Cancelling or Adding a Line Using a Change Request in myUF Marketplace

Overview
The change order functionality in myUF Marketplace allows users to make changes to POs using the Change Request form. Only those with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests. Cancel a line only when the item is not expected and there is no voucher or invoice on that line. You may resend the PO to the supplier to cancel the line or the entire PO (all lines). To close an invoiced PO, click the dropdown at the top right of the PO and select Close.

**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 including cancellations cannot be used for Internal Service Providers such as Facilities and UF IT, or for enabled vendors that have punchouts or catalogs. Call the vendor to cancel and close the PO. 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 black triangle near the PO number to show the dropdown menu, and select **Create Change Request**. If you need to close the PO instead, click on **Close PO**.
2. The **Create Change Request** form will display. In the **Change Request Reason** box, enter the reason for the change and type of change. Select or add anyone that needs to receive an email.

![Create Change Request Form](image)

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 *External Communication*:

![External Communication Image]

5. Check the *Suppliers on Change Request checkbox* to resend the updated PO to the supplier. Click the *Summary tab* to return to the change request. Leave box blank if not resending.
   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. DO NOT UNCHECK ANY OTHER BOXES.

![Summary Tab Image]
Cancelling a Line:

6. To cancel a line, click the Eyeball icon on the top right to select a view, and select View Line Items Only

7. To cancel the line, check the checkbox of the line, then click the tiny triangle on the top right of the lines and click on Cancel Selected Items when it appears:

Adding a Line:

8. To add a line, click on the three dots on the right above the lines and click on Add Non Catalog Item when it appears:
9. Make sure to add the Commodity Code and complete all the fields, clicking Save when done:

10. Even though you are adding a line, check the quantity on the original lines.
   a. Check the **quantity**.
      i. 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

11. To add ChartFields to the new line or any line, click on the **three dots on the right of the line**, then on **Accounting Codes 1**.
Submitting the Change Request Into Workflow:

12. 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. Completed change requests will merge with the PO after workflow and export to myUFL with the updated PO.

Additional Assistance

<table>
<thead>
<tr>
<th>myUF Marketplace – Marketplace Help Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email: <a href="mailto:myUFMarketplace@ufl.edu">myUFMarketplace@ufl.edu</a></td>
</tr>
<tr>
<td>Phone: (352) 392-1335</td>
</tr>
</tbody>
</table>