

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.

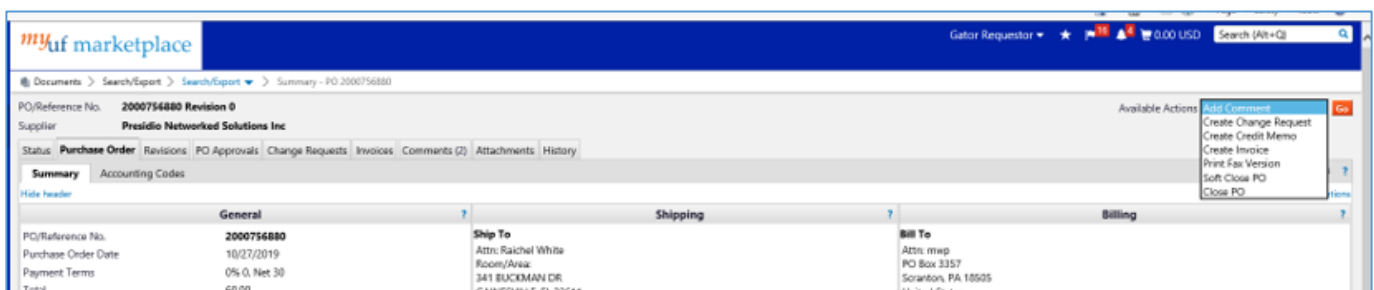
TIPS:

- 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**.



General		Shipping		Billing	
PO/Reference No.	2000756880	Ship To	Attn: Rachel White	Bill To	Attn: mwp
Purchase Order Date	10/27/2019	Room/Area	341 BUCKMAN DR	PO Box 3357	Scranton, PA 18505
Payment Terms	0% 0, Net 30		GAINESVILLE, FL 32611		United States
Total	60.00				

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.

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) <mpreis1@ufl.edu>

☐ Marianne Preisler (Approved Requisition) <mpreis1@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

Create Change Request

Close

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:**

Summary

Document Actions History

Expand All Collapse All

External Communication Options

Resend to Suppliers on Change Request

false

Resend to ERP System Connections on Change Request

true

Resend to...

PeopleSoft Export

Edit Section

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

[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
[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

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 [v]

▼ Header ?

*PO Date 02/28/2020 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
PO Defaults
PO Activities
Requisitions
▼ Actions

Activity Summary
Edit Comments
Add ShipTo Comments
Document Status

- 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 | First 1 of 1 Last

Details Receipt **Invoice** Matched RTV

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

Return to Search Notify

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

- 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:

- 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

Phone: (352) 392-1335