ARIZONA
PROCUREMENT PORTAL

Change Order - Updating Chart of Accounts

This document is a quick reference guide 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 <u>NOT</u> be modified. To make a quantity change refer to the Change Order - Removing Items QRG.

Updating Chart of Accounts

1. Navigate to the **Procurement** dropdown, and click **Browse Orders**.
2. Search for the order you would like to conduct a change order on.
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.

   Change Order

5. On the new requisition created, navigate to the **Items** section.
6. Click the **Pencil** icon for the item you would like to update the budget information for.

7. On the popup, navigate and expand the **Budget** section.

> **Budget Information**

8. In the Allocations section, enter **'0'** in the **% or Amount** column for the budget line(s) you will not be moving forward with.
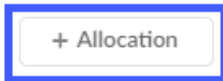

9. To add a new budget line, click the **+Allocation** button.

10. Enter **'100'** in the **%** column or dollar amount in the **Amount** column for your new budget line.
11. Enter your updated Chart of Accounts.

12. Click **Save & Close.**

13. Once complete making changes to your requisitions, click **Submit Requisition**.

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

Note: 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.