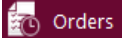


Change Request Quick Reference Guide

04/02/2020

*Note: Change Requests are **not** to be used for Catalog Orders.*

Open the Purchase Order (PO)


- 1) From AggieMart home → Click the **Orders**  icon → Click **Search** → Enter the PO number in the **Quick search** box → Press **Enter**.
- 2) Click the **PO number** in the search results to open the PO.

Initiate a Change Request


- 1) Within the PO → Click the **Purchase Order**  drop-down → Select **Create Change Request**.
- 2) A pop-up window appears → Click **Create Change Request** to open a draft Change Request.

Change the Accounting Date

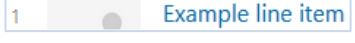
Note: Change Requests will be rejected by the system if the Accounting Date is in a closed accounting period. Check the accounting date and change it if necessary.

- 1) Expand the **Billing** section → Check the **Accounting Date**.
- 2) If the Accounting Date needs adjustment → Click the **Edit**  icon.
- 3) Change the date to the current date → Click **Save Changes**.

Funding Changes

- 1) Scroll to the **Funding** section → Click the **Edit**  icon → make the necessary changes.
- 2) Click **Save Changes**.

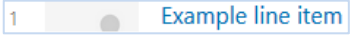
Line Changes – Quantity and/or Cost

- 1) Scroll down to the **Items** section → Click on the **line item description** .
- 2) In the pop-up window → make **Quantity** and/or **Price Estimate** changes → Click **Save**.
- 3) Add **Attachments** (Internal and/or External) to the line if needed.

Line Changes – Add a Line

- 1) In the **Items** section → Click on the **Vendor name**, *example:* , to view a drop-down menu → Click **Add Non-Catalog Item**.
- 2) Enter the information for the new item → Click **Save and Close**.

Line Changes – Remove a Line


- 1) In the **Items** section → Click on the **line item description** .
- 2) Change the **Price Estimate** to “0.00” → Click **Save**.

Note: Once submitted, the Change Request will route to Procurement Services so they can remove the Line from the PO.

Cancel PO or Close PO

Note: PO's can only be cancelled if they meet these conditions:

- Not Fulfilled
- No Receives
- No Invoices

- 1) Click the **Change Requests**  drop-down menu.
- 2) Click **Add Comment** → Explain why you want to cancel or close the PO → Click **Add Comment**.

Note: Once submitted, the Change Request will route to Procurement Services.

Submit the Change Request

- 1) When finished with changes → Click **Submit Request**  or **Assign Draft** 