

Cancelling or Adding a Line Using a Change Request in myUF Marketplace

Overview

The change order functionality in myUF Marketplace allows users to make changes to POs using the Change Request form. As of October 28, 2019, Procurement no longer processes change orders. Only those with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests. Cancel a line only when the item is not expected and there is no voucher or invoice on that line. You may resend the PO to the supplier to cancel the line or the entire PO (all lines). To close an invoiced PO, click the dropdown at the top right of the PO and select Close.

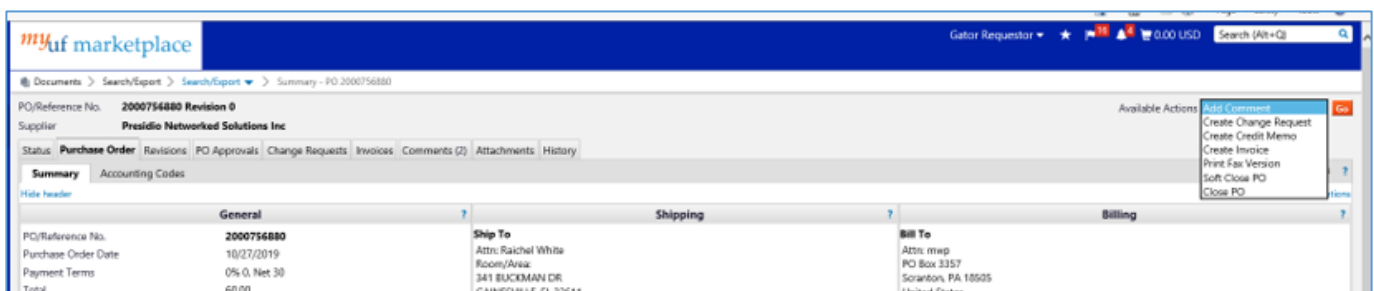
TIPS:

- Before a change request can be submitted, POs need to be Dispatched and Valid in myUFL, and invoices cannot be in process in myUF Marketplace.
 - Before starting a change order, go to Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders to verify the PO.
- Please note that change requests including cancellations cannot be used for Internal Service Providers such as Facilities and UF IT, or for enabled vendors that have punchouts or catalogs. Call the vendor to cancel and close the PO. Look for this symbol to identify suppliers that are enabled:



To start a Change Request on a PO in myUF Marketplace:

1. On the purchase order's screen, click the dropdown menu on the top right, and select **Create Change Request**, then click **Go**. If you need to close the PO instead, click on **Close PO** then **GO**.



2. The Create Change Request form will display. Document the reason for the change and type of change. Select or add anyone that needs to receive an email.

3. Click the **Create Change Request** button to open the form. Changes will not take place until the form is submitted into workflow.
4. In the top section of the form, to resend the PO to the supplier, **click the Edit Section link:**

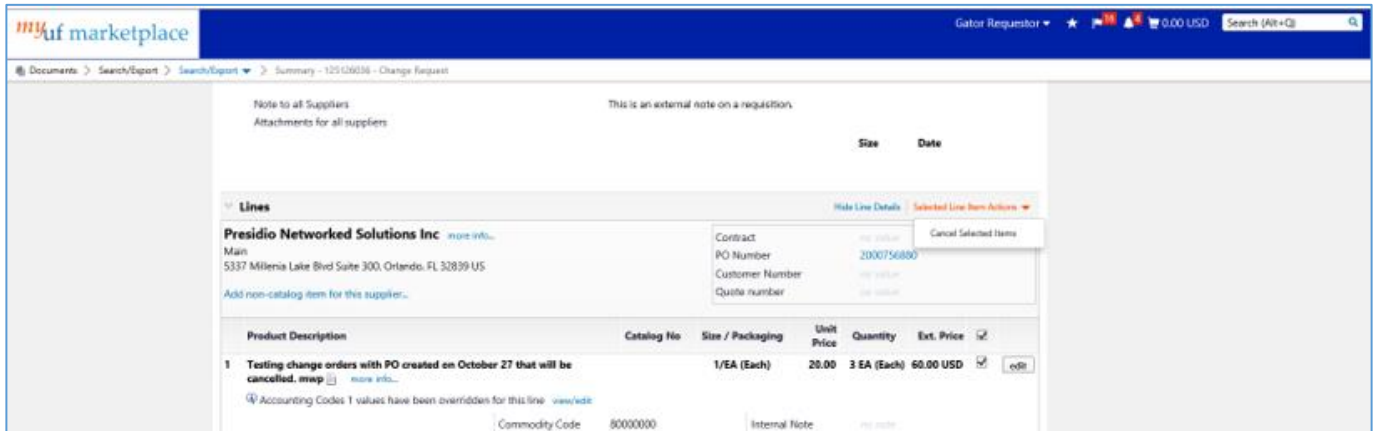
5. Change the **Resend to Supplier** dropdown which will now open from false to true. Click the **Save Changes** button.
 - a. Call the Supplier to let them know a change order or cancellation is on its way. This will not work with punchout or hosted suppliers; please call their Customer Service numbers.

TIP:

- False = Updated PO will not go to suppliers
- True = Updated PO will go to suppliers.

Canceling a Line:

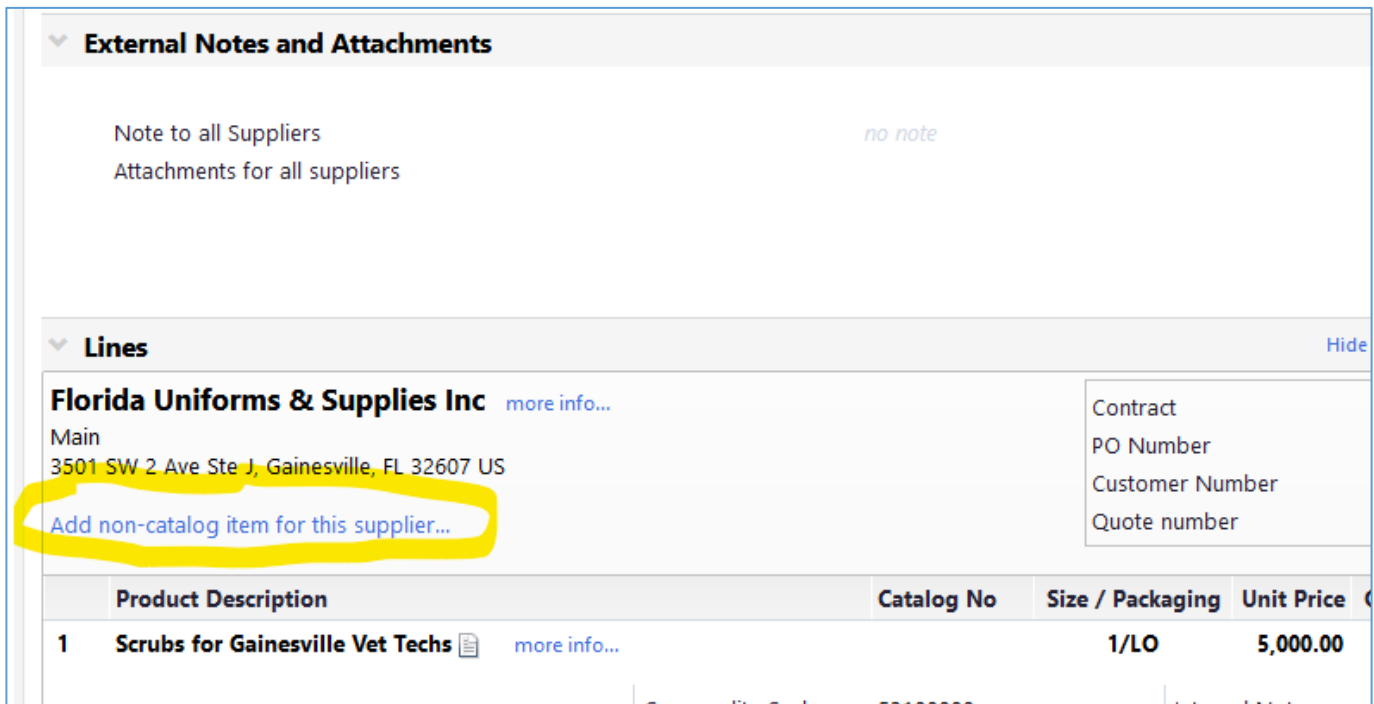
- To cancel a line, scroll down to the line, check the checkbox for the line, then click **Selected Line Item Actions > Cancel Selected Items**.



- Click **Save and then Go** when the changes are made, and then click the Close button. Note: **Do not click Add and Go to Cart** or it will add it to your current cart.

Adding a Line:

- To add a line to a PO, click on **Add a Non-Catalog Item for this Supplier**.



9. Make sure to add the Commodity Code and complete all the fields:

Non Catalog Item

Florida Uniforms & Supplies Inc

Fulfillment Address Main: (preferred)
3501 SW 2 Ave Ste J
Gainesville, FL 32607 US

Description	Catalog No.	Quantity	Price Estimate	UOM
Surgery shoes	K23	2	350.00	EA

241 characters remaining [expand](#) | [clear](#)

Product Details

Commodity Code

[Save](#) [Cancel](#)

10. Even though you are adding a line, check the quantity on the original lines.

- a. Check the **quantity**.
 - i. Quantity will need to be **larger** than the quantity already invoiced.
 - ii. If you find a **negative** quantity and/or amount, please disregard and enter your positive quantity and amount.
 - iii. You may flip the positive quantity and amount if needed, to keep the quantity larger than the quantity invoiced. For example, Quantity = 5000 and Amount = 1

11. To add ChartFields to the new line, click on **ChartFields** in the left-hand menu, then click on the Edit button under Line 2 if the ChartFields will be different from Line 1.

Bill To and PCard	✓
Chartfields	✓
Internal Notes and Attachm...	✓
External Notes and Attach...	✓
Supplier Information	✓
Change Request Approvals	
Comments	
Attachment Overview	1
PO Preview	

Lines Selected Line Item Actions

Florida Uniforms & Supplies Inc
more info...
Main
3501 SW 2 Ave Ste J, Gainesville, FL 32607 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Scrubs for Gainesville Vet Techs more info...		1/LO	5,000.00	1 LO	5,000.00 USD	<input type="checkbox"/>
Accounting Codes 1 (same as header)						edit
2 Surgery shoes more info...	K23	EA	350.00	2 EA	700.00 USD	<input type="checkbox"/>
Accounting Codes 1 (same as header)						edit
Supplier subtotal					5,700.00	USD

Submitting the Change Request Into Workflow:

12. When done, scroll back up to the top and click **Submit Request** or **Assign Draft**.

Submitted change requests will follow the same workflow as the original requisition. Financial approvers need to approve change orders and can refer to the “Approving Change Orders for Financial Approvers” instruction guide. Completed change requests will merge with the PO after workflow and export to myUFL with the updated PO.

Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335