CHANGE ORDER TYPES

- Once a Purchase Order is issued to a supplier, it can only be changed by submitting a change order or creating a new requisition. For more information regarding when a Change Order should be initiated vs. a New Order, click here.
- Increases consider whether or not the increase is to accommodate continued future use of the Purchase Order (PO) OR to accommodate a final invoice payment.
- Decreases consider whether or not there is previous invoice activity on the PO. You cannot decrease a PO or PO line below what has already been paid to a supplier.
- Chartfield Changes consider previous invoice activity, complexity of chartfields on the original PO, and the impact of issuing a new PO. Chartfield changes can only accommodate future activity, invoice activity that has already occurred against the original chartfield must be resolved via a journal voucher.

LET'S GET STARTED

1. To initiate a change order request, click the Change Order form found in the Order Forms section of the i-Buy NYU Homepage.

2. A separate window will open with the change order form. Tip: to easily access information from the original PO, open another instance of i-Buy NYU in a separate tab and toggle between the two windows.

The form is designed with required fields (shown in bold) and optional fields.

1. Enter the PO Number and Supplier Name. Ensure the PO number and Supplier name correspond to the PO you wish to change.

2. Enter in a Reason for Change. This is your opportunity to provide the information the Procurement Team needs to review and process your request (example: This change order increases Line 1 of the PO from $1,000 to $3,000 to accommodate additional quantity needed).

3. Details of Change is an additional text to further elaborate the requirements of the change order request. (example: The additional $2,000 should be allocated to the following new org: 19600)

4. Select a Type of Change from the dropdown menu. Options include: Change Chartfield Only, Decrease Amount, Increase Amount, or Multiple Changes. This dropdown menu allows the workflow to properly route the change order request.
REQUESTING A CHANGE ORDER

Select the **Commodity Code** consistent with the original PO. This ensures the appropriate Procurement Buyer will receive the request.

Depending on the type of change you will be required to enter in the **Increase Amount**, OR **Decrease Amount**. Please Note: the **amount of the change** should be entered. The **new total** of the PO should be entered in the **PO Total** field.

Enter a **PO Line Number**, if appropriate. If multiple lines are changing, the **Details of Change** field should be used to explain the multiple line requirements.

The **chartfields** from the original PO should be entered in the **Chartfields strings to be changed** field. If the chartfields from the original PO exceeds the three provided rows, the **Details of Change** field should be used instead.

Once all necessary fields have been completed, Navigate to the **Available Actions** drop down menu, select **Add to New Shopping Cart**. This will deposit your change order request into a draft cart. You will then be directed through the standard checkout process.

### IMPORTANT NOTE:
If other miscellaneous items are already in your cart (e.g. Punchout items, Non-Catalog Request, Catalog Order) the following warning message will appear:

To resolve, you must clear your cart contents OR create a new cart by navigating to **Shop > My Carts and Orders > View Draft Shopping Carts > Create Shopping Cart**

### CHANGE ORDER CHECKOUT PROCESS

1. Click the View Draft button to begin the checkout process.

2. The system will then walk you through a 5-step validation process. The first step involves Shipping. Upon your initial requisition effort, you will be prompted to add a shipping address to your profile. If your shipping address has already been defaulted, proceed to Step 5 by clicking **Next**. If not, click **Want to use a different address? Click here to add addresses to your profile**. Then click **Select Addresses for Profile** and search the directory using either the building name or street number.
REQUESTING A CHANGE ORDER

CHANGE ORDER CHECKOUT PROCESS

3. Once you have selected the desired address, add your **Floor** and **Room** and click **Save**. This will ensure future order requests automatically default your preferred shipping address information. Note: you will retain the ability to change the shipping information as needed.

4. Navigate back to the checkout screen by clicking the cart icon located in the top right menu and then click **Checkout**.

5. The **Required Delivery Date** field allows you to indicate a suggested target date for goods or services to be delivered.

6. Billing information is defaulted to the University’s preferred Accounts Payable address.

7. Navigate to the Chartfields section and click **edit** to enter chartfield values.

8. Use the original PO values if chartfield values are not changing. Use the new chartfield values for any change orders related to chartfield changes.

9. Your chartfield values may contain Fund, Department, Program, Project and Budget Year. Upon submission of the requisition, the chartfield you have provided will be validated against FAME accounting information to ensure a valid chartfield string and availability of funds. If known, chartfield values can be entered directly into each field, however, clicking the “Select” button allows for the selection from a list of all NYU chartfield values. Once the values have been entered, click **Save** and **Next**.

10. The **Notes** section is divided into two fields to allow you to include NYU specific notes to future reviewers (e.g. Department Approvers, Procurement, Accounts Payable) via the **Internal Notes** OR supplier specific notes as part of the PO document via **External Notes**. Click **Edit**, to add relevant notes to the applicable area and then **Save changes**. Proceed to the final step by clicking **Next**.

11. Order Review offers the user a final summary review prior to submitting the order for processing. If any of the previous validation steps have not been completed, the user will not be able to proceed. Otherwise, you can click **Place Order**.

12. After clicking **Place Order**, you should be presented with a Confirmation screen that summarizes your request and identifies your change order requisition number. You have the ability to observe the change order requests approval status among several other search options as noted below.
1. The Shopper role does not possess the ability to “Place an order”. As a result, Shopper’s MUST assign shopping carts to a known department requestor. Not sure who your department’s requestor is? Use the Requestor Look-up Tool.

2. Assigning a cart can also be utilized to aggregate multiple items for different users, while still consolidating the request to one order.

3. Clicking the Assign Shopping Cart button during the checkout process allows the user to search the NYU directory for their Requestor, add them to their profile to expedite future efforts, and add a note to the assignee which will be delivered to their email via a system notification. Once the requisition has been approved, the Procurement team will review and process further.

4. To view the status of the requisition, use the Document Search or Quick Search feature to access the requisition and click on the PR Approvals tab.