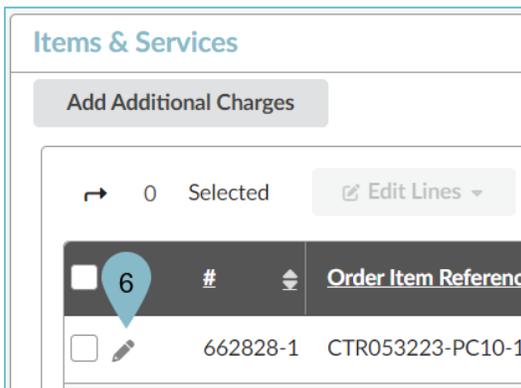
7. Navigate to the **Budget Information** section.
8. In the Allocations section, enter '**0**' in the **%** or **Amount** column for the budget line(s) you will not be moving forward with.
9. To add a new budget line, click the **+Allocation button**.

10. Enter the percent this budget line will cover (usually 100%) in the **%** column or dollar amount in the **Pretax Amount** column for your new budget line.
11. Enter new budget information.
12. Ensure the **Remaining to Allocate** field indicates **0.00**.
13. Click **Save & Close**.

14. Once complete making changes to your requision, click **Submit Requisition**.

> If a line item has been paid (partial or full) the budget information can NOT be modified. For additional information refer to the Change Order Matrix QRG.

> **DO NOT RESET ALLOCATIONS** on a change order, If users reset allocations they will break the PO/AFIS connection. If you see a dialog box asking you to reset allocations, click the 'Cancel' button. Your change order will still process correctly.

Resources

Click the link below for more information on the requisition creation processes in APP:

https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/procure-pay-qrgs-176