CREATING & PROCESSING a PO Change Request

FOR REQUESTERS & DEPARTMENT PURCHASING SPECIALISTS ONLY

Revised 6/6/2023

For the Shopper Role, please refer to:

“Requesting a PO Change Request”
Who Can Create a Change Request?

Change Requests can be *created and submitted* by a Requester or Department Purchasing Specialist (DPS).

- A Requester or DPS can create change requests for POs **within their department access**.
  - Default access (visibility) in UDX is determined by employees’ HR department.
  - If a Requester or DPS needs expanded department access because they support employees in other departments, a DPS can submit the UDX Access Request form for an Access Update.
  - The request can be for themselves or for another system user and will need to include the department IDs needed.

- A Requester or DPS can create change requests for their own orders and can also create them **on behalf of Shoppers**.
  - When a Shopper “creates” a change request on their Purchase Order, they must select an employee with a Requester or DPS role as a comment recipient.
  - The Requester or DPS the Shopper selects will be notified via e-mail.
  - The Shopper’s requested changes will also be documented in the Comments tab of the PO.
The five basic rules of change requests are as follows:

1. You can only create a change request on an open, completed purchase order.
2. Only one change request can be in process for any PO at a time.
3. Change requests go through the same workflow as requisitions. If dollar amounts have been adjusted, the approval workflow will be adjusted for cumulative total dollar amount.
4. You cannot change a line that’s been fully invoiced and vouchered.
5. Always check for the account code since UDX will let you submit a change request without one.

Note: Change Requests should NOT be initiated for the following: Closing or Canceling entire POs, making changes to Catalog Orders.
Change Requests for Non-Catalog Orders

All Change Requests begin the same way, as shown in slides 4-9.

**Common Reasons** for Change Requests are covered in this guide:

- Adding Lines to a PO (see slide 10)
- Cancelling PO Lines (see slide 17)
- Changing Quantities on a Line (see slide 23)
- Changing Prices on a Line (see slide 30)
- Monitoring Your Change Requests (see slide 37)
- Additionally, guidance is provided for situations where changes need to be made for catalog orders where change requests are not used (see slide 41)

The **Advanced Change Request Guide** covers:

- Changing Funding on a Vouchered PO
- Zero Dollar Lines
- Form Based POs: Subawards, legacy Waiver of Bids, NPOPs
To Create a Change Request in a PO:
Click the **Change Requests** tab.
Click ‘+’ sign.
You may also click the ellipsis on the PO and select **Create Change Request** from the menu.
In the Create Change Request Window:
Select any Recipients from boxes or…
Use the link to Add Recipients
Type the Change Request Reason.
Attach a document if necessary.
Click Create Change Request.
Note the default setting in UDX is to NOT send PO changes to the supplier. If the supplier SHOULD receive the revised PO, click the **External Communication** tab.
Options on the External Communications Tab:

Resend to Suppliers on Change Request

- Defaults to False (Unchecked)
- **Set to True (Checked)** for anything the supplier needs to receive (updated quote, changes to quantity or price, etc.)
- You do not need to check this box if your request is only making accounting changes

Resend to ERP Connections on Change Request/POExport

- Defaults to True
- Sends all updates to PeopleSoft
- No need ever to set to False; PeopleSoft will automatically pick up changes
Check the **Suppliers on Change Request** box to send the revision to the supplier. Do not uncheck the other two boxes.
Changes for Non-Catalog Orders

Adding Lines

(first follow slides 4 through 9)
After selecting the External Communications options, return to the Summary tab:

Scroll down to the Items section.

Click the ellipses and select Add Non-Catalog Item.
Complete **Add Non-Catalog Item** window with these details:

1. Description
2. Supplier Item Number (if available)
3. Quantity
4. Price
5. Packaging
6. Commodity Code
7. Select **Save** to move on or **Save and Add Another** to create more lines and repeat the steps above.
The new line item(s) will now be visible. Click the **Pencil** to edit the additional line details.
Add an **External Note** to alert the vendor.

Add the **Account Code** if not defaulted.

Click **Save**.
Click Submit Request.
Approvers will see the new line highlighted.
Changes for Non-Catalog Orders

Cancelling Lines

(first follow slides 4 through 9)
Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier.

<table>
<thead>
<tr>
<th>Change Request Reason</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason</td>
<td>Remove the service charge</td>
</tr>
</tbody>
</table>
Scroll down to the **Line Items** section
Select the **Checkbox** next to the line(s) to cancel
Select the **Selected Line Item Actions** menu and click **Cancel Selected Items**.
Enter the reason for the cancellation and click OK.
Click Submit Request.

Note the cancelled item has an icon indicating it was cancelled.
Approvers will see the cancellation icon on the relevant line.
Changes for Non-Catalog Orders

Changing Quantities

(first follow slides 4 through 9)
Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier (if needed).
Scroll down to the **Line Items** section
On the item you wish to change, click in the **Quantity** box and type in the new quantity.
When you move out of the box it will automatically be saved.
After the new Quantity is saved:
The new **Extended Price** will be updated.
Click the **pencil** on the line to add notes if needed.
Enter comments as needed. Click Save.
Click Submit Request.
Approvers will see the new quantity highlighted.
Changes for Non-Catalog Orders

Changing Prices

(first follow slides 4 through 9)
Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier (if needed).
Scroll down to the **Line Items** section and click on the blue **item name link** to make changes.
In the Non-Catalog Item window:
Update **Description** if needed.
Change the **Price** to the new amount.
Select **Save**.
You will see the new price reflected on the line item.

This should be the new **total** amount, not an **additional** amount.
Click the pencil next to the line item to edit the line **item details** and Add an **External Note** if desired.

Click **Save**.
Select **Add** next to **Attachments for supplier** to attach any necessary document(s). Click **Submit Request**.
Approvers will see the new amount highlighted.
Monitoring Your Change Requests

• The Requester will be able to see the Change Request status in the Change Request tab of the Purchase Order (illustrated in the next slide).

• A revised PO will be generated after going through the workflow for approval.
The Change Requests tab of the PO lists all change requests. The Status of the Change Request is updated as it moves through workflow.
Your submitted change requests can be accessed from **Orders>My Orders>My Change Requests.**

If a change request has been left in draft or has been returned to you, it can be accessed from **Orders>My Orders>Draft Change requests.**
Change requests returned to you can also be viewed in your Draft Carts marked with a “CR”
Changes for Catalog Orders

If a change needs to be made to a catalog PO, please contact the supplier directly!
UDX Catalog orders are submitted electronically directly into the supplier’s eCommerce system for fulfillment, BUT UDX change requests are sent via email and may not be reviewed by the supplier until AFTER the order is completely fulfilled!

- If replacements or additional items are needed, please create a new order.
- Contacting the supplier is best to cancel a line or update a minor detail on shipping address (e.g., room number).
- Suppliers may not be able to make all changes.
- Comments can be added to POs for internal documentation and tracking.

This process is the same for any user role: Shopper, Requester, or DPS
To add a comment to a PO:
Click the **Comments** tab.
Click on ‘+’ sign.
Manually add “Procurement Help” as a recipient by entering “Help” in the last name field of the user search box. Only contact Procurement Help if you require administrative action regarding this PO, such as a closure or line cancellation. Attach the confirmation you received from the supplier after contacting them.

Adding Comments:
Select the Recipients by checking boxes
Add Recipients with the link, if necessary
Type your Comment
Attach a file, if necessary
Select ‘✔’ to add Comment
To view comments in a PO:
Select the **Comments** tab.
Comments are listed newest to oldest.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Understanding Access in UD Exchange
• Completing the Access Request Form
• Advanced Change Requests
• Closing and Cancelling POs
• Finding Suppliers and Supplier Information in UD Exchange