CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Quick Reference Guide

Purchase Order Change Request

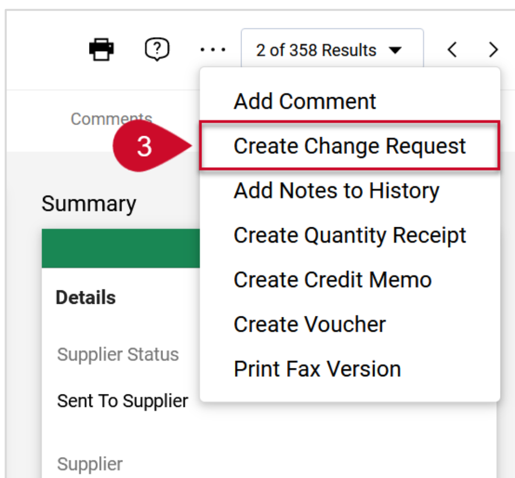
Learn how to create a Change Request for a purchase order. Below are some key notes about the Purchase Order (PO) Change Request process:

- Use a change request to adjust chartfields, price, quantity, or other items.
- This process routes the changes through purchase requisition (PR) workflow approvals, including Procurement.
- Changes that affect the supplier should be given extra attention and be coordinated directly with the supplier.
- **Important:** Before creating a change request, it is necessary to review the current status of the purchase order. If there is any activity on the PO, such as vouchers, payments or receipts, a change may not be possible. In some cases, there may be additional instructions on how to make the change. Coordinate with your Procurement department for these situations.

Create a Purchase Order Change Request

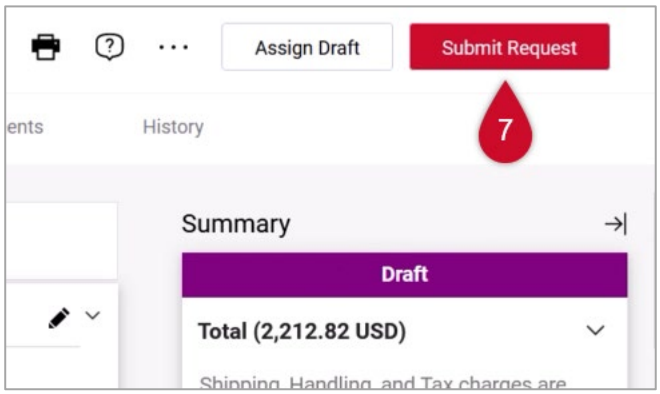
Follow the steps below to create a Purchase Order Change Request:

1. Navigate to **Orders > Search > Purchase Orders**.
2. Locate the purchase order you want to update.
3. Select the **Document Actions** drop-down menu and select **Create Change Request**.



4. In the Create Change Request window,
   a. Select or enter the emails of the individuals you would like to notify.
   b. Enter the reason for the change request.
   c. Upload or link to a supporting document if needed.
   d. Select **Create Change Request**.

5. The change request document looks like the order. Make changes directly to the document what you want to change. (See important note above.) Click a pencil icon to edit a section or choose a drop-down selection for other line actions.
6. Add additional comments as necessary to communicate what is changing.
7. When done editing, select **Submit Request**.



Note: The change request routes through workflow. Once approved, it will merge with the current PO. The revised PO be sent to the supplier and CFS if applicable.

Checking the Status of a Change Request

1. Select the **History** tab in a purchase order where there has been a change request made.
2. Expand the **Summary** panel to check whether the change request was sent to CFS and completed.