Creating and Processing a PO Change Request

FOR REQUESTER/DPS roles only

Shoppers, please refer to “Requesting a PO Change Request”
What’s different in UD Exchange?

**Method of Change**
- In Webforms, the PO Amendment was used for any order
- In UD Exchange, there are different options depending on catalog and non-catalog orders

**Who can request**
- In Webforms, anyone with access to the PO could submit a change order.
- In UD Exchange, shoppers can request a change. Requesters and Department Purchasing Specialists can submit a change request.
Changes for Catalog Orders

Catalog orders are submitted electronically directly into the supplier’s eCommerce system for fulfillment. However, change orders are sent via email and may not be reviewed until after the order is completely fulfilled.

• If a change is needed after the order is sent, contact the supplier directly
• Comments can be created in orders for tracking purposes
• **Suppliers cannot make all changes.** If increases, replacements, or additional items are needed, create a new order. Contacting the supplier is best to cancel a line or update a minor detail on shipping address (room number, etc.).

This process is the same for any user – Shopper, Requester, or Department Purchasing Specialist.
To add a comment to a PO:
1. Click the **Comments** tab
2. Click on ‘+’ sign
Adding Comments
1. Select the Recipients by checking boxes
2. Add Recipients with the link, if necessary
3. Type your Comment
4. Attach a file, if necessary
5. Select ‘✔’ to add Comment

Manually add “Procurement Help” by searching on user “procurement” if you require administrative action regarding this PO, such as a closure or line cancellation.
To view comments in a PO:
1. Select the Comments tab
2. Comments are listed newest to oldest
Changes for Non-Catalog Orders

• Non-Catalog Orders are more flexible and can be modified in several ways by a Requester or Department Purchasing Specialist.

• The most common change orders will be for:
  – Adding Lines (see slide 13)
  – Cancelling Lines (see slide 19)
  – Changing Quantities (see slide 25)
  – Changing Prices (see slide 32)

• A change may be initiated by a Shopper’s request via e-mail, which will appear in the Comments section of the Purchase Order

• These change orders all begin the same way, as shown in slides 7-12.
To Create a Change Request in a PO:
1. Click **Change Requests**
2. Click ‘+’ sign
You may also choose “Create Change Request” from the dropdown next to the purchase order.
Change Request Reason will be required. Click on that link or the pencil icon next to Change Request Reason to summarize the reason for the change request.
Note the default setting is NOT to send changes to the supplier. If the supplier should receive the revised PO, edit this by clicking on **External Communication**.
External Communications Options

Resend to Suppliers on Change Request
- Defaults to False
- Not needed for accounting changes
- Set to True for anything the supplier needs to receive (updated quote, changes to quantity or price, etc.)

Resend to ERP Connections on Change Request
- 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 in the Resend To menu to send the revision to the supplier. Do not uncheck the other two boxes.
Changes for Non-Catalog Orders

Adding Lines

(first follow slides 7 through 12)
After selecting the External Communications Options
1. Scroll down to the **Items** section
2. Click the ellipses (…) and select **Add Non-Catalog Item**
Complete the pop-up window with these details:
1. Description
2. Supplier Item Number (if available)
3. Quantity
4. Price
5. Packaging
6. Commodity Code
7. Select either 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
1. Select **Edit (Pencil Sign)** next to the new line item to edit the details.
2. Add an **External Note** to alert the vendor
3. Add the **Account Code** if not defaulted.
4. Click **Save**.
At the top of the page, click **Submit Request.**
Approvers will see the new line highlighted.
Changes for Non-Catalog Orders

Cancelling Lines

(first follow slides 7 through 12)
Following the steps in slides 7-12, include your reason and be sure that the change is being sent to the supplier.
Clicking the eyeball lets you see and review only certain things on your screen.

1. Scroll down to the **Items** section
2. Select the **Checkbox** next to the line(s) to cancel
3. Select the dropdown and click **Cancel Selected Items** from the **Selected Line Item Actions**
Enter the reason for the cancellation and click OK.
Scroll up to the top of the page and 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 7 through 12)
Following the steps in slides 7-12, include your reason and be sure that the change is being sent to the supplier (if needed).
Scroll down to the **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.

Clicking the eyeball lets you see and review only certain things on your screen.
After saving the Quantity change
1. The new **Extended Price** will be updated
2. Click the pencil icon on the line to add notes if desired
1. Enter comments as needed
2. Click Save
Scroll up to the top of the page

1. Select **Submit Request**
Approvers will see the new quantity highlighted.
Changes for Non-Catalog Orders

Changing Prices

(first follow slides 7 through 12)
Following the steps in slides 7-12, include your reason and be sure that the change is being sent to the supplier (if needed).
Scroll down to the **Lines** section and click on blue Item name link to make changes.
After opening the Non-Catalog Item dialog box:
1. Update **Description** if needed
2. Change the **Price** to the new amount
3. Select **Save**

This should be the new **total** amount, not an **additional** amount. This is different from webforms.
The new Price will now be visible
1. Click the pencil icon to edit the updated line item to **Add an External Note** if desired
2. Click **Save**
3. Select **Add** next to **Attachments for supplier** to attach any necessary document(s)
Scroll up to the top of the page and click **Submit Request**
Approvers will see the new amount highlighted.
Changes for Non-Catalog Orders

- A revised PO will be generated after going through the workflow for approval.
- 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).
The **Change Requests** tab lists all change requests. The **Status** of the Change Request is updated as it moves through the workflow.
1. All your submitted change requests can be accessed from Orders>My Orders>My Change Requests.
2. 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 Carts marked with a “CR”
Funding Changes for Invoiced Orders

- Care must be taken for orders that are partially invoiced as changes cannot be made to those lines.
- When a purchase order is fully invoiced, no changes may be made. This includes all N-POPs which are invoiced upon approval (beginning with UDP).
- For more information, please see the Advanced Change Requests guide.
Remember!

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 reqs, but for the cumulative total dollar amount
4. You cannot change a line that’s been fully invoiced
5. Always check for the account code since it will let you submit without one.
Resources

Procurement Services
procurement@udel.edu

See also the ConnectingU sessions on Basic Change Requests (Requester module) and Advanced Change Requests (DPS module)