

## 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.

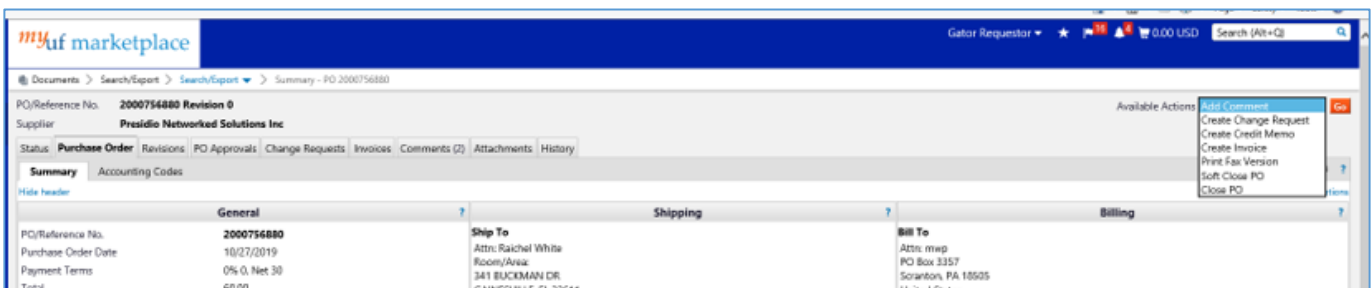
### **TIPS:**

- 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**.



The screenshot shows the myUF Marketplace interface for a Purchase Order (PO) with Reference No. 2000756880. The supplier is Presidio Networked Solutions Inc. The status is 'Purchase Order'. The 'Available Actions' dropdown menu is open, showing options: Add Comment, Create Change Request (highlighted), Create Credit Memo, Create Invoice, Print Fax Version, Soft Close PO, and Close PO. The main content area shows a table with columns for General, Shipping, and Billing. The 'General' column contains PO/Reference No. 2000756880, Purchase Order Date 10/27/2019, Payment Terms 0% 0, Net 30, and Total 60.00. The 'Shipping' column contains Ship To information: Attn: Rachel White, Room/Area 341 BUCKMAN DR, GAINESVILLE, FL 32611. The 'Billing' column contains Bill To information: Attn: rmap, PO Box 3357, Soranton, PA 15505, United States.

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:

**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 <a href="#">more info...</a>		1/EA (Each)	20.00	3 EA (Each)	60.00 USD	<input type="checkbox"/> <a href="#">edit</a>

[Accounting Codes 1 values have been overridden for this line view/edit](#)

Commodity Code	80000000 Professional Administrative Performance or Business Services	Internal Note	no note
		Internal Attachments	
		<a href="#">Add Attachments</a>	
		External Note	no note
		Attachments for supplier	
		<a href="#">Add Attachments</a>	
		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.

<b>Subtotal</b>	<b>60.00</b>
<b>Total</b>	<b>60.00 USD</b>

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**.

Maintain Purchase Order

Purchase Order

Business Unit 7506  
 PO ID 2000781580  
 Copy From [dropdown]

▼ Header ?

\*PO Date 02/28/2020 [calendar icon] Supplier Search  
 \*Supplier TEALTILE-001 Supplier Details  
 \*Supplier ID 0000001462 Teal Tile & Carpet Inc  
 \*Buyer UF\_PURCHASING UF Purchasing  
 PO Reference Req ID: 129093188/PO Rev: 1

Header Details **Activity Summary**  
 PO Defaults Edit Comments  
 PO Activities Add ShipTo Comments  
 Requisitions Document Status  
 ▼ Actions

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

Activity Summary

Business Unit 7506 PO Status Dispatched  
 Purchase Order 2000781580 Supplier Teal Tile & Carpet Inc  
 Supplier Location 001

Merchandise Amount 2,613.00 USD  
 Merchandise Receipt 0.00 USD  
 Merchandise Returned 0.00 USD  
 Merchandise Invoice 0.00 USD  
 Merchandise Matched 0.00 USD

Lines Personalize | Find | View All | [print icon] | [refresh icon] First 1 of 1 Last

Details Receipt **Invoice** Matched RTV [refresh icon]

Line	Item	Item Description	UOM	Quantity Invoiced	Amount Only	Amt Invoiced	Currency
1	[icon]	TTC MP06065 - 0686 - J. Wayne	LOT	0.0000		0.000	USD

Return to Search [icon] Notify [icon]

- 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.

**Accounting Codes 1** ? X

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	add split
21030000	179	6100	731100	CRRNT	no value	no value	no value	<input type="text" value="Select from all values..."/>	no value	no value	no value	no value	<input type="text" value="20.00"/>	remove
CFO-PURCHASING SERVICES	OTHER MISC DONATIONS	GENERAL ADMINISTRATION	LAB SUPPLIES	Current										
21030000	159	7700	731100	CRRNT	no value	no value	no value	<input type="text" value="Select from all values..."/>	no value	no value	no value	no value	<input type="text" value="40.00"/>	remove
CFO-PURCHASING SERVICES	RCM SUPPORT UNIT FUND	AUXILIARY ADMINISTRATION	LAB SUPPLIES	Current										
Line subtotal: 60.00 USD Split Total 60.00 USD												add split		
recalculate / validate														

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

Email: [myUFMarketplace@ufl.edu](mailto:myUFMarketplace@ufl.edu)

Phone: (352) 392-1335