



REQUESTING a PO Change Request
FOR SHOPPERS ONLY

Revised 6/6/2023

Requesters/Department Purchasing Specialists, please refer to
[“Creating and Processing a PO Change Request”](#)



Who Can Create a Change Request?

Shoppers can *request* a change to their own POs.

- When a Shopper “creates” a change request on their Purchase Order, they must select an employee with a Requester or Department Purchasing Specialist role as the comment recipient.
 - The Requester or DPS the Shopper selects to create and submit the change request for them will be notified via e-mail.
 - The change request can then be created and submitted by the Requester or DPS.



Change Request Restrictions

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.
- Always check the Vouchers tab and scroll down to the line items area to confirm that the lines you are trying to change have not been fully vouchered.

Only one change request can be in workflow at a time. If the Change Requests tab indicates a change request is “pending” you will not be able to create a new one.

If you do **not** see the “+” sign on the Change Requests tab or do not see “Create Change Request” as an option when you click the ellipsis on your PO, check the Change Requests and Vouchers tabs to ensure that these restrictions do not apply.



Changes for *Non-Catalog Orders*

- Non-Catalog Orders can be modified in several ways by a Requester or DPS when a Shopper makes the Change Request
- Shoppers must state the details of the change request in a comment for a Requester or DPS to complete and submit. 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 completed.



Records found: 4

Status
Completed
Completed
Completed
Completed

Note: Only one change request can be in process at a time. If previous change requests are "completed", you may create a new one. If you see a change request that is "pending" on your PO, you will not be able to create a new one.

Created
8/14/2020
8/14/2020
8/14/2020
9/1/2020



You can also click the ellipsis on the PO and select "create change request" from the menu.

To Create a Change Request in a PO:
On the **Change Requests** tab, click the "+" sign to create the request.

Total (17,010.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	17,010.00
	17,010.00

- Related Documents**
- Requisition: 3035622
 - Change Requests: 3045455
 - Change Requests: 3035495
 - Change Requests: 3035664
 - Change Requests: 3035629
 - Voucher: 10000343

What's next?

Workflow Status ● Completed



Create Change Request

This will create a change request comment for this purchase order. If you select a user they will receive an email indicating that a change request comment has been created for this purchase order.

Email notification(s): [Add recipient](#)

- Kristen L Pickering (Approved Requisition) <ud-mart@udel.edu>
- Kristen Pickering (Prepared by) <kpick@udel.edu>
- Sam Shopper (Prepared for) <ud-mart@udel.edu>

User with change request permission:

- Andy Admin (Approved) <nobody@sciqquest.com>
- Betsy Buyer (Approved) <nobody@sciqquest.com>
- Bil Gonzalez (Approved) <bgonzal@udel.edu>
- Procurement Manager (Test) (Approved) <kpick@udel.edu>
- Test Buyer (Approved) <ud-mart@udel.edu>

[add email recipient...](#)

We only need one of line 1, not 2. Please change quantity.

941 characters remaining [expand](#) [clear](#)

Attach file to this change request (optional):

Attachment Type File Link/URL

File Name

File Upload your file

Adding Change Request Comments:
Select the **Recipients** from **boxes** or...
Use the link to **Add Recipients**
Type your **Request details**.
Attach a document if necessary.
Click **Send Comment**.

Attachments 2 History

Completed

Details

Supplier Status
Sent To Supplier
Supplier
DELWOOD TRAILER SALES INC

Total (17,010.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 17,010.00

17,010.00

Related Documents

- Requisition: 3035622
- Change Requests: 3045455
- Change Requests: 3035495
- Change Requests: 3035664
- Change Requests: 3035629
- Voucher: I0000343

What's next?

Workflow Status Completed



After the request is sent...

- The change request comment will be sent to the selected Requester/DPS for processing and a revised PO will be generated after going through approval workflow.
- The Shopper will see their change request comment 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.



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



Purchase Order • UDB0000060 Revision 0

[Status](#) [Summary](#) [Revisions 1](#) [Confirmations](#) [Shipments](#) [Change Requests](#) [Receipts](#) [Vouchers](#) **Comments 1** [Attachments 1](#) [History](#)

Records found: 1

Show comments for

All ▾



Requester Sean - 10/20/2021 1:29:35 PM

Purchase Order - UDB0000060

Comment Added



test

To add a comment to a PO:
Click the **Comments** tab.
Click on '+ ' sign.

Completed

Details ▾

Supplier Status
Sent To SupplierSupplier
W B MASON CO INC

Total (71,635.01 USD) ▾

Subtotal	71,635.01
	<hr/>
	71,635.01

Related Documents ▾

Requisitions: 3181392



What's next? ▾

Workflow Status ● Completed

Workflow



Submitted



Purchas...
 Status...
 Requests Receipts Vouchers **Comments 1** Attachments 1 History

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.

Show comments for All ▾ +

Completed

Details ▾

Supplier Status
 Sent To Supplier
 Supplier

Enter your comment here detailing what you are changing

This will add a comment to the document. If you select a user it will indicate that a comment has been added to the document.

Email notification(s) | Add recipient

Kristen Pickering (Prepared by) <kpick@udel.edu>

Requester Sean (Prepared for) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

File

Choose File

Upload your file

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

Requester Sean - 10/20/2021 1:29:35 PM

Purchase Order - UDB0000060 Comment Added ↶

test

Workflow Status

Completed

Workflow

Submitted

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Purchase Order • UDB0000060 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers **Comments 2** Attachments 1 History

Records found: 2 Show comments for All ▾ +

Requester Sean - 10/20/2021 3:16:14 PM Purchase Order - UDB0000060 Comment Added ↻

Contacted supplier to remove a line item from the order.
Email sent: Requester Sean <ud-mart@udel.edu>

Requester Sean - 10/20/2021 1:29:35 PM Purchase Order - UDB0000060 Comment Added ↻

test

To view comments in a PO:
Select the **Comments** tab.
Comments are listed newest to oldest.

Completed

Details ▾


Supplier Status
Sent To Supplier

Supplier
W B MASON CO INC

Total (71,635.01 USD) ▾



Subtotal	71,635.01
	71,635.01

Related Documents ▾

Requisitions: 3181392 

What's next? ▾

Workflow Status ● Completed

Workflow  

Submitted



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Creating and Processing a PO Change Request](#)
- [Advanced Change Requests](#)

The above listed guides are designed for employees with the Requester and DPS roles but may provide additional context for Shoppers.

