# Increasing or Decreasing a PO Using a Change Order in myUF Marketplace

## Overview

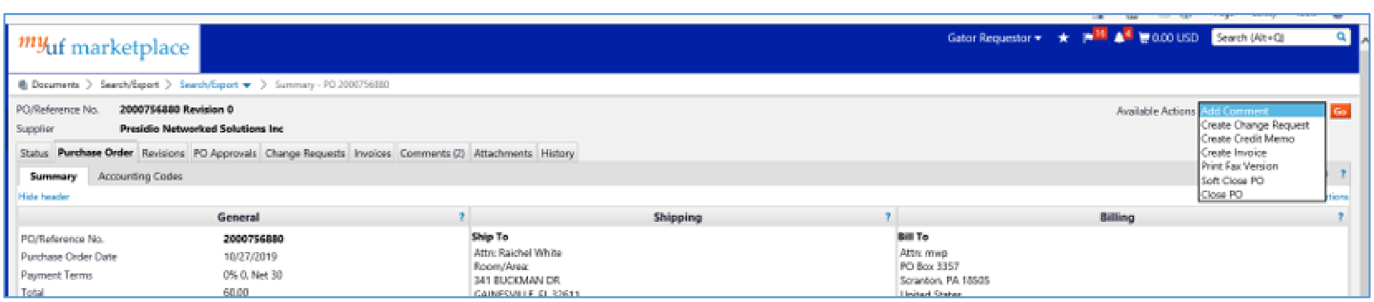
The change order functionality in myUF Marketplace allows users to make changes to POs using the Change Request form. As of October 28, 2019, Procurement no longer processes change orders. Only those with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests.

**TIPS**:

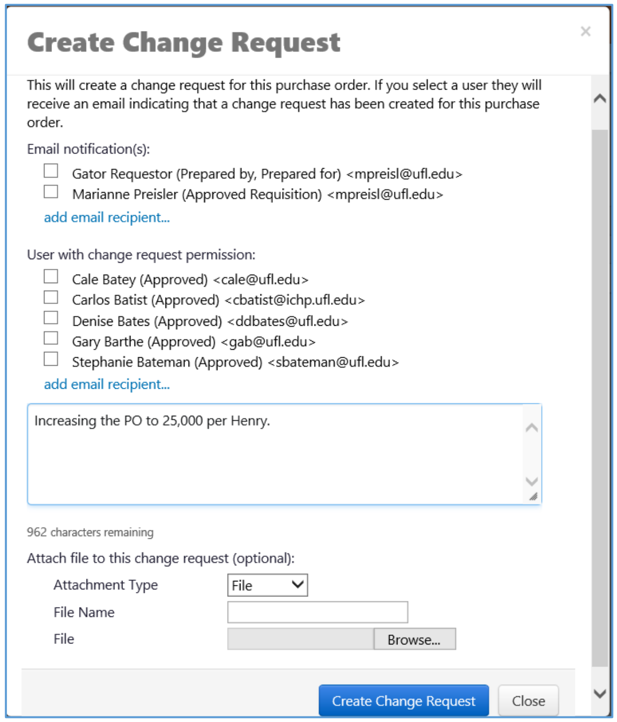
- Before a change request can be submitted, POs need to be Dispatched and Valid in myUFL, and invoices cannot be in process in myUF Marketplace.
    - Before starting a change order, go to **Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders** to verify the PO.
- Before paying the last invoice on a PO, create the increase to the PO **before** you fully pay the PO. Once fully invoiced, a change request won't be available to complete.
- 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.**

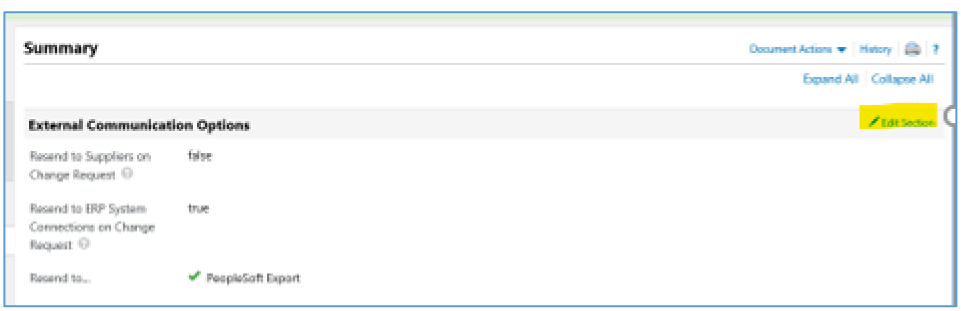



2. The Create Change Request form will display. Document the reason for the change and type of change. Select or add anyone that needs to receive an email.




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:**



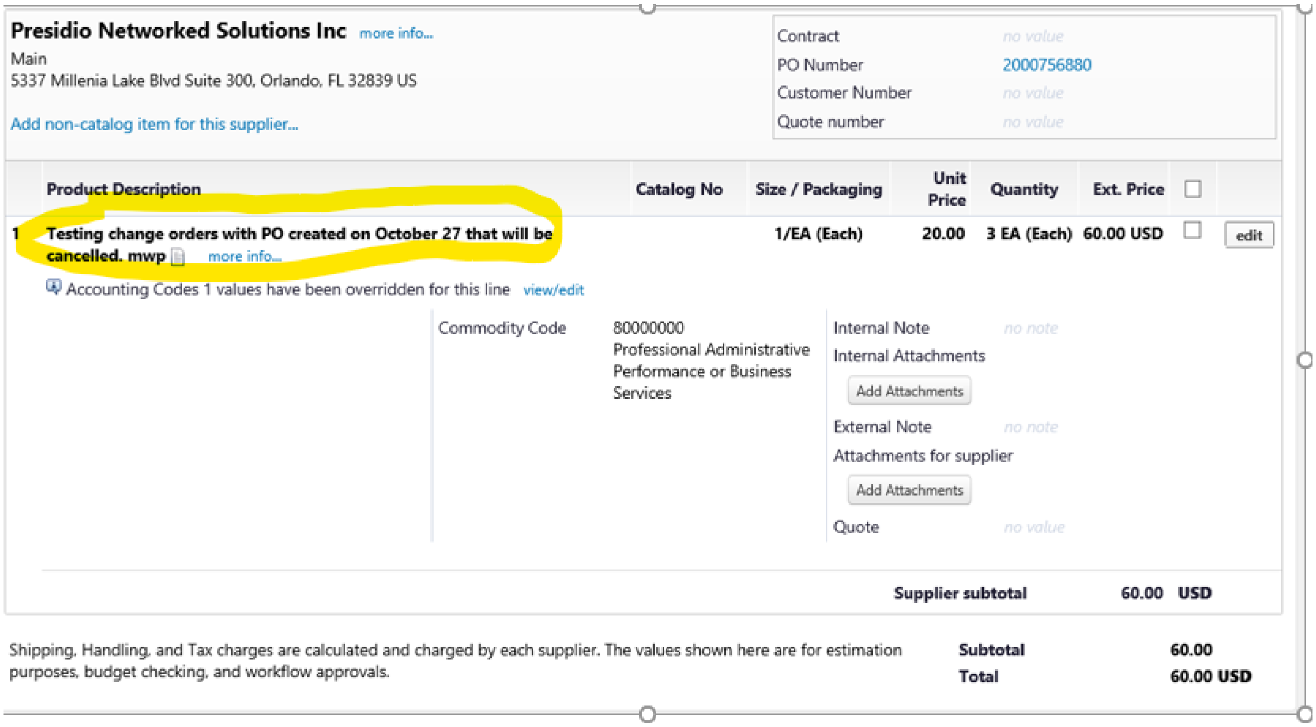

5. Change the **Resend to Supplier** dropdown from false to true. Click the **Save Changes** button.
   a. Call the Supplier to let them know a change order or cancellation is on its way. This will not work with punchout or hosted suppliers; please call their Customer Service numbers for any changes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

**TIP:**

- False = Updated PO will not go to suppliers
- True = Updated PO will go to suppliers. (Do not resend if only changing ChartFields.)

## To Increase or Decrease a line:

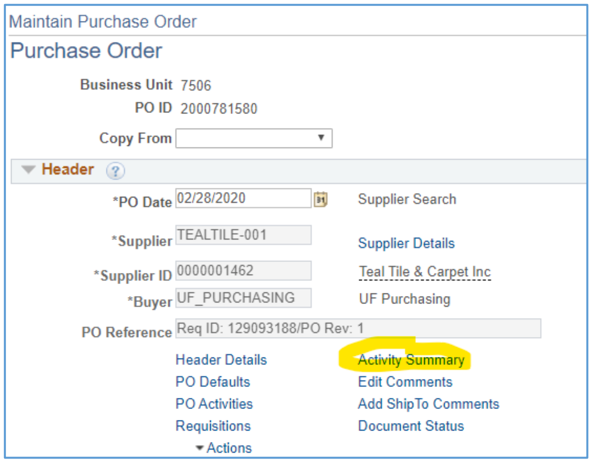
6. **To increase or decrease a line, scroll** all the way down to the bottom and double-click on the line under Product Description:



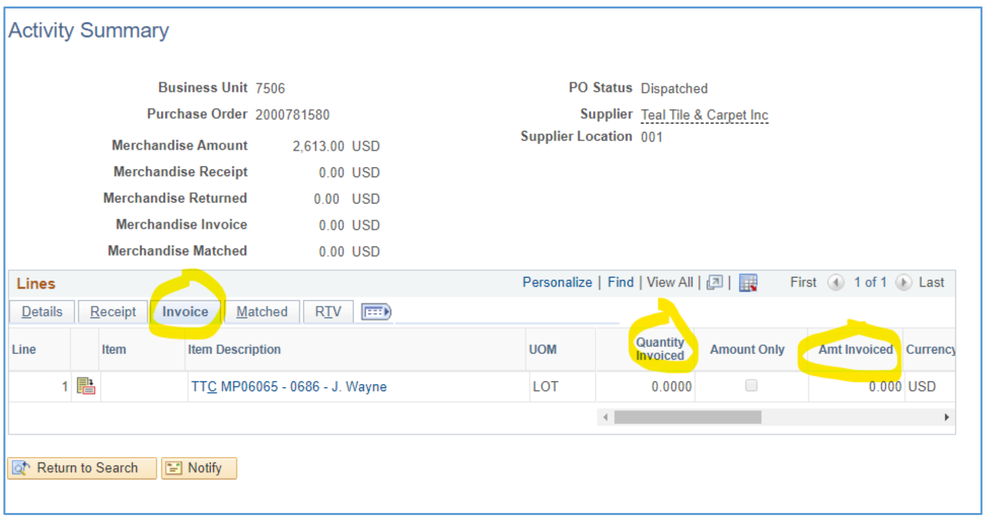

7. Once the form is open, change the quantity and/or amount.
    a. Enter the **new** amount **total** for either a decrease or an increase
        i. A decrease cannot be done for less than the amount already invoiced.
    b. Check the **quantity**.
        i. For either a decrease or increase, the 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

**TIP**

- To check a PO for Invoiced Quantity and Amounts, go to **Financials > Purchasing > Purchase Orders > Review PO Information > Activity Summary.**



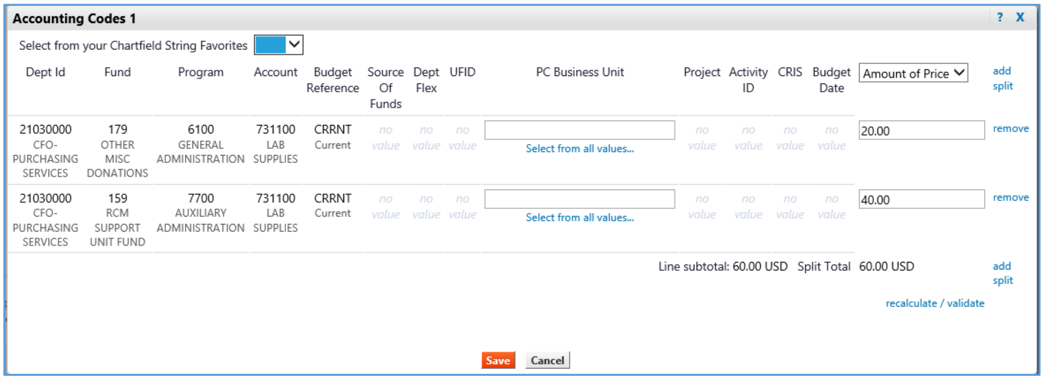

- Click on the Invoice Tab to see **Quantity Invoiced** and **Amt Invoiced**:




- The quantity in a change order needs to be **larger than the quantity invoiced**, for both decreases and increases.

**TIP:**

After making the increase or decrease, check the ChartField split distributions by clicking 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.




8. **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.

## Submitting the Change Request Into Workflow:

9. 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.

   Once workflow is completed, the changes will merge into the original purchase order and resend it to myUFL to update the PO.

## Additional Assistance

myUF Marketplace – Marketplace Help Desk

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