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. Only those with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests.
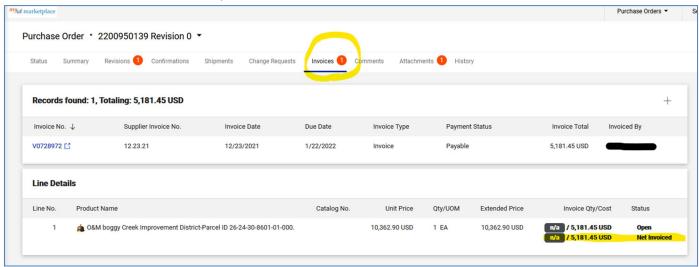
Change requests may be used to change ChartFields on a distribution line or on split distributions if the line has not been vouchered at all.

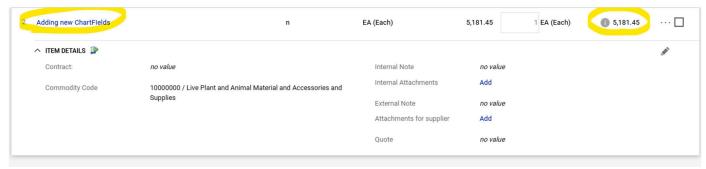**NOTE: ChartFields cannot be changed on a partially or fully vouchered line.**

To pay new invoices on a new ChartField, in the change request:
- **Decrease the first line to the amount invoiced.**
- **Add a new line with the new ChartFIelds for the open amount**

To check if the line is vouchered, click on Invoices then look to see if it is Net Invoiced:

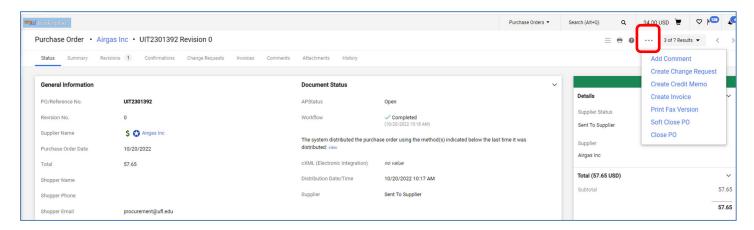**Add a new line for the new ChartFields and make it for the Open Amount.**

Follow the steps below to start a change request.
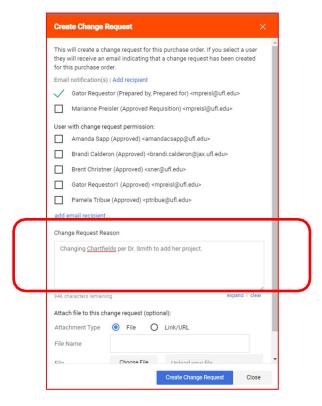
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To start a Change Request on a PO in myUF Marketplace:

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.

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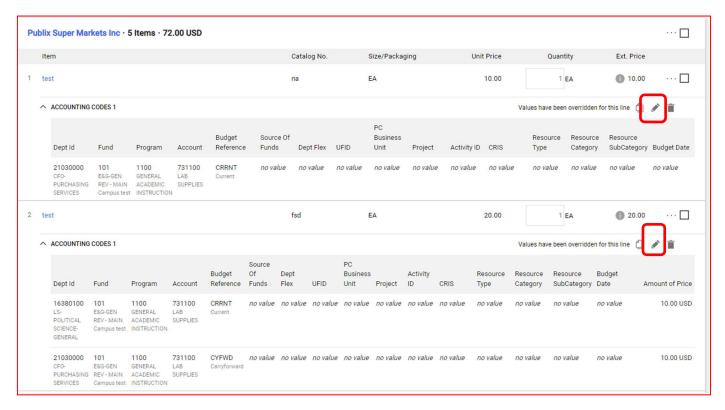
Changing ChartFields:

4. To change ChartFields, **click the Eyeball icon on the top right to select a view, and select View Chartfields Only**
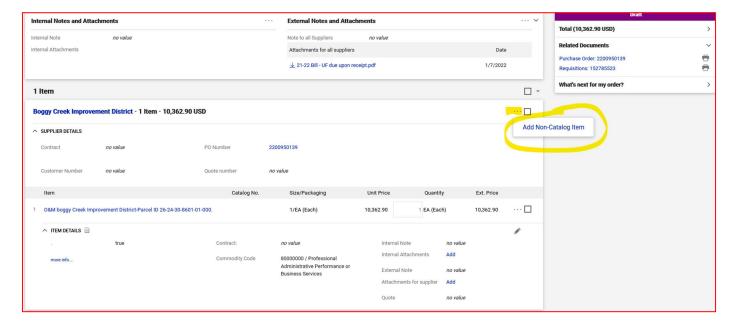

5. From here you can view all the Chartfields for each line. To edit, click the **Pencil icon** above each ChartFields line or split distributions:
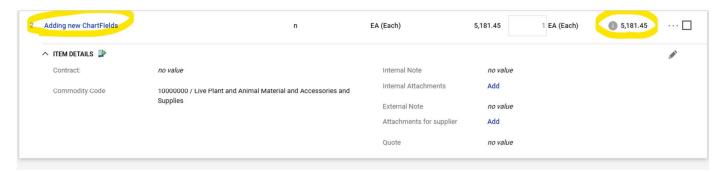
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6. If this line is vouchered and you need to change ChartFields, **add a new line for the new ChartFields** by clicking on the <mark>three dots…</mark> on the right of the first line and selecting **Add a Non Catalog Item:**

7. Make the new line for the open amount and decrease the first line to the invoiced amount:

Submitting the Change Request Into Workflow:

8. 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

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