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 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.).
To add a comment to a PO:
1. Select the **Purchase Order** tab
2. Select **Add Comment** from the **Available Actions** pull-down menu
3. Select **Go**
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 Add Comment**

Manually add “Procurement Help” by searching on user “procurement” to codify change. If Procurement is not notified of changes, PO may not close.
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
  – Cancelling Lines
  – Changing Quantities
  – Changing Prices

• A change will 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 the next several slides.
To view comments in a PO:
1. Select the **Comments** tab
2. Comments are listed newest to oldest
To Create a Change Request in a PO:
1. Select **Change Order Request** from the **Available Actions** pull-down menu
2. Select **Go**

Shoppers seeing this option will only have the opportunity to comment.
Do not tag anyone here unless you are asking one of these people to complete the change request for you. These are system administrators automatically suggested by the program.

If you are a DPS or Requester, you can proceed from here without notifying anyone that the Change Request is coming. If you prefer to send a notification to users associated with the PO, check the box next to their name.
1. Enter a detailed description of what the change request is doing.
2. Attach any documents as required, naming them clearly.
3. Click Create Change Request.

This section is crucial to approvers being able to review and approve quickly. If you omit it or include insufficient detail, your change request may be returned or delayed.
Select Edit Section to open these External Communications Options

1. Set the values to True for resending to both the Supplier and the ERP System Connections options (see next slide for additional notes)

2. Select Save Changes
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
Changes for Non-Catalog Orders

Adding Lines

(first follow slides 7 through 12)
After selecting the External Communications Options
1. Scroll down to the **Lines** section
2. Select **Add Non-Catalog Item for this Supplier**
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 and Close 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** to **Add an External Note** to alert the vendor
2. Select **Add Attachments** for any necessary document(s)
1. Scroll up to the top of the page

1. Select **Submit Request**
Changes for Non-Catalog Orders

Cancelling Lines

(first follow slides 7 through 12)
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 Add Comment

Manually add “Procurement Help” by searching on user “procurement” to codify change. If Procurement is not notified of changes, PO may not close.
After selecting the External Communications Options
1. Scroll down to the Lines section
2. Select the Checkbox next to the line(s) to cancel
3. Select Cancel Selected Items from the Selected Line Item Actions
Scroll up to the top of the page
1. Select Submit Request
Changes for Non-Catalog Orders

Changing Quantities

(first follow slides 7 through 12)
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 **Add Comment**

Manually add “Procurement Help” by searching on user “procurement” to codify change. If Procurement is not notified of changes, PO may not close.
After selecting the External Communications Options:
1. Scroll down to the **Lines** section
2. Select **Edit** for the line item(s) to change
After opening the Edit Line dialog box:
1. Enter the revised Quantity.
2. Make any applicable note(s) in the External Notes section.
3. Select Save.

This should be the new total amount, not an additional amount. This is different from webforms.
After saving the Quantity change:
1. The new **Extended Price** will be updated.
Scroll up to the top of the page

1. Select **Submit Request**
Changes for Non-Catalog Orders

Changing Prices

(first follow slides 7 through 12)
After selecting the External Communications Options,
1. Scroll down to the **Lines** section
2. Select **More Info** next to the line item to change
After opening the Non-Catalog Item dialog box
1. Change the Price to the new amount
2. 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. Select **Edit** to **Add an External Note** to alert the vendor
2. Select **Add Attachments** for any necessary document(s) not attached in the Change Request dialog. *Documentation regarding the price change will be required.*
Scroll up to the top of the page
1. Select **Submit Request**
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).
There are two items to note in this tab:

1. The PO Number now is marked with the latest Revision.
2. The Status of the Change Request is updated as it moves through the workflow.
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”
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 multi-invoice/payment orders (beginning with UDB or UDR), the change request can be made at the header (unless different accounting applies at the line level) but has to be split to adjust between invoiced amount and non-invoiced amount.
- For standard orders (beginning with UDS), the change request should be made at the line(s) not invoiced and not at the header.
Blanket (UDB/UDR) Order changes:

Check the PO for vouchers. Only the “Open” amount can be changed.
Blanket (UDB/UDR) Order changes:

Invoiced Amount Stays as originally submitted.

Split by amount of price and apply the new code to the balance.

This must be done on the line(s) since splitting by amount of price is not permitted in the header.
Standard (UDS) Order Changes:

The PO shows that the line is fully matched ...
Standard (UDS) Order Changes:

... the change request brings up only the two non-invoiced lines.

Even though the third line is not visible, funding changes MUST be made at the lines, not the header!
Standard (UDS) Order Changes:

In the Accounting Codes section, click Edit ONLY on the line items to change funding.
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)