

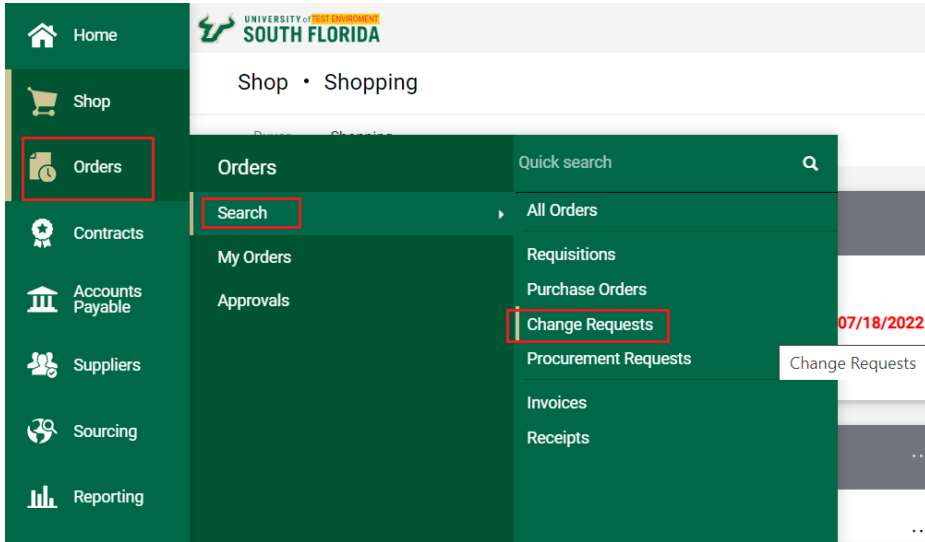
<b>Purpose:</b>	This manual outlines how to use the Change Request action to modify POs made for non-catalog items or services
<b>Navigation:</b>	(From the PO Page) Document Actions > Change Request
<b>Notes:</b>	University users able to use and submit Requisition Forms can also submit Change Requests. <b>Think of a Change Request as a separate document in Bull Marketplace. It will look like an editable version of the existing Purchase Order.</b> Some changes may only be made by a Procurement Agent. All Change Requests must pass successfully through workflow approval before they will be executed.

## Contents

General Information .....	2
Initiating a Change Request .....	3
Change Request – Increasing, decreasing, and/or changing the description of a line .....	4
Change Request – Changing the commodity code or chartfield for a line .....	8
Change Request – Cancelling Purchase Order Lines (or the entire order) .....	10
Change Request – Closing a Partially Fulfilled Line (or the Rest of a Partially Fulfilled Order) .....	13
Change Request - Adding Lines to a Purchase Order .....	16
All Other Miscellaneous Changes .....	18

## General Information

- 1.1 Change Requests are searchable in the Orders fly-out, by navigating Orders → Search → Change Requests



- 1.2 **Change Requests can only be created for:**
- ACTIVE PO's which have not been closed or canceled
  - PO's that have completed workflow – change requests cannot be created for PO's in error
  - Non-Punch Out PO's. These purchase orders will start with the letter "P" and have been requested with a Requisition Form. Change Requests against Punch Out orders will be rejected.
- 1.3 **Change Requests must:**
- Have an updated quote if change is being made to the items, price or quantities.
  - Follow guidelines for competition if increasing a PO will bypass a quote threshold.
- 1.4 **Change Requests Will:**
- Automatically adjust workflow approvals if commodity codes, business units or chart fields have changed
  - By default, revised POs will re-distribute to suppliers. Users have the option to NOT send an updated version of the PO to a supplier after the PO is revised. However, if price, quantity, or line descriptions have changed, an explanation for not doing so will be required.

## Initiating a Change Request

- 2.1 Navigate to the PO that needs to change. From the Summary Page, select **Change Request** from the drop-down menu arrow next to the PO number

The screenshot shows the University of South Florida procurement system interface. At the top, it displays 'UNIVERSITY OF SOUTH FLORIDA' and a search bar. Below that, the page title is 'Purchase Order • PT00001381 Revision 1'. A dropdown menu is open next to the PO number, with 'Create Change Request' highlighted in red. The main content area is divided into several sections: 'General Information' (PO/Reference No. PT00001381, Revision No. 1, Supplier Name A D MORGAN CORP, Address 716 N RENELLIE Drive), 'Shipping' (Ship To: UNIVERSITY OF SOUTH FLORIDA, ACCOUNTS PAYABLE, 4202 E. Fowler Ave., SVC1039, Tampa, FL 33620, United States), 'Billing/Payment' (Bill To: UNIVERSITY OF SOUTH FLORIDA, ACCOUNTS PAYABLE, 4202 E. Fowler Ave., SVC1039, Tampa, FL 33620, United States), and 'Details' (Supplier Status, Sent To Supplier, Supplier A D MORGAN CORP, Total (75.00 USD)).

- 2.2 Select specific users that need to be informed of the request. of the request, put in comments, and add relevant attachments. **The comment field is EXTREMELY important.** This space should outline the exact changes the user plans to request. **BE AS CLEAR AS POSSIBLE DESCRIBING THE CHANGE TO HELP EXPEDITE REVIEW.** In case the change is for something that the user cannot do directly, they need to inform the Procurement Agent what change must be made.

ONCE INFORMATION HAS BEEN PROVIDED CLICK **CREATE CHANGE REQUEST**

### 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):

- Constance Andrews (Approved Requisition) <tsmusf+sq@gmail.com >
- Jay Donoho (Prepared by, Prepared for) <tsmusf+sq@gmail.com >
- Julie McCoy (Approved Requisition) <tsmusf+sq@gmail.com >

add email recipient...

User with change request permission:

- Abhishek Yadav (Approved) <tsmusf+sq@gmail.com >
- Donna Washington (Approved) <tsmusf+sq@gmail.com >
- Maria Trujillo (Approved) <tsmusf+sq@gmail.com >
- Michael Olive (Approved) <michael.olive@risenow.com >
- Tela Williams (Approved) <tsmusf+sq@gmail.com >

add email recipient...

1000 characters remaining

Attach file to this change request (optional):

Attachment Type: File

File Name:

File:  No file selected.

## Change Request – Increasing, decreasing, and/or changing the description of a line

- 3.1 Outline the changes in the Change Request Comment field and Upload any supporting documentation. (In this case, changes to several lines will be performed. Note that the description clearly indicates what changes are being made to which lines.). Then click **CREATE CHANGE REQUEST**

**Change Request Reason**

Increase amount on line 1 from 10 to 15.  
 Decrease quantity on line 2 from 5 to 4.  
 Update description on line 4 to match description in the quote.

853 characters remaining expand | clear

**Attach file to this change request (optional):**

Attachment Type  File  Link/URL

---

File Name

File  Sample Quote.docx

- 3.2 The Change Request document will open. This will look similar to the PO, but will allow you to edit the information.

The screenshot shows the 'Change Requests' interface for University of South Florida. The main content area displays the 'Change Request Reason' with the following text: 'Increase amount on line 1 from 10 to 15. Decrease quantity on line 2 from 5 to 4. Update description on line 4 to match description in the quote.' Below this, there are sections for 'General', 'Shipping', and 'Billing' information. The 'Shipping' section lists 'UNIVERSITY OF SOUTH FLORIDA CENTRAL RECEIVING TAMPA CAMPUS' and the 'Billing' section lists 'UNIVERSITY OF SOUTH FLORIDA ACCOUNTS PAYABLE'. A right-hand sidebar contains a 'Draft' status, a warning 'Be aware of these issues.', and summary information including 'Total (75.00 USD)', 'Purchase Order: PT00001381', and 'Requisition: 3565893'.

3.3 Since changes are being made to the line values of the PO the Requisition Form will need to be updated. Scrolling down, the user can review the lines and select the Requisition Form attached. (If multiple Forms have been used make sure to select the correct form to edit.)

Selecting **REQUISITON FORM** will open an editable version of the form. Update the lines according to the comments you indicated before creating the Change Request.

**10 Items**

**A D MORGAN CORP · 10 Items · 75.00 USD**

**SUPPLIER DETAILS** 716 N RENELLIE DRIVE · 716 N RENELLIE Drive, TA...

Contract *no value* PO Number PT00001381

PO Clauses

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
Requisition Form					
1 Item line 1		LO	10.00	1	10.00

Contract: *no value*

**Draft**

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

Empty: PC Bus Unit  
Empty: Project / Activity

**Total (75.00 USD)**

**Related Documents**

Purchase Order: PT00001381  
Requisition: 3565893

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

Powered by JAGGAER | Privacy Policy

**UNIVERSITY OF SOUTH FLORIDA**

All Search (Alt+0) 149.00 USD

Shop Shopping View Forms

Back to Change Request

**Requisition Form**

Form Number 701143  
Purpose Procurement Request  
Status On Document

Suppliers ✓  
Form Fields ✓  
Requisition Information ✓  
**Line Information** ✓

Review and Submit

**Form Fields - Line Information**

Request Actions History ?

★ Response Is Required

**Instructions**

Information placed in this section will be used to fill in the lines of your requisition. Please fill in all items for each line.

All lines for **Blanket** and **Subagreement** orders must use a Quantity of 1 and a Unit of Measure of LO (Lot). One of these options must be selected to set all lines to receive by price amount only.

Please note that the commodity code choice will restrict which expense account codes may be used for your chartfield. If the item you are purchasing is a capital asset, you should use the account code choice beginning with 63XXX. If the item you are purchasing is not a capital asset, you should use the non-63XXX code.

**Requisition Lines**

How many lines will be on your requisition? \*

4

Line 1

Previous Save on Change Request Next

Line 1

Unit Price	15.00	USD	Quantity	1	Total	10.00 USD
Unit of Measure	LO - Lot					
Product Description	Item line 1 989 characters remaining					
Commodity Code	2313210000 - Other Office Supplies <span>Edit</span>					

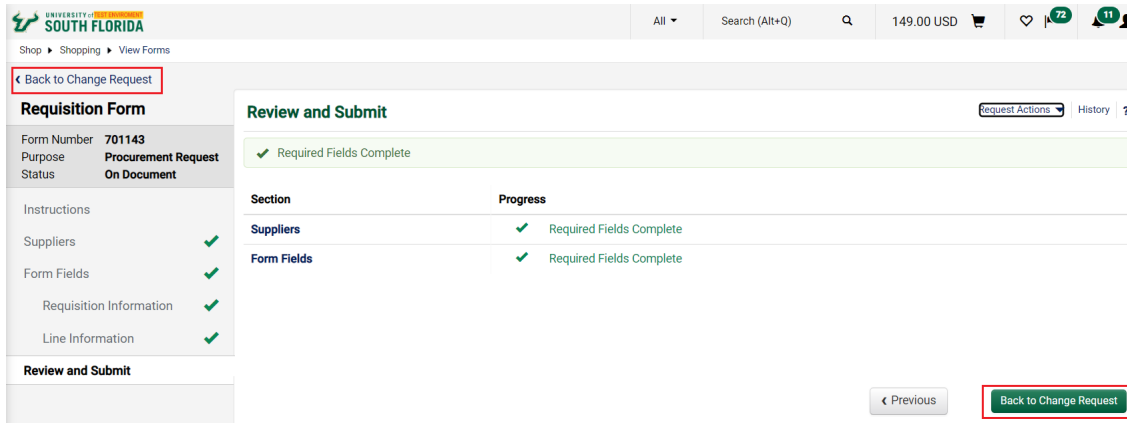
Line 2

Unit Price	5.00	USD	Quantity	4	Total	10.00 USD
Unit of Measure	EA - Each					
Product						

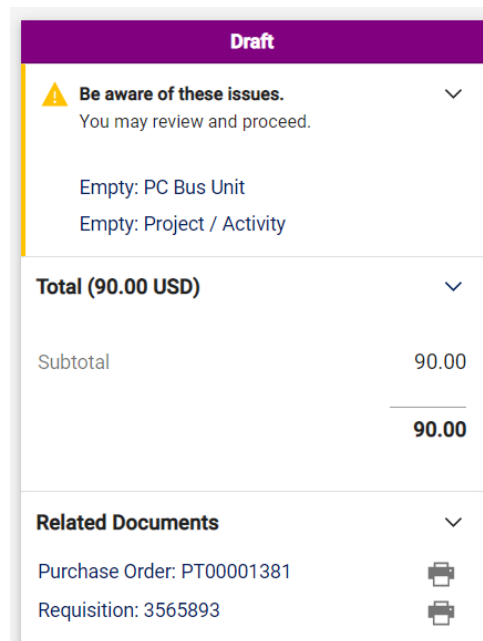
3.4 After making the changes, select “Save on Change Request” at the bottom of the page:



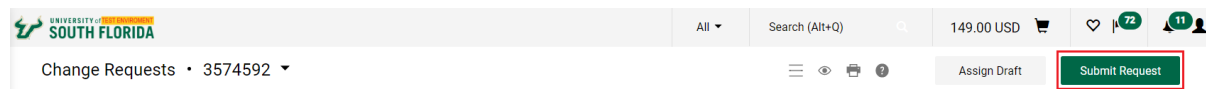
3.5 Once changes are complete choose “Back to Change Request” either at the top-left of the screen, or by pressing the green button on the “Review and Submit” section:



3.6 Back on the Change Request page, the user can review any errors or missing information on the right-hand side of the screen. There are also links to related documents.



3.7 If all errors are correct and you are finished with your changes, submit the Change Request by selecting “Submit Request” in the upper right-hand side of the screen.



3.8 Track the process of the request by reviewing the workflow on the Right Hand side of the screen.

**What's next for my order?** ▼

Next Step Wait for Initial PR Validation

Approvers There are no approvers

Workflow 📄 🖨️

Show skipped steps


**Draft**  
Active  
Paul Cleveland  
On behalf of: Shannon Ward

Start - Parallel Steps


**Initial PR Validation** ...  
Future

**Wait for Initial PR Validation** ...

3.9 After the Change Request is updated, the changes will show in the CR's history tab, and the PO itself will show a new Revision number.

 UNIVERSITY of TEST ENVIRONMENT  
**SOUTH FLORIDA**

Purchase Order • PT00001381 Revision 1 ▼

 UNIVERSITY of TEST ENVIRONMENT  
**SOUTH FLORIDA** All ▼ Search (Alt+Q) 🔍

Change Requests • 3574592 ▼ ☰ 🖨️ ?

Summary PO Preview External Communication Comments 1 Attachments 1 **History**

User  🔍

Filter Clear All Filters Export CSV

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
Line 1	7/26/2022 5:13:32 PM	Paul Cleveland	Requisition	modified	Unit Price	10.00	15.00	Price changed automatically due to an update to Price Source:Manual

## Change Request – Changing the commodity code or chartfield for a line

4.1 Changes to commodity and chart fields can only be done to PO lines which have not yet been invoiced and/or received against. If there are unmatched invoices or receipts, they must be deleted before a change request can be processed.

To make changes to a PO where there are partial or full matches of invoices and receipts you will either need to:

1. Add a new line (and decrease the previous lines down to the invoiced amount) OR
2. Close the current PO and submit a new requisition for the remaining amount.

Because neither change is relevant to the supplier fulfilling the order, a comment can be made requesting that the revised PO not be sent back out.

UNIVERSITY of SOUTH FLORIDA

All Search (Alt+Q)

Change Requests • 3574760

Summary PO Preview External Communication Comments 1 Attachments History

Changes will be sent to the Supplier.

**Change Request Reason**

Reason Updating the commodity code and chartfield information on line 1.

Please do not resend PO to supplier; changes are internal only.

4.2 Outline the changes in the Change Request Comment field and Upload any supporting documentation. (In this case, changes to several lines will be performed. Note that the description clearly indicates what changes are being made to which lines.). Then click **CREATE CHANGE REQUEST**

4.3 To change **COMMODITY CODE** make your changes directly on the summary page of the Change Request. Scroll down to the line you want to change and use the Edit button. Changing the code here will also update the Requisition Form. (Changes can be made on the requisition form, but this is the easiest way)

1	Item line 1	LO	10.00	1	10.00	...
ITEM DETAILS						
Commodity Code		Tag Number				
2313210000 / Other Office Supplies		no value				
External Note		Internal Note				
no value		no value				
		Internal Attachments				
		Add				
		PO Clauses				
		Add				



**Edit Line 1: Item Details**

Requisition Form

Contract:

1	Item line 1	LO	10.00	Qty: 1	10.00
---	-------------	----	-------	--------	-------

Commodity Code \*  Other Office Supplies

Tag Number *no value*

External Note

Internal Note

PO Clauses

2	Item line 2	EA	5.00	Qty: 2	10.00
---	-------------	----	------	--------	-------

Commodity Code \*

Tag Number *no value*

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

4.4 To change the **CHARTFIELD**, navigate to the Accounting Codes section. Each line will have an edit button that will allow the user to update the chartfield string.

ACCOUNTING CODES Values have been overridden for this line

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
USF01	TPA	10000	53000	025300	000000	0000000	<i>no value</i>	<i>no value</i>	<i>no value</i>
USF	USF TAMPA	GENERAL REVENUE	SUPPLY/EQUIP GENERAL OFFICE	POST OFFICE	DEFAULT PRODUCT	DEFAULT INITIATIVE			

If the PO only has one line, or has its chartfield string at a header level (applying the same chartfield to all lines), the user may need to open up the line-level accounting codes to get them to appear at the line level. This can be done by clicking the **⋮** icon and selecting "Accounting Codes"

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Item line 1	LO	10.00	1	10.00

Requisition Form

Contract: *no value*

ITEM DETAILS

Commodity Code 2313210000 / Other Office Supplies

Tag Number *no value*

External Note *no value*

Internal Note *no value*

Override

- General
- Accounting Codes**

Be aware of You may rev

Empty: PC I

Empty: Proj

Related Docum

4.5 If you are finished with your changes, submit the Change Request by selecting "Submit Request" in the upper right-hand side of the screen.

UNIVERSITY OF SOUTH FLORIDA

Change Requests • 3574592

149.00 USD

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

## Change Request – Cancelling Purchase Order Lines (or the entire order)

- 5.1 **Purchase Orders lines can be cancelled only when no items have been received or invoiced.** If all lines of a PO are cancelled, the entire PO will be considered cancelled.

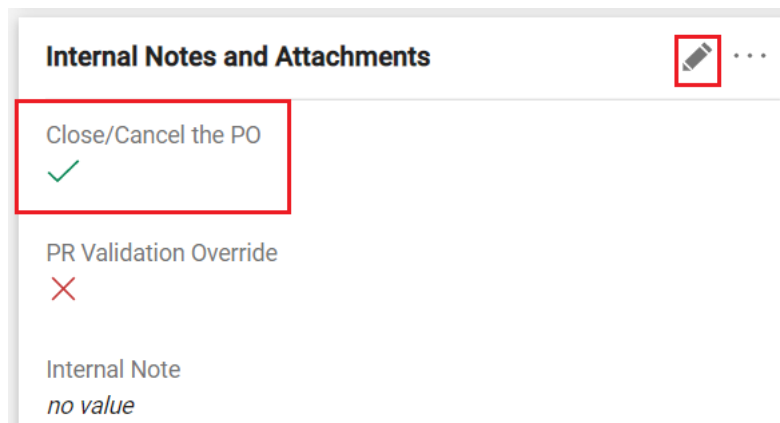
If a user is requesting a cancellation, **the revised PO must be resent to the supplier.** This will ensure that the order will not be filled later on. The only exception is if the original PO was not sent to the supplier.

**If an order has been partly fulfilled, please refer to the section on closing a Purchase Order instead.**

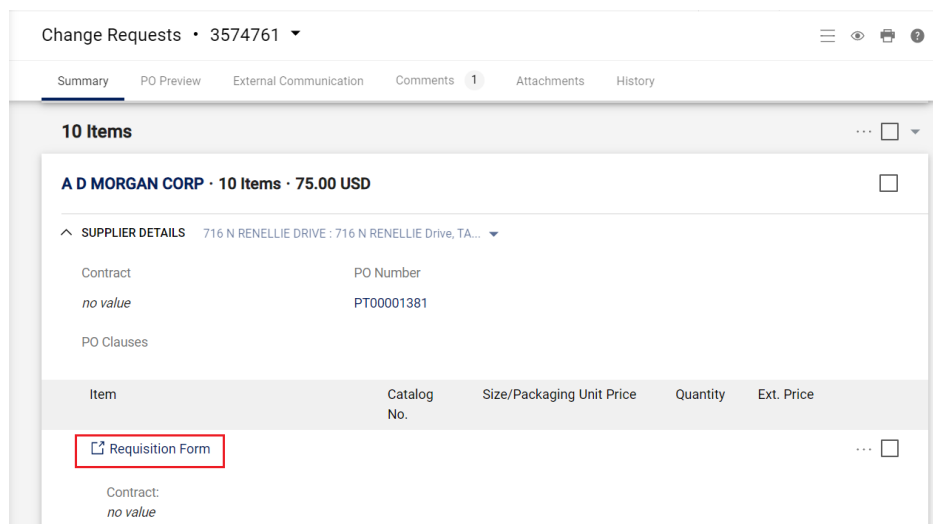
**Cancellation is a permanent status.** Once a cancellation Change Request is processed and the revised PO is exported to FAST, the line(s) cannot be re-opened and payments cannot be made. A new requisition will need to be created to process any payments.

- 5.2 Outline the changes in the Change Request Comment field and Upload any supporting documentation. (In this case, changes to several lines will be performed. Note that the description clearly indicates what changes are being made to which lines.). Then click **CREATE CHANGE REQUEST**

- 5.3 **TO CANCEL A LINE**, scroll down to the Internal Notes and Attachments section of the Change Request and click the edit button to check the box next to “Close/Cancel the PO”



- 5.4 Scroll down to the lines of the change request and select the Requisition Form.



Change Requests · 3574761

Summary PO Preview External Communication Comments 1 Attachments History

10 Items

A D MORGAN CORP · 10 Items · 75.00 USD

^ SUPPLIER DETAILS 716 N RENELLIE DRIVE : 716 N RENELLIE Drive, TA...

Contract	PO Number
no value	PT00001381

PO Clauses

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
------	-------------	----------------	------------	----------	------------

Requisition Form

Contract: no value

5.5 Navigate to the Line Information page and reduce the quantity to 0. Once complete, click the green “Save Progress” button down at the bottom. Remember: **only a line without any receipts or invoices may be cancelled**. If a receipt or invoice is applied against that line, they must be deleted first.

The screenshot shows the 'Requisition Form' for Form Number 701145, Purpose Procurement Request, and Status On Document. The left sidebar shows a progress indicator with 'Line Information' highlighted in red. The main content area shows 'Line 2' with a Unit Price of 5.00 USD and a Quantity of 0. The 'Save on Change Request' button is visible at the bottom right.





5.8 Save the Form and select to “Back to Change Request” in the upper left-hand corner of the screen.

The screenshot shows the 'Requisition Form' interface with the 'Back to Change Request' button highlighted in red in the upper left-hand corner. The progress indicator on the left shows 'Line Information' as completed.

5.9 The second line will no longer show in the Lines section. If you are finished with your changes, submit the Change Request by selecting “Submit Request” in the upper right-hand side of the screen. **A revised copy should be sent to the supplier.**

The screenshot shows the top navigation bar of the Requisition Form. The 'Submit Request' button is highlighted in red in the upper right-hand side of the screen. The total amount shown is 149.00 USD.

- 5.10 Once the Change Request passes its approvals, the PO will be revised to show that line 2 has been cancelled. This will also cancel the line in FAST and release the encumbrance.
- 5.11 **TO CLOSE AN ENTIRE PO:** submit a change request with the comment stating the entire order is to be cancelled. Only a Procurement Agent has the ability to cancel the entire order. After the Change Request is fully approved, the Procurement Agent will cancel the order and a notice will be sent to the supplier. The PO itself will show as “cancelled” when searched for.

 C000000149	VWR FUNDING INC	9/26/2019 1:37 PM	2772929	Shannon Ward	Sent	No Matches	889.41 USD	<input type="checkbox"/>
 P000000302	ABCAM INC	9/26/2019 11:17 AM	2772747	Shannon Ward	 Cancelled	No Matches	0.00 USD	<input type="checkbox"/>
 C000000148	OFFICE DEPOT INC	9/26/2019 10:39 AM	2772682	Shannon Ward	Sent	No Matches	144.60 USD	<input type="checkbox"/>

## Change Request – Closing a Partially Fulfilled Line (or the Rest of a Partially Fulfilled Order)

6.1 If a line has been partially or fully received or invoiced it cannot be cancelled. It can only be closed.

**Closing a PO or PO line is a FINAL action.** After a PO or PO line has been closed and the updates have been sent to FAST, the lines may no longer be opened. If additional items must be purchased or paid for, they must be entered on a new Purchase Order.

**If the line is partially received or partially invoiced and the invoice is unmatched** you can reduce the line to the remaining partial amount, however the line will not actually close and release the encumbrance until the payment is distributed.

**To close a line,** the quantity of the line must be reduced to the amount that has been fulfilled. This will flip the status to fully matched, which will close the line after the matched portion has been paid. Even before that point, the line will unencumber the unfulfilled amount.

In this example, the PO has two lines. Line 2 has a quantity of 3, and 1 has been received and invoiced (partially matched). Reducing the quantity of line 2 from 3 to 1 will unencumber the funding for those two remaining items, and flip the line from partially matched to fully matched. Once payment is disbursed, the line will automatically close.

Status Summary Revisions 1 Confirmations Shipments Change Requests 1 Receipts 1 Invoices 1 Comments

Records found: 1, Totaling: 5.83 USD

Invoice No. ↓	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total
VT002180 ↗	22.2APTest15Rick	6/28/2022	7/28/2022	Invoice	Payable	5.83 USD

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	Rel 22.2 - Line 1 - Addr - KM		3.33 USD	5 EA	16.65 USD	4 / 13.32 USD 1 / 3.33 USD	Open Net Invoiced
2	Rel 22.2 - Line 2 - Addr - KM		2.50 USD	3 EA	7.50 USD	2 / 5.00 USD 1 / 2.50 USD	Open Net Invoiced

6.2 Outline the changes in the Change Request Comment field and Upload any supporting documentation. (In this case, changes to several lines will be performed. Note that the description clearly indicates what changes are being made to which lines.) Then click **CREATE CHANGE REQUEST**

6.3 On the Change Order, navigate to the **REQUISITION FORM** to make your changes. Navigate to the Line Information section. Reduce this quantity to the desired amount. NOTE: The change request summary will show the original quantity requested on the PO, regardless of the items received. **TAKE CARE NOT TO REDUCE A QUANTITY BELOW WHAT HAS BEEN RECEIVED OR INVOICED.**

Summary PO Preview External Communication Comments 1 Attachments History

**IRON MOUNTAIN INC · 8 Items · 24.15 USD**

^ SUPPLIER DETAILS PO BOX 27129 : PO BOX 27129, NEW YORK, New York...

Contract PO Number  
no value PT00001379

PO Clauses

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
<div style="border: 1px solid red; padding: 2px;">Requisition Form</div>					

Contract: no value

**UNIVERSITY of SOUTH FLORIDA**

Shop > Shopping > View Forms

< Back to Change Request

**Requisition Form**

Form Number **701146**  
Purpose **Procurement Request**  
Status **On Document**

Instructions

Suppliers

Form Fields

Requisition Information

Line Information

Review and Submit

Line 2

Unit Price	2.50	USD	Quantity	<div style="border: 1px solid red; padding: 2px;">1</div>	Total	7.50 USD
------------	------	-----	----------	---	-------	----------

Unit of Measure EA - Each

Product Description Rel 22.2 - Line 2 - Addr - KM  
971 characters remaining

Commodity Code 2915000000 - General Utilities

- 6.4 Save your changes with the “Save on Change Request” button at the bottom of the Form, and select “Back to Change Request” in the upper-left hand corner of the Form.
- 6.5 If you are finished with your changes, submit the Change Request by selecting “Submit Request” in the upper right-hand side of the screen.



**UNIVERSITY of SOUTH FLORIDA** All Search (Alt+Q) 149.00 USD


Change Requests · 3574592 


Submit Request

- 6.6 **The updated PO should be resent to the supplier so they know not to fulfill the rest of the order. If this should not be resent, make sure you include that information in your Change Request comment, along with an explanation as to why.**
- 6.7 Once workflow is complete the lines will change to “fully matched” and will close in FAST to release the encumbrance.

6.8 **To close the entire PO rather than individual lines**, a change request can be entered with a comment requesting that the remainder of the PO be closed out. The user should also check the box “Close/Cancel the PO” in the Internal Notes and Attachments section. The change request will still go through the normal workflow route, but after the request is approved and the PO revised, a Procurement Agent will manually close the PO with a role-exclusive option.

**Internal Notes and Attachments**  

Close/Cancel the PO 

PR Validation Override 

Internal Note  
*no value*

## Change Request - Adding Lines to a Purchase Order

- 7.1 Additional lines can be added if a PO is open and in Completed workflow status. Adding lines follows similar rules to increasing a PO; an updated quote showing the new lines should be included, and guidelines for order thresholds must be followed. **The new lines must be part of the original order; adding lines should NOT be used to try to circumvent our After the Fact reporting process.**
- 7.2 If the original PO had chartfields at a header level, the new lines will inherit those chartfields. Note: If a Chartfield is at a header level the commodity code of the new line must either be allowable under the current account code, or lines must be manually updated.
- 7.3 Lines can only be added to EXISTING requisition forms associated with the PO that have fewer than 20 lines.
- 7.4 Outline the changes in the Change Request Comment field and Upload any supporting documentation. (In this case, changes to several lines will be performed. Note that the description clearly indicates what changes are being made to which lines.) Then click **CREATE CHANGE REQUEST**
- 7.5 Lines must be added on the **REQUISITION FORM**. Go into the Line Information section and change the number of lines. Go to the newly created line 5 and input the required information (quantity, unit price, unit of measure, description, and commodity code). Click the green “Save on Change Request” button at the bottom of the screen.

The screenshot displays the University of South Florida Procurement System interface. The top navigation bar includes the university logo, search functionality, and user information. The main content area is titled 'Requisition Form' and shows details for Form Number 701167, Purpose Procurement Request, and Status On Document. The 'Line Information' section is active, showing a list of lines (1-19) with line 5 selected. Below this, the 'Line 5' details are shown, including Unit Price (50 USD), Quantity (1), Unit of Measure (EA - Each), Product Description (New item added to the order), and Commodity Code (2313210000 - Other Office Supplies). A green 'Save on Change Request' button is highlighted at the bottom.



7.6 Select “Back to Change Request” at the top-left of the form request to return to the change request screen.

UNIVERSITY of SOUTH FLORIDA

Shop ▶ Shopping ▶ View Forms

[← Back to Change Request](#)

### Requisition Form

Form Number **701167**  
 Purpose **Procurement Request**  
 Status **On Document**

Instructions


Suppliers ✓

Form Fields ✓

Requisition Information ✓

**Line Information** ✓

Review and Submit

7.7 If your chartfield string is not at the header level, you will need to add the chartfield information to the line’s Accounting Codes section. Note the missing required fields on the right. Scroll down to the new line and click the edit  button to add the chartfield string.

5 New item added to the order EA 50.00 1 50.00 ...



ITEM DETAILS

Commodity Code 2313210000 / Other Office Supplies Tag Number *no value*

External Note *no value* Internal Note *no value*

Internal Attachments Add

PO Clauses Add

ACCOUNTING CODES Values have been overridden for this line  

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
USF01	<i>no value</i>	<i>no value</i>	53000	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>
USF			SUPPLY/EQUIP GENERAL						

**Draft**

**Correct these issues.** You are unable to proceed until addressed.

- Required: Oper Unit
- Required: Fund
- Required: Dept
- Required: Product
- Required: Initiative

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




- Empty: PC Bus Unit
- Empty: Project / Activity

**Total (125.00 USD)**

Subtotal 125.00

7.8 If you are finished with your changes, submit the Change Request by selecting “Submit Request” in the upper right-hand side of the screen.

UNIVERSITY of SOUTH FLORIDA

All Search (Alt+Q) 149.00 USD   72  11

Change Requests • 3574592

Assign Draft **Submit Request**

## All Other Miscellaneous Changes

There are a large number of other changes that may be requested to Purchase Orders. Most of these will be done by submitting a Change Request with the specific request in the Comment. However, if a user is able to make the change themselves, we expect them to do so rather than having our Procurement Agents make the changes manually. Some situations, and how to deal with them, are discussed below.

- 9.1 **Updating Payment or Shipping Terms:** If payment or shipping terms must be changed on a PO, the user should submit a change request and update the terms in the requisition form request. These Terms are found in the Requisition Information section of the form. Please keep in mind that we only allow specific terms. If a term is selected that is not allowed, the change request will be returned.

▼ **Payment and Shipping Terms**

Do you need to change our Payment Terms (default: Net30) or Shipping Terms (default: F.O.B Destination)? \*

Yes  No

Please describe the new Payment or Shipping Terms

- 9.2 **Changing a PO's receiving type (quantity vs. amount only):** A PO can have its receiving type changed in very select situations:

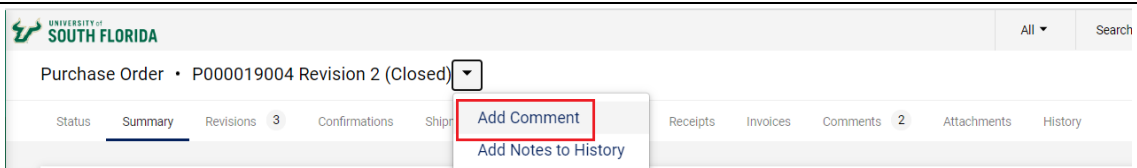
- No receipts or invoices can have been made against the PO; once there is a match, the receiving type cannot be changed.
- The lines must adhere to our requirements, specifically in regard to Amount Only POs. This means that, generally speaking:
  - There can only be a single line on the PO (except on subagreements and some limited exceptions)
  - Quantity must be 1
  - Unit of Measure must be LOT
- Change request must explain the need to change the receiving type, and the user will make the change by checking/unchecking the "Blanket Purchase Order" or "Subagreement" box in the Requisition Information section of the requisition form.

Does this requisition involve any of the following?

<input type="checkbox"/> Construction or renovation of Tampa buildings/grounds	<input type="checkbox"/> Use of a USF logo	<input type="checkbox"/> Services provided by an Independent Contractor	<input type="checkbox"/> Perquisites for employees
<input type="checkbox"/> Departmental copier leases	<input type="checkbox"/> Non-standard technology requiring UTSB approval	<input type="checkbox"/> Cell phone/cell data/computer air cards	<input type="checkbox"/> Blanket Purchase Order
<input type="checkbox"/> Purchase of Vehicles	<input checked="" type="checkbox"/> Subagreements	<input type="checkbox"/> Purchase of Assets	

- 9.3 **Reopening closed POs:** A PO may be reopened ONLY if it was manually closed by a Procurement Agent. A PO cannot be reopened if closed by fully matching and paying out. It cannot be reopened if it was cancelled.

Request a PO be opened by adding a comment to the PO and add the Procurement Agent as an email recipient to request the PO be reopened.



- 9.4 **Changing the Supplier or Supplier Fulfillment address:** These changes are not able to be made. If the wrong supplier or the wrong fulfillment address were selected and need to be changed, the PO must be cancelled and a new requisition with the correct supplier and/or address submitted instead.