Requesting a PO Change Request

FOR SHOPPER Roles only
Requesters/Department Purchasing Specialists, please refer to
“Creating and Processing 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 to their own POs. Requesters and Department Purchasing Specialists can submit a change order.
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 after a shopper makes the Change Request.

• Shoppers must make the change request in a comment for others to create. Be as detailed as possible and provide any attachments.

• The comment should be sent at least to the Requester (“Prepared By” user) of the PO so that the change order can be created.
To Create a Change Request in a PO:
Select **Change Order Request** from the Purchase Order pull-down menu.
Adding Change Request Comments:
1. Select the **Recipients** by checking boxes.
2. **Add Recipients** with the link, if necessary.
3. Type your **Request detail**.
4. Scroll down and attach a document if necessary.
5. Select **Send Comment**.
Changes for Non-Catalog Orders

• The request will be sent to the selected Requester for processing and a revised PO will be generated after going through the workflow for approval.
• The Shopper will be able to see the Change Request appear in the Comments tab of the Purchase Order once the Requester drafts the Change Request.
• The Shopper will receive notification when the Change Request is complete.
• Shoppers can request a change to their own POs. Requesters and Department Purchasing Specialists can request or create changes to any PO within their access.
Limits to Change Requests

- Once a PO line has been fully vouchered, it cannot be changed. Additionally, a fully vouchered PO cannot be changed in any way, including adding lines.
- Only one change request can be in workflow at a time.
- If you do not see the “Create Change Request” option, check the Change Requests and Vouchers tabs to ensure that these restrictions do not apply.
Resources

Procurement Services
procurement@udel.edu

See also: “Creating and Processing a PO Change Request”