

### Introduction

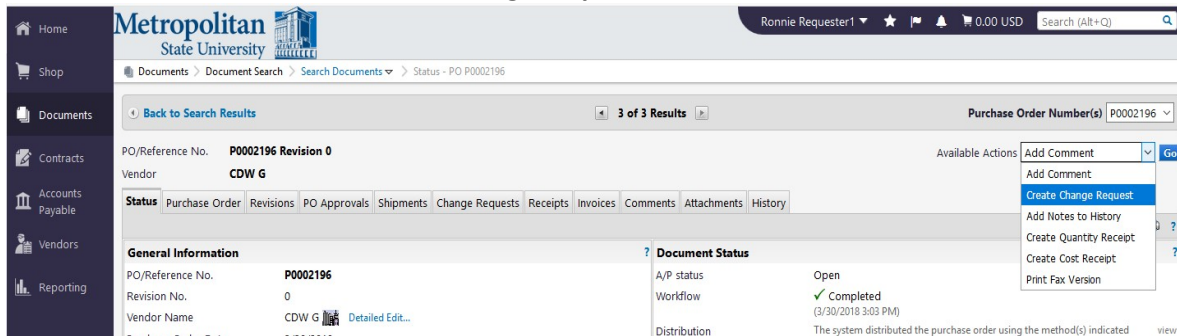
Change Request Form was developed so that requestors can make changes to an existing PO. Changes include; increase or decrease a quantity and/or pricing and line items. No changes to the vendor on a completed PO. When submitting a change request, it will automatically go back through workflow to the appropriate cost center approvers for the entire PO amount, including any funds invoiced for.

**Quick Note:** You **do not** have the ability to create a change request on a fully invoiced PO – You will have to submit an expenditure correction.

### How to submit a Change Request Form to an existing Purchase Order (PO).

Start by search for the PO you wish to change, then open the PO by clicking on the PO number and follow the directions below: **Remember don't use the requisition number**

#### 1. In Available Actions select **Create Change Request** and click **Go**:

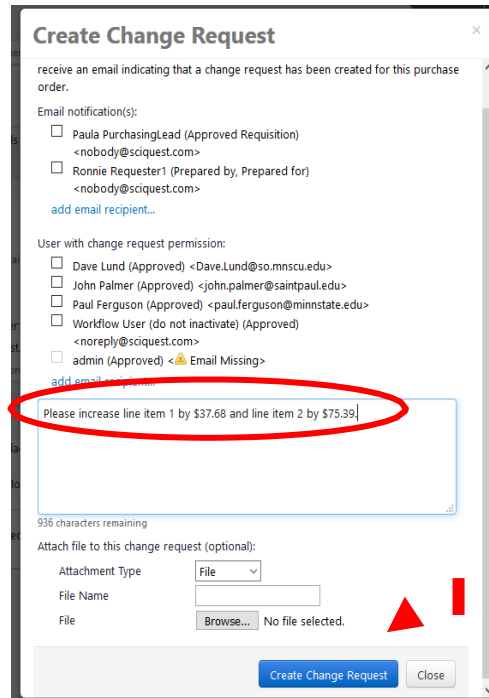


The screenshot shows the Marketplace interface for a Purchase Order (PO) with Reference No. P0002196. The 'Available Actions' dropdown menu is open, showing options like 'Add Comment', 'Create Change Request', and 'Print Fax Version'. A red arrow points to the 'Go' button next to the dropdown.

Select **your email and purchasing** to include more users. Don't add accounts payable to a change request as they don't work with these. Enter a description of the change in the text field and click **Create Change Request**:

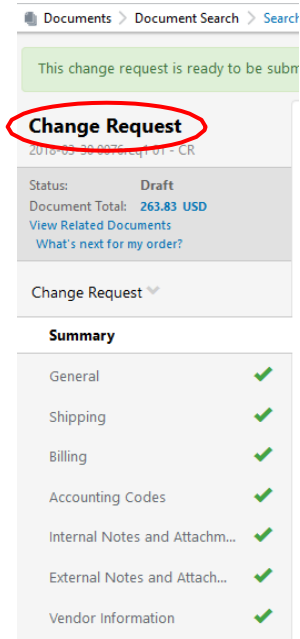
#### NOTE:

- **ALWAYS** add a comment to explain why the change is needed.
- **Example:** Needing to add \$100.00 to PO due to high shipping costs. Increase PO from \$100.00 to \$200.00. Or if increasing the quantity always list the original quantity and new quantity in the comment.



The 'Create Change Request' dialog box is shown. It includes sections for 'Email notification(s)', 'User with change request permission', and a text input field for the change description. A red circle highlights the text input field containing the comment: "Please increase line item 1 by \$37.68 and line item 2 by \$75.39". A red arrow points to the 'Create Change Request' button.

2. On the top left of the page the requisition will say **Change Request**:



Documents > Document Search > Search

This change request is ready to be submitted

**Change Request**

2019-05-20 09:07:41 01 - CR

Status: Draft  
Document Total: 263.83 USD  
[View Related Documents](#)  
[What's next for my order?](#)

Change Request ▾

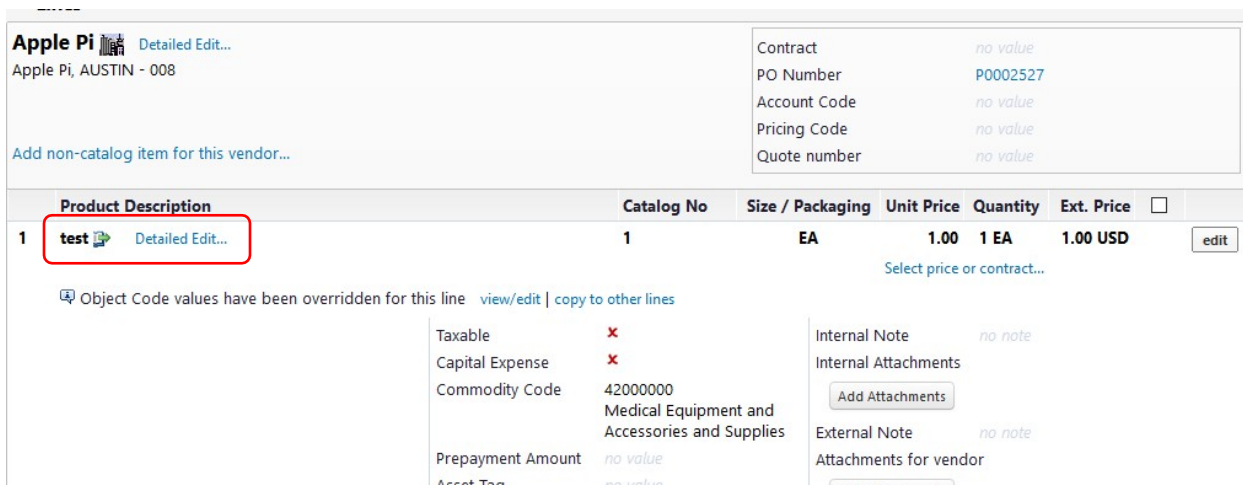
**Summary**


General	✓
Shipping	✓
Billing	✓
Accounting Codes	✓
Internal Notes and Attachm...	✓
External Notes and Attach...	✓
Vendor Information	✓

3. This is where you enter in the change for the amount or quantity to be changed.

### Changes on Non-Catalog Orders:


**Quantity or Pricing changes:** Scroll down to **Lines**. Under **Lines** you will see the **Product Description** clicking on detailed edit.




**Apple Pi**  [Detailed Edit...](#)  
Apple Pi, AUSTIN - 008

[Add non-catalog item for this vendor...](#)

Contract	no value
PO Number	P0002527
Account Code	no value
Pricing Code	no value
Quote number	no value

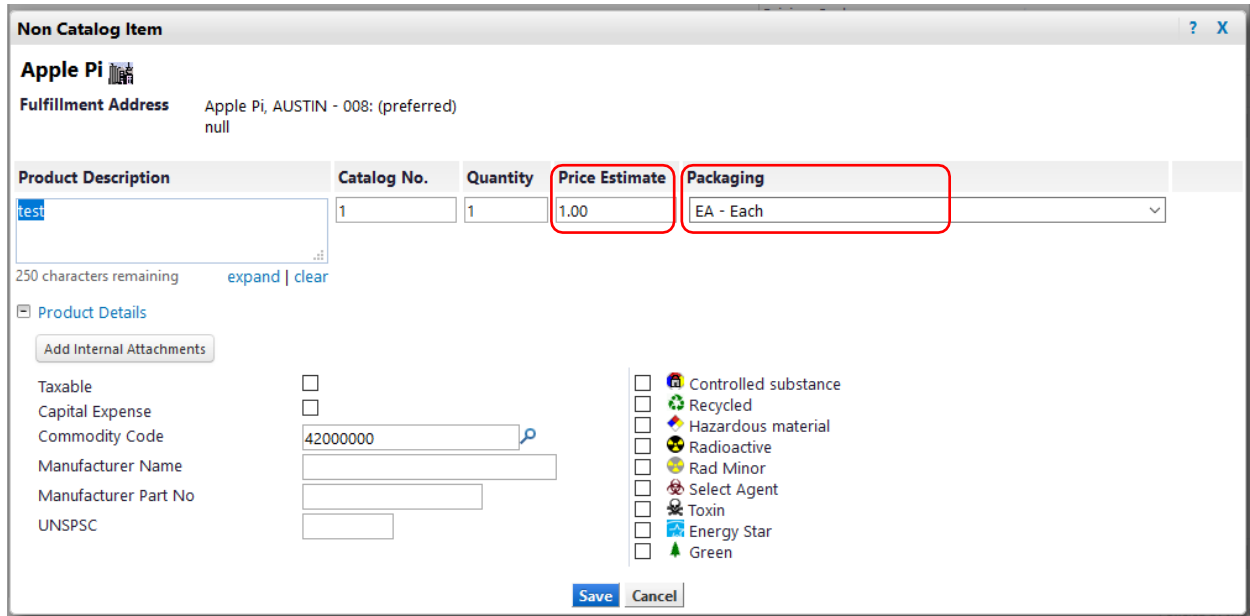
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 test  <a href="#">Detailed Edit...</a>	1	EA	1.00	1 EA	1.00 USD	<input type="checkbox"/> <a href="#">edit</a>

[Select price or contract...](#)

 Object Code values have been overridden for this line [view/edit](#) | [copy to other lines](#)

Taxable	✗	Internal Note	no note
Capital Expense	✗	Internal Attachments	
Commodity Code	42000000	<a href="#">Add Attachments</a>	
	Medical Equipment and Accessories and Supplies	External Note	no note
Prepayment Amount	no value	Attachments for vendor	
Asset Tag	no value		

Adjust the dollar amount or quantity in the **product description** section. Click **Go**. After the changes have been saved and click **Close**. **In the line you can make adjustments and always remember to click save.**



**Non Catalog Item**

**Apple Pi**

Fulfillment Address: Apple Pi, AUSTIN - 008: (preferred)  
null

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
test	1	1	1.00	EA - Each

250 characters remaining expand | clear

**Product Details**

Add Internal Attachments

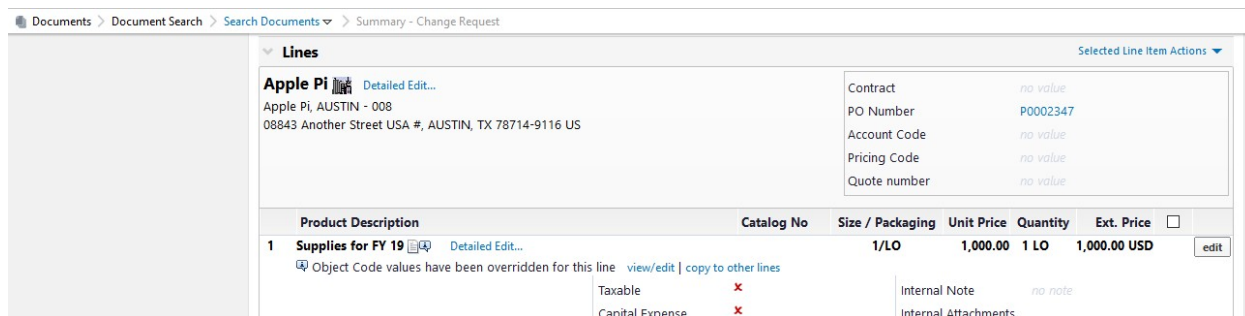
Taxable   
 Capital Expense   
 Commodity Code: 42000000  
 Manufacturer Name:   
 Manufacturer Part No:   
 UNSPSC:

Controlled substance  
 Recycled  
 Hazardous material  
 Radioactive  
 Rad Minor  
 Select Agent  
 Toxin  
 Energy Star  
 Green

Save Cancel

### Changes on Blanket Orders:

**Quantity or pricing changes:** Scroll down to **Lines**. Under **Lines** you will see the **Product Description** clicking on detailed edit.



Documents > Document Search > Search Documents > Summary - Change Request

**Lines**

**Apple Pi** Detailed Edit...  
 Apple Pi, AUSTIN - 008  
 08843 Another Street USA #, AUSTIN, TX 78714-9116 US

Contract: no value  
 PO Number: P0002347  
 Account Code: no value  
 Pricing Code: no value  
 Quote number: no value

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Supplies for FY 19 Detailed Edit... Object Code values have been overridden for this line view/edit   copy to other lines		1/LO	1,000.00	1 LO	1,000.00 USD

Taxable:   
 Capital Expense:

Internal Note: no note  
 Internal Attachments

Adjust the dollar amount or quantity in the **Blanket Order Amount** section. Click **Go**. After the changes have been saved and click **Close**.

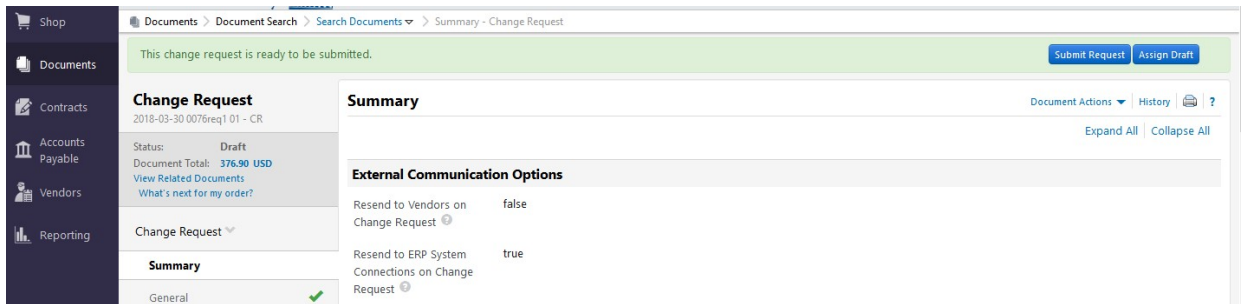
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 test <a href="#">Detailed Edit...</a>	1	EA	1.00	1 EA	1.00 USD	<input type="button" value="edit"/>

Select price or contract...

Object Code values have been overridden for this line [view/edit](#) | [copy to other lines](#)

Taxable	×	Internal Note	no note
Capital Expense	×	Internal Attachments	
Commodity Code	42000000	<input type="button" value="Add Attachments"/>	
	Medical Equipment and Accessories and Supplies	External Note	no note

Scroll to the top of the page and click **Submit Request**:



This change request is ready to be submitted.

**Change Request**  
2018-03-30 0076req1 01 - CR

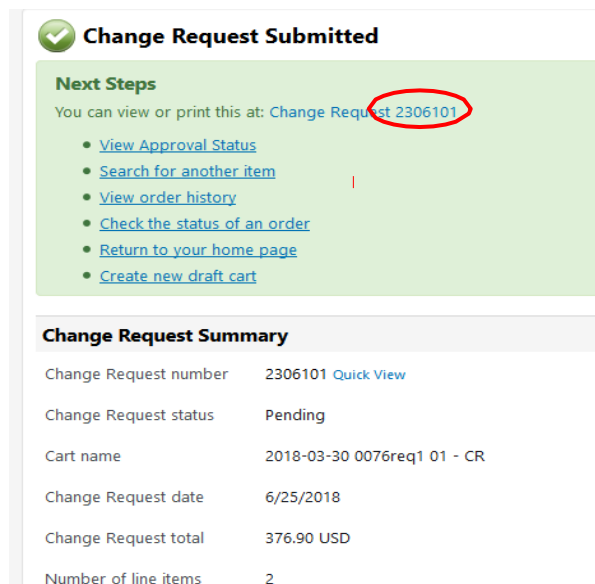
Status: Draft  
Document Total: 376.90 USD  
[View Related Documents](#)  
[What's next for my order?](#)

**Summary**  
General

**External Communication Options**

Resend to Vendors on Change Request	false
Resend to ERP System Connections on Change Request	true

A Change Request number has been created. Click **View Approval Status** to view the workflow.



**Change Request Submitted**

**Next Steps**  
You can view or print this at: [Change Request 2306101](#)

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

**Change Request Summary**

Change Request number	2306101 <a href="#">Quick View</a>
Change Request status	Pending
Cart name	2018-03-30 0076req1 01 - CR
Change Request date	6/25/2018
Change Request total	376.90 USD
Number of line items	2