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. Onlythose with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests.

► <u>TIPS</u>:

- 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.

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- 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 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.

3

| | UIT1902879 Revision 2 | <u> </u> | | | | | | |
|---------------------|----------------------------|------------------------------------|-------|----------|------------|-------------|-------------------------------------|------------|
| Status Summary | Revisions (3) Confirmation | Add Comment | s 3 | Invoices | Comments 3 | Attachments | History | |
| | | Create Change Request | | | | | | |
| General | | Create Credit Memo | | | | | Billing | |
| PO/Reference No. | UIT1902879 | Create Invoice | | | | | Bill To | |
| Purchase Order Date | 11/5/2021 | Print Fax Version Soft Close PO | estor | | | | Univ of Florida Acco | unts Payab |
| Payment Terms | 0% 0, Net 10 | Close PO | 32611 | | | | Scranton, PA 18505 United States | |
| Total | 42.00 | United States | | | | | | |
| Requisition Number | 3391191 view print | | | | | | Other Information | |
| Priority | Normal | Delivery Option | ons | | | | Sole Source | × |

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 × | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|
| 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) Add recipient | | | | | | | | | |
| Gator Requestor (Prepared by, Prepared for) <mpreisl@ufl.edu></mpreisl@ufl.edu> | | | | | | | | | |
| Marianne Preisler (Approved Requisition) <mpreisl@ufl.edu></mpreisl@ufl.edu> | | | | | | | | | |
| User with change request permission: | | | | | | | | | |
| Amanda Sapp (Approved) <amandacsapp@ufl.edu></amandacsapp@ufl.edu> | | | | | | | | | |
| Brandi Calderon (Approved) <brandi.calderon@jax.ufl.edu></brandi.calderon@jax.ufl.edu> | | | | | | | | | |
| Brent Christner (Approved) <xner@ufl.edu></xner@ufl.edu> | | | | | | | | | |
| Gator Requestor1 (Approved) <mpreisl@ufl.edu></mpreisl@ufl.edu> | | | | | | | | | |
| Pamela Tribue (Approved) <ptribue@ufl.edu></ptribue@ufl.edu> | | | | | | | | | |
| add email recipient | | | | | | | | | |
| Change Request Reason | | | | | | | | | |
| Need an increase to pay another invoice. | | | | | | | | | |
| | | | | | | | | | |
| 960 characters remaining expand clear | | | | | | | | | |
| Attach file to this change request (optional): | | | | | | | | | |
| Attachment Type 💿 File 🔘 Link/URL | | | | | | | | | |
| File Name | | | | | | | | | |
| | | | | | | | | | |
| Eila Choose File Unload your 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 External Communication:

| Change Re | Change Requests • 3399513 ▼ | | | | | | | | | |
|-----------|-----------------------------|------------------------|------------|-------------|---------|--|--|--|--|--|
| Summary | PO Preview | External Communication | Comments 1 | Attachments | History | | | | | |
| | | | | | | | | | | |
| () Change | s will not be sent | to the Supplier. | | | | | | | | |
| Change Re | Change Request Reason | | | | | | | | | |

- 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 the 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.

| (| Change Requests • 3399513 • | | | | | | | | | |
|---|-----------------------------|------------------|-------------------------|------------|-------------|---------|--|--|--|--|
| | Summary | PO Preview | External Communication | Comments 1 | Attachments | History | | | | |
| | | | | | | | | | | |
| | Resend | to | | | | | | | | |
| | 🗸 su | pliers on Change | Request | | | | | | | |
| | | System Connect | tions on Change Request | | | | | | | |
| | ~ | PeopleSoft Exp | port | | | | | | | |



To Increase or Decrease a line:

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

| imarkstplace | Purchase Orders 👻 Search (All+O) O O O USD 📜 💝 🏴 🖉 |
|---|--|
| Change Requests • 3399513 • | 📃 👁 🖶 🕢 Assign Drat Submit Request |
| Summary PO Preview External Communication Comments () Attachments History | Filter View |
| | View All |
| Changes will be sent to the Supplier. | View Line Items Only |
| | View Ship To Only Total |
| Change Request Reason | View Bill To Only |
| | Subte View Chartneids Only 42.00 |

7. Double click on any **line ITEM** to open the form and change quantity or amount:

| Change Requests | • 3399513 - | | | | | | | |
|-----------------------|------------------------------|------------|---------------------|----------------|------------|-------------|------------|--------|
| Summary PO Previe | ew External Communication | Comments 1 | Attachments History | | | | | |
| 1 Changes will be ser | t to the Supplier. | | | | | | | |
| 3 Items | | | | | | | | · · |
| Publix Super Mark | tets Inc · 3 Items · 42.00 U | ISD | | | | | | … 🗆 |
| Item | | | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
| 1 test | | | na | EA | 10.00 | 1 EA | 10.00 | … 🗆 |
| 2 test | | | fsd | EA | 20.00 | 1 EA | 20.00 | ···· 🗆 |
| 3 Adding a line | J | | na | EA | 12.00 | 1 EA | 12.00 | … 🗆 |

8. Change quantity and/or amount in the opened form, then click on SAVE.

| Edit Non-Catalog Item | | | | | | | × |
|---|--|-----------------------|-------|-----|---|------|-------|
| Publix Super Markets Inc | | | | | | | |
| Fulfillment Address | | | | | | | ~ |
| Main 👷 - PO Box 32009, Custome | er Charge, Lakeland, Florida 338 | 02-2009 United States | | | | | |
| Item | | \frown | | | | | ~ |
| Description * | Catalog No. | Quantity ★ | Price | UOM | | | |
| test | fsd | 1 | 20.00 | EA | • | | |
| 250 characters remaining Additional Details | | | | | | | ~ |
| Commodity Code 800000 Profession | 2000 Q al Administrative Performance or Bus | iness Services | | | | | |
| * Required fields | | | | | | Save | Close |

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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: <u>myUFMarketplace@ufl.edu</u>

Phone: (352) 392-1335