

Completing Change Orders in myUF Market with the Change Request Tab and Closing POs with the PO Dropdown

Overview

The new change order functionality in myUF Marketplace is **different from the old change order form**. This instruction guide will show you **how to make the changes yourself** and update your PO to increase, decrease or cancel a line in your purchase order. Once **you have made the changes in the Change Request form**, submit it and it will follow the same workflow as the original requisition, then merge the new changes into the original purchase order and resend it to myUFL to update the PO. If you are an approver, and need to approve change orders, please refer to the Approving Change Orders for Financial Approvers instruction guide.

Note: Change Requests are no longer needed to close a PO. To close the purchase order, in the PO, click on the PO dropdown in the top right corner and select Close PO then Go. The system will close the PO and resend to myUFL. Please do not close POs that are not already in PeopleSoft, such as POs to UF IT or Facilities, or POs that used a PCard previously. Closed POs get budget checked in myUFL each night to release encumbrances.

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

1. On your 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**.

The screenshot shows the myUF Marketplace interface for a Purchase Order (PO) 2000756880. The top right corner features a dropdown menu with options: 'Add Comment', 'Create Change Request', 'Create Credit Memo', 'Create Invoice', 'Print Fax Version', 'Soft Close PO', and 'Close PO'. The main content area displays the PO details, including the supplier 'Presidio Networked Solutions Inc.', status 'Purchase Order', and various tabs like 'Summary', 'Revisions', 'PO Approvals', 'Change Requests', 'Invoices', 'Comments (2)', 'Attachments', and 'History'.

2. The Create Change Request form will display. Use it to send an email and add a comment documenting the reason for the change. Click the **Create Change Request** button.
3. To resend the PO to the supplier, **click the Edit Section link**:

The screenshot shows the 'Summary' section of the Create Change Request form. It includes a 'Document Actions' dropdown and 'Expand All' / 'Collapse All' links. The 'External Communication Options' section contains three rows: 'Resend to Suppliers on Change Request' (false), 'Resend to ERP System Connections on Change Request' (true), and 'Resend to...' (PeopleSoft Export). An 'Edit Section' link is visible in the top right corner of the section.

4. Change the **Resend to Supplier** dropdown from false to true. Click the **Save Changes** button.
 - a. You may still want to call the Supplier to let them know a change order or cancellation is on its way.
5. **To increase or decrease a line, scroll** all the way down to the bottom and double-click on the form line under Product Description:

Presidio Networked Solutions Inc [more info...](#)
 Main
 5337 Millenia Lake Blvd Suite 300, Orlando, FL 32839 US
[Add non-catalog item for this supplier...](#)

Contract *no value*
 PO Number **2000756880**
 Customer Number *no value*
 Quote number *no value*

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price		
1 Testing change orders with PO created on October 27 that will be cancelled. mwp more info... Accounting Codes 1 values have been overridden for this line view/edit		1/EA (Each)	20.00	3 EA (Each)	60.00 USD	<input type="checkbox"/>	edit

Commodity Code 80000000
 Professional Administrative Performance or Business Services

Internal Note *no note*
 Internal Attachments
[Add Attachments](#)
 External Note *no note*
 Attachments for supplier
[Add Attachments](#)
 Quote *no value*

Supplier subtotal

60.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 60.00
 Total 60.00 USD

6. Once the form is open, you may change the quantity and/or amount. **Click Save and then Go** to save, and then click the Close button. Note: **Do not click Add and Go to Cart** or it will add it to your current cart.
 - a. If you have split distributions, click the [view/edit](#) link to change the amounts in the splits to match the new total on the PO. Otherwise the split amounts will not match the new total.

Accounting Codes 1

Select from your Chartfield String Favorites

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS	Budget Date	Amount of Price	
21030000	179	6100	731100	CRRNT	no	no	no		no	no	no	no	20.00	remove
CFO- PURCHASING SERVICES OTHER MISC DONATIONS GENERAL ADMINISTRATION LAB SUPPLIES														
21030000	159	7700	731100	CRRNT	no	no	no		no	no	no	no	40.00	remove
CFO- PURCHASING SERVICES RCM SUPPORT UNIT FUND AUXILIARY ADMINISTRATION LAB SUPPLIES														
Line subtotal: 60.00 USD Split Total 60.00 USD													add split	
recalculate / validate														

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

- To change ChartFields, click on the **ChartFields** link on the left hand side of the change order form. Click the **Edit** button to make any changes.

Change Requests:
2834622
New PO to test change order issue - CR(1)
Status: **Draft**
Document Total: **20.00 USD**
[View Related Documents](#)
[What's next for my order?](#)

Chartfields

Document Actions History ?

PO Business Unit

2103

CFO-PURCHASING SERVICES

edit

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS	Resource Type	Resource Category	Resource SubCategory	Budget Date
14010000	211	2200	742400	CRRNT	no value	14307100	no value	GRANT	00117058	1	no value	no value	no value	no value	no value
IT-CHIEF INFORMATION OFFICER	C&G - RETURNED OVERHEAD	INDIVIDUAL OR PROJECT RESEARCH	RPR/MAINT-COMPUTER/ELECTRONICS	Current		CNS EQUIPMENT COMP SVC		Sponsored Programs	OR IT SUPPORT	Main					

edit

Lines

Selected Line Item Actions

Publix Super Markets Inc
[more info...](#)

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

myuf marketplace
Gator Requestor
0.00 USD
Search (Alt+Q)

Documents > Search/Export > Search/Export > Summary - 12513638 - Change Request

Note to all Suppliers
Attachments for all suppliers

This is an external note on a requisition

Size

Date

Lines

Hide Line Details

Selected Line Item Actions

Presidio Networked Solutions Inc
Main
5337 Millenia Lake Blvd Suite 300, Orlando, FL 32839-US
Add non-catalog item for this supplier...

Contract
PO Number
Customer Number
Quote number

Cancel Selected Items

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Testing change orders with PO created on October 27 that will be cancelled. map		1/EA (Each)	20.00	3 EA (Each)	60.00 USD

Accounting Codes 1 values have been overridden for this line

Commodity Code 80000000

Internal Note

- When done, scroll back up to the top and click **Submit Request** or **Assign Draft**. Write down the Change Request number to find later.
- To go back to view the original PO for a change request, click on **Related Documents**, then on **View** by the PO number.

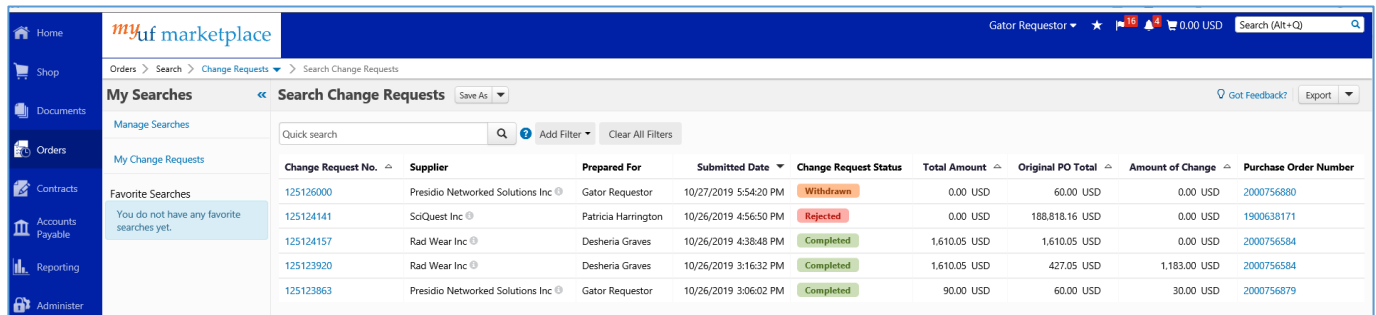
11. Completed change requests merge with the PO and get sent to myUFL.
12. Click on the **History** tab of the PO to view the Merged changes.

PO/Reference No. 2000756879 Revision 1									
Supplier Presidio Networked Solutions Inc									
Status Purchase Order Revisions PO Approvals Change Requests (1) Invoices Comments Attachments History									
Click to filter history ?									
Results Per Page 20 Records found: 38 Page 1 of 2									
Line No	Revision No.	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
2		10/26/2019 3:15 PM	System		Soft Closed				PO automatically soft closed by invoice workflow
Line 1	2	10/26/2019 3:15 PM	System		PO modified	Match status changed	No Matches	Fully Matched	
1		10/26/2019 3:09 PM	System		PO Export sent to external system				The PO was successfully distributed to the ERP system.
1		10/26/2019 3:07 PM	System		PO Approvals completed				
1		10/26/2019 3:07 PM	System		PO Export sent to external system				PO was queued up for submission
1		10/26/2019 3:07 PM	System		PO Revision Finalized				
original		10/26/2019 3:07 PM	Marianne Preisler	Asset Management Approval	PO Approved				
original		10/26/2019 3:07 PM	Marianne Preisler	Asset Management Approval	PO Assigned				
original		10/26/2019 3:07 PM	System		PO placed in workflow after the change request was merged				
Line 1	1	10/26/2019 3:07 PM	System		Change Request merged	Unit Price	30.00	45.00	

To Find Change Orders in the System

13. Go to **Orders > View My Draft Change Requests** to find change requests assigned to you.
14. You may withdraw your change request by going to **Orders > Change Requests**, clicking on the change request number to open, then clicking **Document Actions > Withdraw Change Request**.

15. In your Change Requests lists, your Change Request will show as Withdrawn, Completed or Rejected. To see why it was rejected, open and click the [History](#) link.



Change Request No.	Supplier	Prepared For	Submitted Date	Change Request Status	Total Amount	Original PO Total	Amount of Change	Purchase Order Number
125126000	Presidio Networked Solutions Inc	Gator Requestor	10/27/2019 5:54:20 PM	Withdrawn	0.00 USD	60.00 USD	0.00 USD	2000756880
125124141	SoQuest Inc	Patricia Harrington	10/26/2019 4:56:50 PM	Rejected	0.00 USD	188,818.16 USD	0.00 USD	1900638171
125124157	Rad Wear Inc	Desheria Graves	10/26/2019 4:38:48 PM	Completed	1,610.05 USD	1,610.05 USD	0.00 USD	2000756584
125123920	Rad Wear Inc	Desheria Graves	10/26/2019 3:16:32 PM	Completed	1,610.05 USD	427.05 USD	1,183.00 USD	2000756584
125123863	Presidio Networked Solutions Inc	Gator Requestor	10/26/2019 3:06:02 PM	Completed	90.00 USD	60.00 USD	30.00 USD	2000756879

Please note that change requests cannot be used for Internal Service Providers such as Facilities and UF IT, or for punchouts.

Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335