



## CREATING & PROCESSING a PO Change Request

FOR REQUESTERS & DEPARTMENT PURCHASING SPECIALISTS ONLY

*Revised 2/13/2025*

For the **Shopper** Role, please refer to:

[“Requesting a PO Change Request”](#)



# Who Can Create a Change Request?

Change Requests can be *created and submitted* by a Requester or Department Purchasing Specialist (DPS).

- A Requester or DPS can create change requests for POs **within their department access**.
  - Default access(visibility) in UDX is determined by employees' HR department.
  - If a Requester or DPS needs expanded department access because they support employees in other departments, a DPS can submit the UDX Access Request form for an Access Update.
  - The request can be for themselves or for another system user and will need to include the department IDs needed.
- A Requester or DPS can create change requests for their own orders and can also create them *on behalf of* Shoppers.
  - When a Shopper “creates” a change request on their Purchase Order, they must select an employee with a Requester or DPS role as a comment recipient.
  - The Requester or DPS the Shopper selects will be notified via e-mail.
  - The Shopper's requested changes will also be documented in the Comments tab of the PO.



# 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 requisitions. If dollar amounts have been adjusted, the approval workflow will be adjusted for cumulative total dollar amount.
4. You cannot change a line that's been fully invoiced and vouchered.
5. Always check for the account code since UDX will let you submit a change request without one.

Note: Change Requests should NOT be initiated for the following: Closing or Canceling entire POs, making changes to Catalog Orders.



# In This Guide

All Change Requests begin the same way, **as shown in slides [4-9](#)**.

**Common Reasons** for Change Requests are covered in this guide:

**Slide**

Adding Lines to a PO

[10](#)

Cancelling PO Lines

[17](#)

Changing Quantities on a Line

[23](#)

Changing Prices on a Line

[30](#)

Monitoring Your Change Requests

[37](#)

Changes for catalog orders where change requests are not used

[41](#)

## The [Advanced Change Request Guide](#) covers:

Changing Funding on a Vouchered PO

Zero Dollar Lines

Form Based POs: Subawards, legacy Waiver of Bids, NPOPs



Records found: 4

Status	Number	Owner	Created
Completed	3035629	Kristen Pickering	8/14/2020
Completed	3035664	Kristen Pickering	8/14/2020
Completed	3035495	Kristen Pickering	8/14/2020
Completed	3045455	Kristen Pickering	9/1/2020

To Create a Change Request in a PO:  
Click the **Change Requests** tab.  
Click **+** sign.

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



Status

Summary

Revisions 6

Confirmations

Shipments

Change Requests 4

Receipts

Vouchers 1

Comments 1

Attachments 2

History

General Information

PO/Reference No. UDST000680

Revision No. 5

Priority Normal

Supplier Name DELWOOD TRAILER

Address 10033 CANTERBURY ROAD  
FELTON, Delaware 19943-5470 United States

Purchase Order Date 8/14/2020

Total 17,010.00

Requisition Number 3035622 view | print

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWARE

Payment Term Override

eBuilder Process Instance no value

Multi-Invoice/Payment

Contact Information

Owner Name Test Shopper

Owner Phone

Shipping Information

Ship To University of Delaware

United States

ShipTo Address Code NC32

Delivery Options

Expedite

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Billing/Payment

Bill To Accounts Payable

BillTo Address Code

BillTo

Billing Options

Accounting Date no value

Payment Terms 0% 0, Net 30

F.O.B. Destination

You may also click the ellipsis on the PO and select **Create Change Request** from the menu.

- ...
- Add Comment

Create Change Request

Add Notes to History

Cancel PO

Finalize Revision

Create Quantity Receipt

Print Fax Version

Send Test PO

Soft Close PO

Close PO

Details

Supplier Status

Sent To Supplier

Supplier DELWOOD TRAILER

Total (17,010.00)

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

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Purchase Order • DELWOOD TRAILER SALES INC • UDST000680 Revision

StatusSummaryRevisions6ConfirmationsShipments

Records found: 4

Status	Number	Owner
Completed	3035629	Kris
Completed	3035664	Kris

Create Change Request

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

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

☐ Kristen L Pickering (Approved Requisition) <kpick@udel.edu>

☐ Kristen Pickering (Prepared by) <ud-mart@udel.edu>

☒ Sam Shopper (Prepared for) <ud-mart@udel.edu>

User with change request permission:

☐ Amy Drag (Approved) <ud-mart@udel.edu>

☐ Christian Aha (Approved) <ud-mart@udel.edu>

☐ Debbie Diversity (Approved) <bgonzal@udel.edu>

☐ Lauren Romeo (Approved) <ud-mart@udel.edu>

☐ Test Buyer (Approved) <ud-mart@udel.edu>

[add email recipient...](#)

Change Request Reason

Increase line 1 to cover expenses for trailer accessories

943 characters remaining [expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type

☒ File

☐ Link/URL

Create Change Request

Close

1

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

Powered by JAGGAER | Privacy Policy

In the Create Change Request Window:

Select any **Recipients** from **boxes** or...

Use the link to **Add Recipients**

Type the **Change Request Reason**.

Attach a document if necessary.

Click **Create Change Request**.



Change Requests • 3787993

SummaryPO PreviewExternal CommunicationComments 1Attachments 2History

Changes will not be sent to the Supplier.

Change Request Reason

ReasonIncrease line 1 to cover expenses for trailer accessories

General

Cart Nametest change order - CR(4)

Shipping

Ship To

Billing

Bill To

Note the default setting in UDX is to NOT send PO changes to the supplier.  
If the supplier SHOULD receive the revised PO, click the **External Communication** tab.

Prepared forSam Shopper  
DepartmentCASHIER'S OFFICE (04602)  
Ad-Hoc ApproverSelect  
Multi-Invoice/Payment✗

Room: atrium  
170 THE GREEN  
MEMORIAL HALL  
Newark, DE 19716  
United States

Billing Options

Purchasing Business UnitUOD01  
UNIVERSITY OF DELAWARE  
Payment Term Override✗  
Tax Flag✗

Internal Fields

UD Internal Fields

eBuilder Process Instanceno value  
After-The-Fact Purchase✗

Draft

Be aware of these issues.  
You may review and proceed.

Total (16,990.00 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.

Subtotal16,990.00  
16,990.00

Purchase Order: UDST000680  
Requisition: 3035622

What's next for my order?

Next StepCOA Approver  
ApproverDrag, Amy

Workflow

Show skipped steps

Draft  
Active  
Margot Martin  
On behalf of: Sam Shopper





UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Change Requests • 3787993

Summary

PO Preview

External Communication

Comments 1

Attachments 2

History

Resend to...

☐ Suppliers on Change Request

☒ ERP System Connections on Change Request

☒ POExport

Draft

Be aware of these issues.

You may review and proceed.

Total (16,990.00 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.

## Options on the External Communications Tab:

### Resend to Suppliers on Change Request

- Defaults to False (Unchecked)
- **Set to True (Checked)** for anything the supplier needs to receive (updated quote, changes to quantity or price, etc.)
- You do not need to check this box if your request is only making accounting changes

### Resend to ERP Connections on Change Request/POExport

- Defaults to True
- Sends all updates to PeopleSoft
- No need ever to set to False; PeopleSoft will automatically pick up changes

Resend to...

- ✓ Suppliers on Change Request
- ✓ ERP System Connections on Change Request
- ✓ POExport

Check the **Suppliers on Change Request** box to send the revision to the supplier.  
Do not uncheck the other two boxes.

Draft

⚠ Be aware of these issues.  
You may review and proceed.

Total (16,990.00 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	16,990.00
	16,990.00

Related Documents

Purchase Order: UDST000680

Requisition: 3035622

What's next for my order?

Next Step COA Approver

Approver Drag, Amy

Workflow

Show skipped steps

Draft

Active

Margot Martin

On behalf of: Sam Shopper



# Changes for Non-Catalog Orders

## Adding Lines

(first follow slides 4 through 9)



Summary

PO Preview

External Communication

Comments 1

Attachments 2

History

Sourcing Statusno value

Additional Notes to print on PO

no value

Sourcing Event Titleno value

Sourcing Est. Award Amountno value

Sourcing Award Dateno value

2 Items

DELWOOD TRAILER SALES INC • 2 Items • 16,990.00 USD

SUPPLIER DETAILS

Contractno value

PO NumberUDST000680

Quote number1329

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2018 HomesteaderVN#5HABE2427JN066751	824AB	EA	8,495.00	2 EA	16,990.00

Draft

Be aware of these issues.  
You may review and proceed.

Total (16,990.00 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.

16,990.00

16,990.00

Related Documents

Purchase Order: UDST000680

Requisition: 3035622

What's next for my order?

Next Step

COA Approver

ig, Amy

PS

Margot Martin

On behalf of: Sam Shopper

After selecting the External Communications options, return to the **Summary** tab:

Scroll down to the **Items** section.

Click the **ellipses** and select **Add Non-Catalog Item**.

PO Type Override



UNIVERSITY OF DELAWARE  
EXCHANGE

TEST SITE

Change Requests • 3787993

Summary

PO Preview

External Communication

Comments 1

Attachments 2

Sourcing Status

no value

Sourcing Event Title

no value

Sourcing Est. Award Amount

no value

Sourcing Award Date

no value

Add Non-Catalog Item

DELWOOD TRAILER SALES INC

Fulfillment Address

MAIN - 10033 CANTERBURY ROAD, FELTON, Delaware 19943-5470 United States

Item

Product Description \*

2019 Homeward trailer

233 characters remaining

Supplier Item Number

Quantity \*

1

Price Estimate

7980.00

Packaging

EA

Additional Details

Commodity Code

25101503

★ Required fields

🔊 Preferred

Save

Save And Add Another

Close

Complete Add Non-Catalog Item window with these details:

1. Description

2. Supplier Item Number (if available)

3. Quantity

4. Price

5. Packaging

6. Commodity Code

7. Select **Save** to move on or **Save and Add Another** to create more lines and **repeat the steps above**.

UNIVERSITY OF  
DELAWARE

12

SummaryPO PreviewExternal CommunicationComments 1Attachments 2History

Contract:

no value

Commodity Code

25101503 / Commercial, Military and Private Vehicles & Components (Automobile)

Account Code

167900  
CAPITAL EQUIPMENT

Internal Note/Business Justification

no value

Internal Attachments

Add

External Note

no value

Attachments for supplier

Add

↓ EMS+Gator+Trailer+7-13-18.pdf

...

PO Type Override

✗

ACCOUNTING CODES

Work Order Number	SpeedType	Purpose
N/A	PURC110000	PURC110000
N/A	R/E	R/E
	PROCUREMENT SERVICES	PROCUREMENT SERVICES

22019 Homeward trailerEA7,980.001EA7,980.00⋮

ITEM DETAILS

Contract:

no value

Commodity Code

25101503 / Commercial, Military and Private Vehicles & Components (Automobile)

Account Code

no value

Internal Note/Business Justification

no value

Internal Attachments

Add

External Note

no value

Attachments for supplier

Add

PO Type Override

✗

The new line item(s) will now be visible.  
Click the **Pencil** to edit the additional line details.

Draft

⚠ Be aware of these issues.

You may review and proceed.

Total (24,970.00 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.

Subtotal24,970.00

24,970.00

Related Documents

Purchase Order: UDST000680

Requisition: 3035622

What's next for my order?

Next StepCOA Approver

ApproversDrag, Amy  
Oliver, Susan

Workflow

Show skipped steps

Draft

Active

Margot Martin

On behalf of: Sam Shopper



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Change Requests • 3787993

Summary PO Preview External Communication Comments 1 Attachments 2 History

### Edit Line 2: Item Details

2 2019 Homeward trailer EA 7,980.00 1 EA 7,980.00

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

Commodity Code \* 25101503 Commercial, Military and Private Vehicles & Components (Automobile)

Account Code \* 167900

Internal Note/Business Justification 1000 characters remaining [expand](#) [clear](#)

External Note per updated quote provided for additional trailer 951 characters remaining [expand](#) [clear](#)

PO Type Override ☐

[Save](#) [Close](#)

2 2019 Homeward trailer

ITEM DETAILS

Contract:

Commodity Code

Account Code no value

External Note no value

Attachments for supplier [Add](#)

PO Type Override [×](#)

Requisition: 3035622

What's next for my order?

Next Step COA Approver

Approvers Drag, Army Oliver, Susan

Workflow [Show skipped steps](#)

**Draft**  
Active  
Margot Martin  
On behalf of: Sam Shopper

Powered by JAGGAER | Privacy Policy

Add an **External Note** to alert the vendor.  
Add the **Account Code** if not defaulted.  
Click **Save**.

Click Submit Request.

Submit Request

SummaryPO PreviewExternal CommunicationComments 1Attachments 2History

Contract:  
Commodity Code  
Account Code

no value  
25101503 / Commercial, Military and Private Vehicles & Components (Automobile)  
167900  
CAPITAL EQUIPMENT

Internal Note/Business Justification  
Internal Attachments  
External Note  
Attachments for supplier  
PO Type Override

no value  
Add  
no value  
Add  
×

↓ EMS+Gator+Trailer+7-13-18.pdf

...

ACCOUNTING CODES

Values have been overridden for this line

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	Project Type 1	User Ref	Cost Share Project	Project Type 2
N/A N/A	PURC110000 R/E PROCUREMENT SERVICES	PURC110000 R/E PROCUREMENT SERVICES	OPBAS OPERATING BASIC	04750 PROCUREMENT SERVICES	ADALL ADMINISTRATIVE ALLOWABLE	no value	no value	no value	no value	no value	no value

2 2019 Homeward trailer

EA

7,980.00

1 EA

7,980.00

...

ITEM DETAILS

Contract:  
Commodity Code  
Account Code

no value  
25101503 / Commercial, Military and Private Vehicles & Components (Automobile)  
167900  
CAPITAL EQUIPMENT

Internal Note/Business Justification  
Internal Attachments  
External Note  
Attachments for supplier  
PO Type Override

no value  
Add  
per updated quote provided for additional trailer  
Add  
×

Draft

Be aware of these issues.

You may review and proceed.

Total (24,970.00 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.

Subtotal24,970.00

24,970.00

Related Documents

Purchase Order: UDS000680

Requisition: 3035622

What's next for my order?

Next StepCOA Approver

ApproversDrag, Amy  
Oliver, Susan

Workflow

Show skipped steps

Draft

Active

Margot Martin

On behalf of: Sam Shopper



Summary	PO Preview	External Communication	Comments 1	Attachments 2	History
Contract	no value	PO Number	UDST000680		
Quote number	1329				
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 2018 HomesteaderVN#5HABE2427JN066751	824AB	EA	8,495.00	2 EA	16,990.00
<div>ITEM DETAILS</div> <div><div>Contract:</div><div>Commodity Code</div><div>Account Code</div></div> <div><div>(Automobile)</div><div>167900 CAPITAL EQUIPMENT</div><div>External Note</div></div> <div><div>Attachments for supplier</div><div>EMS+Gator+Trailer+7-13-18.pdf</div><div>PO Type Override</div></div>					
This line item has been added					
2 2019 Homeward trailer		EA	7,980.00	1 EA	7,980.00
<div>ITEM DETAILS</div> <div><div>Contract:</div><div>Commodity Code</div><div>Account Code</div></div> <div><div>Internal Note/Business Justification</div><div>Internal Attachments</div><div>External Note</div></div> <div><div>Attachments for supplier</div><div>per updated quote provided for additional trailer</div><div></div></div>					

Pending

Be aware of these issues.  
You may review and proceed.

Total (24,970.00 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

24,970.00

24,970.00

Related Documents

Purchase Order: UDST000680

Requisition: 3035622

What's next for my order?

Next Step

COA Approver

Approvers

Drag, Amy  
Oliver, Susan

Workflow

Show skipped steps

Submitted

11/9/2021 8:53 AM  
Richard Requester  
On behalf of: Kristen Pickering



# Changes for Non-Catalog Orders

## Cancelling Lines

(first follow slides 4 through 9)





## Change Requests • 3395628



Assign Draft

Submit Request

[Summary](#) [PO Preview](#) [External Communication](#) [Comments](#) [Attachments](#) [History](#)

Changes will be sent to the Supplier.

## Change Request Reason

Reason Remove the service charge

## General

## Shipping

## Billing

Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier.

Prepared by Richard Requester

Prepared for Kristen Pickering

Purchasing UOD01  
Business Unit UNIVERSITY OF DELAWAREeBuilder no value  
Process  
Instance162 THE GREEN  
HULLIHEN HALL  
NEWARK, DE 19716  
United States

## Delivery Options

Expedite



Ship Via

Best Carrier-Best Way

Newark, DE 19716  
United States

## Billing Options

Accounting Date no value

## Draft

Total (7,580.00 USD)

Subtotal	7,580.00
	<b>7,580.00</b>

## Related Documents

[Purchase Order: UDBT000092](#)[Requisitions: 3328084](#)

## What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

## Workflow



## Draft

Active  
Richard Requester  
On behalf of: Kristen Pickering

Start - Parallel Steps



Summary PO Preview External Communication Comments Attachments History

Changes will be sent to the Supplier.

Change Request Reason

Reason

Account

Work

Number

N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value
N/A	R/E PROCUREMENT SERVICES	R/E PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE				

3 Items

TRI-STATE CARPET INC • 3 Items - 7,580.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 labor to replace flooring	labor	EA	5,980.00	1 EA	5,980.00	...
2 include upgraded padding		EA	1,500.00	1 EA	1,500.00	...
3 service charge for extra visit		EA	100.00	1 EA	100.00	...

**Draft**

Total (7,580.00 USD)

7,580.00

7,580.00

**Documents**

Order: UDBT000092

Requisitions: 3328084

**What's next for my order?**

Next Step Wait for Validation Response

There are no approvers

**Workflow**

**Draft**

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

**PR Validation**

Future

Scroll down to the **Line Items** section

Select the **Checkbox** next to the line(s) to cancel

Select the **Selected Line Item Actions** menu and click **Cancel Selected Items**.

Cancel Selected Items



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

AllSearch (Alt+Q)396.00 USDAssign DraftSubmit Request

Change Requests • 3395628

SummaryPO PreviewExternal CommunicationCommentsAttachments

Changes will be sent to the Supplier.

Change Request Reason

ReasonRemove the service charge

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000							
N/A	R/E PROCUREMENT SERVICES	R/E PROCUREMENT SERVICES							

3 Items

TRI-STATE CARPET INC • 3 Items • 7,580.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 labor to replace flooring	labor	EA	5,980.00	1 EA	5,980.00
2 include upgraded padding		EA	1,500.00	1 EA	1,500.00
3 service charge for extra visit		EA	100.00	1 EA	100.00

Cancel Selected Items

Specify a reason for canceling the line.

Negotiated cancellation of the service charge.

954 characters remaining

expand | clear

OKCancel

Enter the reason for the cancellation and click OK.

Draft

Total (7,580.00 USD)

Subtotal7,580.00

7,580.00

Related Documents

Purchase Order: UDBT000092

Requisitions: 3328084

What's next for my order?

Next StepWait for Validation Response

ApproversThere are no approvers

Workflow

Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Future

Powered by JAGGAER | Privacy Policy



Change Requests • 3395628

Summary PO Preview External Communication Comments 1 Attachments History

Changes will be sent to the Supplier.

Change Request Reason


Reason Remove the service charge

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value
N/A	R/E PROCUREMENT SERVICES	R/E PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE				

2 Items

TRI-STATE CARPET INC - 3 Items - 7,480.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 labor to replace flooring	labor	EA	5,980.00	1 EA	5,980.00
2 include upgraded padding				1 EA	1,500.00
3  service charge for extra visit		EA	100.00	1EA	100.00

Note the cancelled item has an icon indicating it was cancelled.

Click Submit Request.

Assign Draft Submit Request

**Draft**

Total (7,480.00 USD)

Subtotal7,480.007,480.00

**Related Documents**

Purchase Order: UDBT000092

Requisitions: 3328084

**What's next for my order?**

Next StepWait for Validation Response

ApproversThere are no approvers

Workflow

**Draft**

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

**PR Validation**

Future

Summary

PO Preview

External Communication

Comments1

Attachments

History

PO Type Override

×

2

↺

include upgraded padding

EA

1,500.00

1

EA

i

1,500.00

...

ITEM DETAILS

Contract:

no value

Internal Note/Business Justification

no value

Commodity Code

30000000 / Structures, Building, Construction, Manufacturing Components & Supplies

Internal Attachments

Add

Account Code

161201  
STRUCTURAL COMPONENTS

External Note

please add to order

3

⊘

service charge for extra visit

EA

100.00

1

EA

i

100.00

...

ITEM DETAILS

Contract:

no value

Internal Note/Business Justification

no value

Commodity Code

72000000 / Building, Facility Construction & Maintenance Services

Internal Attachments

Account Code

164023  
CARPET/RESILIENT FLOORING

External Note

no value

Attachments for supplier

PO Type Override

×

Approvers will see the cancellation icon on the relevant line.

Pending

Total (7,480.00 USD)

Subtotal 7,480.00

7,480.00

Related Documents

Purchase Order: UDBT000092

Requisitions: 3328084

What's next?

Workflow

Show skipped steps

Submitted

11/9/2021 12:52 PM

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Completed

Wait for Validation Response

Approvers will see the cancellation icon on the relevant line.

3
 service charge for extra visit

ITEM DETAILS

Contract:

no value

Commodity Code

72000000 / Building, Facility Construction & Maintenance Services

Account Code

164023

CARPET/RESILIENT FLOORING

Internal Note/Business Justification

no value

Internal Attachments

External Note

no value

Attachments for supplier

PO Type Override

# Changes for Non-Catalog Orders

## Changing Quantities

(first follow slides 4 through 9)







Change Requests • 3396143

Summary PO Preview External Communication Comments Attachments History

⋮ 👁 🖨 ? ⋮ Assign Draft Submit Request

📘 Changes will not be sent to the Supplier.

Change Request Reason

Reason increase to cover invoice.

Accounting Codes

Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier (if needed).

Share Project

5,000 Items

TECHNICAL FIBRE PRODUCTS INC • 5,000 Items • 28,950.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 fibre		EA	5.79	5,000 EA	28,950.00

Draft

Total (28,950.00 USD)

Subtotal 28,950.00

28,950.00

Related Documents

Purchase Order: UDBT000014

Requisitions: 3395963

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow

📍 Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

🕒 PR Validation

Future



SummaryPO PreviewExternal CommunicationCommentsAttachmentsHistory

1

Changes will not be sent to the Supplier.

Change Request Reason

Reasonincrease to cover invoice

Accounting Codes

Work Order NumberSpeedType

N/APURC17

N/A R/E CONT MANAGER

Scroll down to the **Line 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.

5,002.1391 Items

TECHNICAL FIBRE PRODUCTS INC • 5,002.1391 Items • 28,962.39 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 fibre		EA	5.79	5,002.1391 EA	28,962.39	

Draft

Total (28,962.39 USD)

Subtotal28,962.39

28,962.39

Related Documents

Purchase Order: UDBT000014

Requisitions: 3395963

What's next for my order?

Next StepWait for Validation Response

ApproversThere are no approvers

Workflow

Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Future



## Change Requests • 3396143



Assign Draft

Submit Request

Summary PO Preview External Communication Comments Attachments History

Additional Notes to print on PO  
no value

5,002.1391 Items

TECHNICAL FIBRE PRODUCTS INC • 5,002.1391 Items • 28,962.39 USD

SUPPLIER DETAILS PROCARD : 679 MARIAVILLE RD, SCHENECTADY, New Y...

After the new Quantity is saved:  
The new **Extended Price** will be updated.  
Click the **pencil** on the line to add notes if needed.

Quantity

Ext. Price

1 Fibre EA 5.79 5,002.1391 EA 28,962.39

ITEM DETAILS

Contract:	no value	Internal Note/Business Justification	no value
Commodity Code	13000000 / Resin, Rosin, Rubber, Foam, Film & Elastomeric Materials	Internal Attachments	Add
Account Code	141205 RESINS/ELASTOMERS	External Note	no value
		Attachments for supplier	Add
		PO Type Override	X



**Draft**

Total (28,962.39 USD)

Subtotal28,962.39

28,962.39

**Related Documents**

Purchase Order: UDBT000014

Requisitions: 3395963

**What's next for my order?**

Next StepWait for Validation Response

ApproversThere are no approvers

Workflow

**Draft**

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

**PR Validation**

Future



Edit Line 1: Item Details

1 fibre EA 5.79 5,002.1391 EA 28,962.39

Contract:

Commodity Code \*

13000000

Resin, Rosin, Rubber, Foam, Film & Elastomeric Materials

Account Code \*

141205

Internal Note/Business Justification

Increasing to cover amount invoiced

965 characters remaining

[expand](#) | [clear](#)

External Note

1000 characters remaining

[expand](#) | [clear](#)

Enter comments as needed.  
Click **Save**.

Save

Close

1 fibre

EA

5.79

5,002.1391

EA

28,962.39

ITEM DETAILS

Contract:

no value

Commodity Code

13000000 / Resin, Rosin, Rubber, Foam, Film & Elastomeric Materials

Account Code

141205  
RESINS/ELASTOMERS

Internal Note/Business Justification

no value

Internal Attachments

[Add](#)

External Note

no value

Attachments for supplier

[Add](#)

PO Type Override



Approvers

There are no approvers

Workflow



**Draft**

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

**PR Validation**

Future



Change Requests • 3396143

⋮ ... [Assign Draft](#) [Submit Request](#)

Click **Submit Request**.

Summary PO Preview External Communication Comments Attachments 1 History

ITEM DETAILS

Contract:

no value

Internal Note/Business Justification

no value

Commodity Code

47000000 / Cleaning Equipment & Supplies

Internal Attachments

Add

Account Code

141219  
CLEANING AND JANITORIAL SUPPLI

External Note

no value

Attachments for supplier

Add

PO Type Override

✗

5

Stripper

EA

250.00

2

EA

500.00

⋮

ITEM DETAILS

Contract:

no value

Internal Note/Business Justification

no value

Commodity Code

47000000 / Cleaning Equipment & Supplies

Internal Attachments

Add

Account Code

141219  
CLEANING & JANITORIAL SUPPLIES

External Note

The quantity has been increased to two...

Attachments for supplier

Add

PO Type Override

✗

Draft

Total (2,502.17 USD)

Subtotal

2,502.17

2,502.17

Related Documents

Purchase Order: UDST001016

Requisitions: 3307835

What's next for my order?

Next Step

Wait for Validation Response

Approvers

There are no approvers

Workflow

Draft

Active

Requester Sean

On behalf of: Kristen Pickering



Summary PO Preview External Communication Comments Attachments History

Sourcing Award Amount no value

5,002.1391 Items

TECHNICAL FIBRE PRODUCTS INC • 5,002.1391 Items • 28,962.39 USD

SUPPLIER DETAILS PROCARD : 679 MARIAVILLE RD, SCHENECTADY, New Y...

Contract no value PO Number

Quote number no value

Approvers will see the new quantity highlighted.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	fibre		EA	5.79	5,002.1391 EA	28,962.39

ITEM DETAILS

Contract: no value Internal Note/Business Justification Increasing to cover amount invoiced

Commodity Code 13000000 / Resin, Rosin, Rubber, Foam, Film & Elastomeric Materials Internal Attachments Add

Account Code 141205 RESINS/ELASTOMERS External Note no value Attachments for supplier Add

PO Type Override X

Show skipped steps

Submitted

11/9/2021 5:58 PM  
Richard Requester  
On behalf of: Kristen Pickering

Start - Parallel Steps

Wait for Validation Response

Approved

End - Parallel Steps

COA Approver

Active

Dept Purchasing Specialist

Future

Procurement Approval

Future

Start - Parallel Steps

# Changes for Non-Catalog Orders

## Changing Prices

(first follow slides 4 through 9)



Change Requests • 3396195

Summary PO Preview External Communication Comments Attachments History

Changes will be sent to the Supplier.

Change Request Reason

Reason Increase amount for labor to complete job faster

General

Shipping

Billing

Cart Name Test Amount Only 7 - CR(3) Ship To Bill To

Following the steps in slides 4-9, include your change request reason and be sure that the change is being sent to the supplier (if needed).

Prepared by Richard Requester HULLIHEN HALL  
NEWARK, DE 19716 United States

Prepared for Kristen Pickering United States

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWARE

eBuilder Process Instance no value

Multi-Invoice/Payment ✓

Delivery Options

Expedite ✗

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Billing Options

Accounting Date no value

Draft

Total (7,480.00 USD)

Subtotal 7,480.00

7,480.00

Related Documents

Purchase Order: UDBT000092

Requisitions: 3328084

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow

Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Future







- Summary
- PO Preview
- External Communication
- Comments
- Attachments
- History

TRI-STATE CARPET INC • 3 Items • 7,480.00 USD

SUPPLIER DETAILS

Contract no value PO Number UDBT000092

Scroll down to the **Line Items** section and click on the blue **item name** link to make changes.

				Quantity	Ext. Price	
1	<a href="#">labor to replace flooring</a>	labor	EA	5,980.00	1 EA	5,980.00

ITEM DETAILS

Contract: no value Internal Note/Business Justification no value

Commodity Code 72000000 / Building, Facility Construction & Maintenance Services Internal Attachments Add

Account Code 151207 External Note no value

BUILDING AND FACILITY CONSTR Attachments for supplier Add

PO Type Override X

2	<a href="#">include upgraded padding</a>	EA	1,500.00	1 EA	1,500.00
---	--	----	----------	------	----------

ITEM DETAILS

Contract: no value Internal Note/Business no value

Draft

Total (7,480.00 USD)

Subtotal 7,480.00

7,480.00

Related Documents

Purchase Order: UDBT000092

Requisitions: 3328084

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow

Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Future



UNIVERSITY OF DELAWARE  
EXCHANGE  
TEST SITE

AllSearch (Alt+Q)396.00 USD

1

Char

TRI-STATE CARPET INC

Fulfillment Address  
MAIN - 2 SOUTH POPLAR STREET, WILMINGTON, Delaware 19801-5052 United States

Item

Description *	Supplier Item Number	Quantity *	Price	
labor to replace flooring - three laborers, not two 203 characters remaining	labor	1	7000.00	EA

In the Non-Catalog Item window:  
Update **Description** if needed.  
Change the **Price** to the new amount.  
Select **Save**.  
You will see the new price reflected on the line item.

SaveClose

This should be the new *total* amount, not an *additional* amount.

7,480.00  
7,480.00

Richard Requester  
On behalf of: Kristen Pickering  
Start - Parallel Steps  
PR Validation  
Future.  
Powered by JAGGAER | Privacy Policy



Edit Line 1: Item Details

1	labor to replace flooring - three laborers, not two	labor	EA	7,000.00	1	EA	7,000.00
Contract:		Internal Note/Business Justification		<div>1000 characters remaining</div> <div>expand   clear</div>			
Commodity Code *		External Note		<div>923 characters remaining</div> <div>expand   clear</div>			
Account Code *		PO Type Override		<input type="checkbox"/>			

72000000

Building, Facility Construction & Maintenance Services

151207

BUILDING AND FACILITY CONSTRUCT

Click the pencil next to the line item to edit the line **item details** and Add an **External Note** if desired.

Click **Save**.

Save Close

Change Requests • 3396195

Summary PO Preview External Communication Comments Attachments History

2 Items

TRI-STATE CARPET INC - 3 Items - 8,500.00 USD

SUPPLIER DETAILS

Select **Add** next to **Attachments for supplier** to attach any necessary document(s).  
Click **Submit Request**.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 labor to replace flooring - three laborers, not two	labor	EA	7,000.00	1 EA	7,000.00	
ITEM DETAILS						
Contract:	no value	Internal Note/Business Justification	no value			
Commodity Code	72000000 / Building, Facility Construction & Maintenance Services	Internal Attachments	Add			
Account Code	151207 BUILDING AND FACILITY CONSTRUCT	External Note	Per revised quote sent via email, engaging extra laborer to finish by Nov. 10			
		Attachments for supplier	Add			
		PO Type Override	X			

Draft

Total (8,500.00 USD)

Subtotal 8,500.00

8,500.00

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow

Draft

Active

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Future

Change Requests • 3396195

- Summary
- PO Preview
- External Communication
- Comments
- Attachments
- History

SUPPLIER DETAILS

Contract

no value

PO Number

UDBT000092

Quote number

no value

Approvers will see the new amount highlighted.

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	labor to replace flooring - three laborers, not two	labor	EA	7,000.00	1 EA	7,000.00	...
<div>ITEM DETAILS</div> <div><div>Contract:</div><div>no value</div><div>Internal Note/Business Justification</div><div>no value</div></div> <div><div>Commodity Code</div><div>72000000 / Building, Facility Construction &amp; Maintenance Services</div><div>Internal Attachments</div><div>Add</div></div> <div><div>Account Code</div><div>151207 BUILDING AND FACILITY CONSTRUC</div><div>External Note</div><div>Per revised quote sent via email, engaging extra laborer to finish by Nov. 10</div></div> <div><div></div><div></div><div>Attachments for supplier</div><div>Add</div></div> <div><div></div><div></div><div>PO Type Override</div><div>X</div></div>							

2

include upgraded padding

EA

1,500.00

1 EA

1,500.00

...

ITEM DETAILS

Contract:

no value

Internal Note/Business Justification

no value

Commodity Code

30000000 / Structures, Building, Construction, Manufacturing

Pending

Total (8,500.00 USD)

Subtotal

8,500.00

8,500.00

Related Documents

Purchase Order: UDBT000092

Requisitions: 3328084

What's next?

Workflow

Show skipped steps

Submitted

11/9/2021 6:11 PM

Richard Requester

On behalf of: Kristen Pickering

Start - Parallel Steps

PR Validation

Completed

Wait for Validation Response



# Monitoring Your Change Requests

- 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).
- A revised PO will be generated after going through the workflow for approval.



## Purchase Order • UDBT000092 Revision

Status Summary Revisions 4 Confirmations Shipments **Change Requests 1** Receipts Vouchers 2 Comments 1 Attachments History

Records found: 4

Status	Number	Owner	Created
Completed	3395355	Richard Requester	11/9/2021
Completed	3395513	Richard Requester	11/9/2021
Completed	3395628	Richard Requester	11/9/2021
Pending	3396195	Richard Requester	11/9/2021

The **Change Requests** tab of the PO lists all change requests.

The **Status** of the **Change Request** is updated as it moves through workflow.

## Completed

## Details

Supplier Status  
Sent To Supplier  
⚠ one or more lines rejected

Supplier  
TRI-STATE CARPET INC

## Total (11,380.00 USD)

Subtotal 11,380.00  
**11,380.00**

## Related Documents

Requisitions: 3328084  
Change Requests: 3396195  
Change Requests: 3395628  
Change Requests: 3395513  
Change Requests: 3395355  
Vouchers: IT000764  
Vouchers: IT000798

## What's next?

Workflow Status ● Completed

Shop • Shopping Home Page

Orders

Search

My Orders

Approvals

Quick search

My Requisitions

My Purchase Orders

My Vouchers

My Receipts

My Change Requests

Draft Change Requests

My Procurement Requests

Quick Links

[UD Exchange How To Guides](#)

[How Do I Buy \\_\\_\\_\\_\\_ ???](#)

[Commodity Code-Account Crosswalk](#)

[Non-PO Payment Matrix](#)

[Non-Catalog Item](#)

[Request New Supplier](#)

[Request Contract](#)

My Resources

**My Resources**

[Product Release Library](#)

[procurement@udel.edu](#)

[Site Map](#)

f Delaware Exchange provides a pliers. You can search for items pping cart, and assign or the form, and assign or submit.

ices from guides and the to production and while tions; chances are we are

Catalog & Forms Showcases (Under Development)

My Draft Cards

Your submitted change requests can be accessed from **Orders>My Orders>My Change Requests**.

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**.

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

3365621	My Cart's Name	My Drafts	10/20/2021	71,635.01 USD
3301857	2021-07-23 test1000requester 01	My Drafts	7/23/2021	0.00 USD





Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

Here you'll find the goods and services you need. The greatly expanded *University of Delaware Exchange* provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email [procurement@udel.edu](mailto:procurement@udel.edu) if you have specific questions; chances are we are working on it!

Quick Links

- UD Exchange How To Guides
- How Do I Buy \_\_\_\_\_???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- Request New Supplier


My Resources


My Resources  
Product Release Library | [procurement@udel.edu](mailto:procurement@udel.edu)  
[Site Map](#)


Change requests returned to you can also be viewed in your Draft Carts marked with a "CR"


Catalog & Forms Showcase (Under Development)


Procurement Forms

  
Non-PO Payment Request

  
Subaward Request

  
NIIMBL Subaward Request

  
RFX Request (Option 2)

  
Waiver of Bid Request

My Draft Carts

Draft Cart Type All Drafts

Number	Cart	Cart Type	Date	Total
3328465	Optimus Prime Project CR	My Drafts	8/29/2021	37,000.00 USD
3328463	APTIM SUBWARD	My Returned Requisitions	8/29/2021	200.00 USD
3328462	Performance Space UDX	My Drafts	8/29/2021	500.00 USD
3328453	2021-08-28	My Drafts	8/28/2021	2,852.00 USD
3328425	2021-08-27 twood 01	My Drafts	8/27/2021	40,000.00 USD

# 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

test

Purchase Order - UDB0000060 Comment Added ↺

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

**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**

UNIVERSITY OF DELAWARE

EXCHANGE

TEST SITE

All

Search (Alt+Q)

71,635.01 USD

Purchase Order

Requests

Receipts

Vouchers

Comments 1

Attachments 1

History

Show comments for

All

+

Enter your comment here detailing what you are changing

945 characters remaining

expand | clear

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

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.

☒

X

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

test

Purchase Order - UDB0000060

Comment Added

↶

Completed

Details

Supplier Status

Sent To Supplier

Supplier

Workflow Status

Completed

Workflow

Submitted

Powered by JAGGAER | Privacy Policy

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.

## 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

43



## 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 &lt;ud-mart@udel.edu&gt;

**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 SupplierSupplier  
W B MASON CO INC**Total (71,635.01 USD)** ▾

Subtotal	71,635.01
	<b>71,635.01</b>

**Related Documents** ▾[Requisitions: 3181392](#)**What's next?** ▾Workflow Status ● Completed

Workflow



Submitted



## Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

## Resources:

- [Procurement Services Website](#)
- [Understanding Access in UD Exchange](#)
- [Completing the Access Request Form](#)
- [Advanced Change Requests](#)
- [Closing and Cancelling POs](#)
- [Finding Suppliers and Supplier Information in UD Exchange](#)

