

Changing ChartFields on a PO Using Change Requests 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.

Change requests may be used to change ChartFields on a distribution line, however not if the line has already been vouchered or if the PO is in budget error. Submitted change requests will follow the same workflow as the original requisition, unless there is a new or different Dept ID, in which case it will route to the Financial Approver for that Dept ID. Financial approvers need to approve change orders and can refer to the “Approving Change Orders for Financial Approvers” instruction guide.

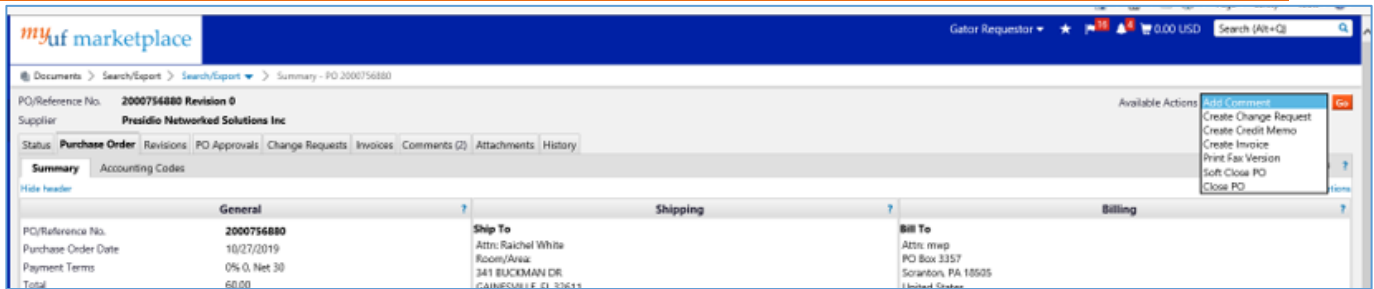
TIPS:

- 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 cannot be used for Internal Service Providers such as Facilities and UF IT, or for enabled vendors that have punchouts or catalogs. 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**.



- 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.

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s):

- Gator Requestor (Prepared by, Prepared for) <mpreis@ufl.edu>
- Marianne Preisler (Approved Requisition) <mpreis@ufl.edu>

[add email recipient...](#)

User with change request permission:

- Cale Batey (Approved) <cale@ufl.edu>
- Carlos Batist (Approved) <cbatist@ichp.ufl.edu>
- Denise Bates (Approved) <ddbates@ufl.edu>
- Gary Barthe (Approved) <gab@ufl.edu>
- Stephanie Bateman (Approved) <sbateman@ufl.edu>

[add email recipient...](#)

Increasing the PO to 25,000 per Henry.

962 characters remaining

Attach file to this change request (optional):

Attachment Type: File

File Name:

File: Browse...

Create Change Request
Close

- Click the **Create Change Request** button to open the form. Changes will not take place until the form is submitted into workflow.
-

Changing ChartFields:

- 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?](#)

Change Requests ▾

- Summary
- Cart Information ✓
- Ship To ✓
- Bill To and PCard ✓
- Chartfields** ✓
- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓
- Supplier Information ✓

Chartfields Document Actions ▾ History ⓘ ?

PO Business Unit

2103
CFO-PURCHASING SERVICES

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 Sponsored Programs	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			OR IT SUPPORT	Main					

▼ **Lines** Selected Line Item Actions ▾

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6. Before you submit, click on Summary, scroll down and open the product description form, and
 - a. Check the **quantity**.
 - i. For either a decrease or increase, the 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

Submitting the Change Request Into Workflow:

7. When done, scroll back up to the top and click **Submit Request** or **Assign Draft**. Completed change requests merge with the PO after requisition and PO workflow and export to myUFL.

Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335