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.

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

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing change orders with PO created on October 27 that will be cancelled, mwsp</td>
<td>1/EA (Each)</td>
<td>20.00</td>
<td>3 EA (Each)</td>
<td>60.00 USD</td>
<td></td>
</tr>
</tbody>
</table>

   ![Screen shot of PO with details]

   **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

   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.

   **Supplier subtotal** 60.00 USD

   **Subtotal** 60.00 USD
   **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.

   ![Screen shot of PO with details]
7. 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.

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

9. When done, scroll back up to the top and click Submit Request or Assign Draft. Write down the Change Request number to find later.

10. 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.

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.

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