

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:

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
V0728972	12.23.21	12/23/2021	1/22/2022	Invoice	Payable	5,181.45 USD	[Redacted]

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	O&M boggy Creek Improvement District-Parcel ID 26-24-30-8601-01-000.		10,362.90 USD	1 EA	10,362.90 USD	n/a / 5,181.45 USD	Open
						n/a / 5,181.45 USD	Net Invoiced

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

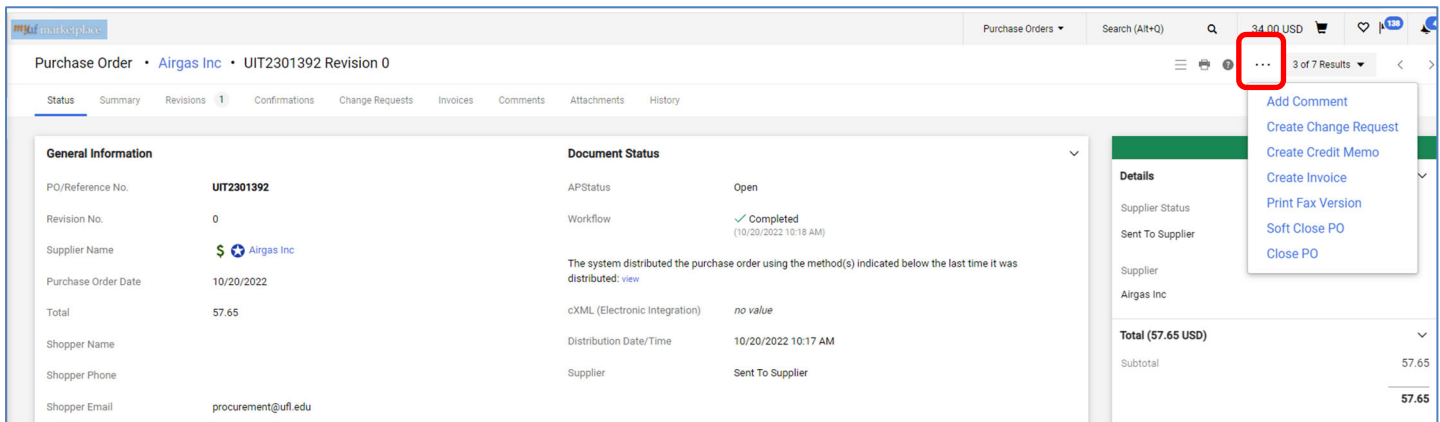
Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
2	Adding new ChartFields		5,181.45	1 EA (Each)	5,181.45		

Contract	Internal Note
no value	no value
Commodity Code	Internal Attachments
10000000 / Live Plant and Animal Material and Accessories and Supplies	Add
External Note	Attachments for supplier
no value	Add
Quote	no value

Follow the steps below to start a change request.

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.

The screenshot shows the 'Create Change Request' form. The 'Change Request Reason' box is highlighted with a red rectangle. The form includes sections for 'Email notification(s)', 'User with change request permission', and 'Attach file to this change request (optional)'. The 'Change Request Reason' box contains the text: 'Changing Chartfields per Dr. Smith to add her project.' The 'Email notification(s)' section has a checked box for 'Gator Requestor (Prepared by, Prepared for) <mpreis1@ufl.edu>' and an unchecked box for 'Marianne Preisler (Approved Requisition) <mpreis1@ufl.edu>'. The 'User with change request permission' section has several unchecked boxes for users like 'Amanda Sapp', 'Brandi Calderon', 'Brent Christner', 'Gator Requestor1', and 'Pamela Tribue'. The 'Attach file to this change request (optional)' section has a radio button selected for 'File' and a text box for 'File Name'.

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:

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



- From here you can view all the Chartfields for each line. To edit, click the **Pencil icon** above each ChartFields line or split distributions:

Publix Super Markets Inc · 5 Items · 72.00 USD

1

test

na

EA

10.00

1 EA

10.00

...

ACCOUNTING CODES 1

Values have been overridden for this line

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS	Resource Type	Resource Category	Resource SubCategory	Budget Date
21030000	101	1100	731100	CRRNT	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
CFO- PURCHASING SERVICES	E&G-GEN REV - MAIN Campus test	GENERAL ACADEMIC INSTRUCTION	LAB SUPPLIES	Current											

2

test

fsd

EA

20.00

1 EA

20.00

...

ACCOUNTING CODES 1

Values have been overridden for this line

Dept Id	Fund	Program	Account	Budget Reference	Source Of Funds	Dept Flex	UFID	PC Business Unit	Project	Activity ID	CRIS	Resource Type	Resource Category	Resource SubCategory	Budget Date	Amount of Price
16380100	101	1100	731100	CRRNT	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	10.00 USD
LS- POLITICAL SCIENCE- GENERAL	E&G-GEN REV - MAIN Campus test	GENERAL ACADEMIC INSTRUCTION	LAB SUPPLIES	Current												
21030000	101	1100	731100	CYFWD	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	10.00 USD
CFO- PURCHASING SERVICES	E&G-GEN REV - MAIN Campus test	GENERAL ACADEMIC INSTRUCTION	LAB SUPPLIES	Carryforward												

- If this line is vouchered and you need to change ChartFields, add a new line for the new ChartFields by clicking on the **three dots...** on the right of the first line and selecting **Add a Non Catalog Item**:

Internal Notes and Attachments

Internal Note: no value

Internal Attachments

External Notes and Attachments

Note to all Suppliers: no value

Attachments for all suppliers

21-22 Bill - UF due upon receipt.pdf 1/7/2022

1 Item

Boggy Creek Improvement District - 1 Item - 10,362.90 USD

SUPPLIER DETAILS

Contract: no value PO Number: 2200950139

Customer Number: no value Quote number: no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 O&M boggy Creek Improvement District-Parcel ID 26-24-30-8601-01-000.		1/EA (Each)	10,362.90	1 EA (Each)	10,362.90

ITEM DETAILS

Contract: no value Internal Note: no value

Commodity Code: 80000000 / Professional Administrative Performance or Business Services Internal Attachments: Add

External Note: no value Attachments for supplier: Add

Quote: no value

Related Documents

Purchase Order: 2200950139

Requisitions: 152785523

What's next for my order?

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

2 Adding new ChartFields

n EA (Each) 5,181.45 1 EA (Each) 5,181.45

ITEM DETAILS

Contract: no value Internal Note: no value

Commodity Code: 10000000 / Live Plant and Animal Material and Accessories and Supplies Internal Attachments: Add

External Note: no value Attachments for supplier: Add

Quote: no value

Submitting the Change Request Into Workflow:

- 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