ELAWARE. EXCHANGE

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 bee 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.

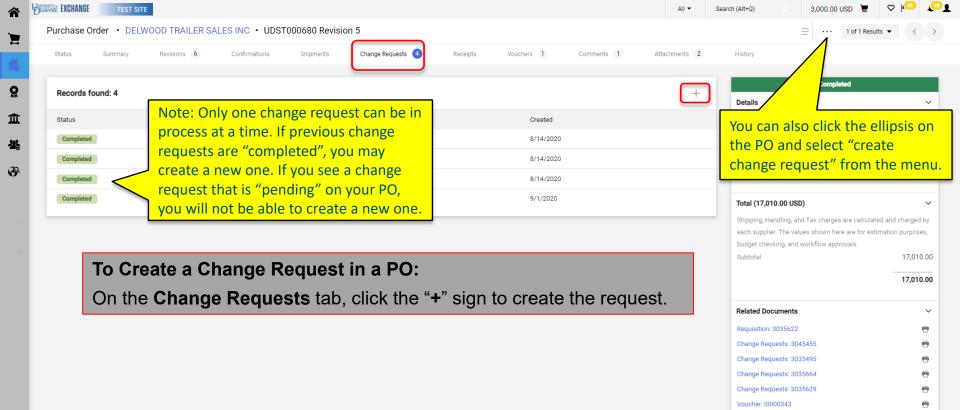


Changes for Non-Catalog Orders

- 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.







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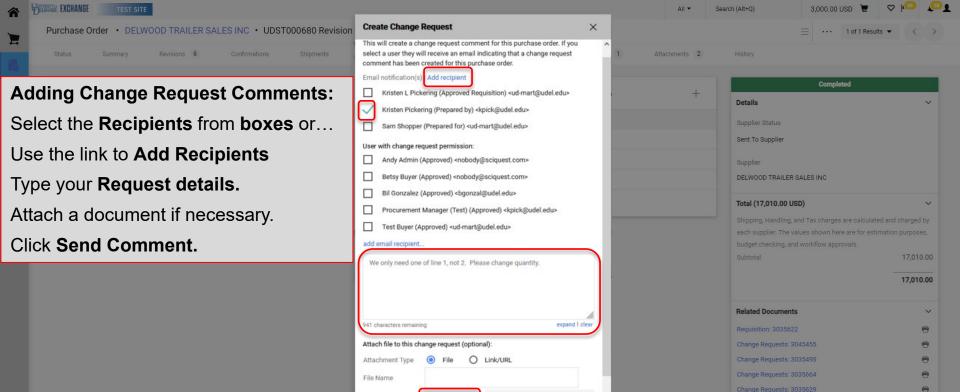
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What's next?

Workflow Status







Upload your file

Send Comment

Close

Choose File

File



What's next?

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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



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Questions:

procurement@udel.edu

Resources:

- Procurement Services Website
- <u>Creating and Processing a PO Change Request</u>
- Advanced Change Requests

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

