

1. PO Change / Cancel Process

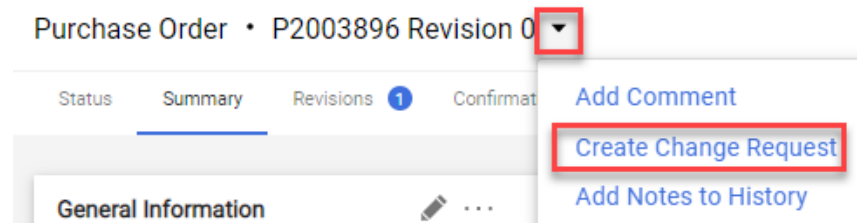
- Changes can be made to an existing Open non-catalog PO.
- Changes are usually processed in Banner within 24 to 48 hours from submission.
- You will receive an email notification once the change is complete.
- **Punchout order changes cannot be communicated to the supplier.** Please contact them directly to request a change or line item cancellation.
- You will not be able to make a change on a **fully invoiced PO** using this process. Please contact Procurement Services if you have an order that is **fully invoiced** in Jaggaer, however, still open in Banner.

2. Do not submit a change request if:

- Your change is less than 5% of the total value of the PO or \$50 per line item. Instead, add a comment to the PO indicating your approval for payment.
- You are decreasing the value of the PO. The PO will be paid and any remaining funds will be released.
- You are adding freight or shipping charges that are under \$500. The freight or shipping charges will be paid.
- You are changing the FOAPAL on **more than 3 line items**. Instead, complete a journal voucher to transfer the funds.
- You are requesting to remove an encumbrance. Instead, email acctpay@nd.edu and ask them to release the balance..

3. Open existing PO

- Select Create Change Request under the drop down menu



4. Change Request Dialog box

- The change request will automatically go to your financial approvers. You don't need to select anyone's name from the list
- You have the option to add more email recipients.

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.

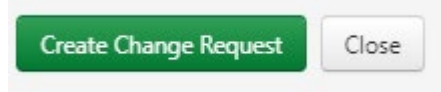
Email notification(s):

- Diana Kennedy (Approved Requisition) <kennedy.75@nd.edu>
- [Redacted]


[add email recipient...](#)

5. Add the PO Change details

- Click **Create Change Request** button



- Click the **pencil** in the top right corner of the change request reason field
- Add the change information in the **comment** box. Please describe the change in detail.

Change Request Reason 

Reason *no value*


6. Change the Existing Line Details

- The system will open a change request form so you can make your edits.
- Click the line item description to change the line Description, Catalog #, Unit Price or Quantity

Wygant Floral Co - 3 Items - 75.00 USD

SUPPLIER DETAILS Purchasing 1 : 327 Lincoln Way W

PO Number **P1974971**

Item
1 Floral Arrangements 

7. Line Item Details

- The fields become available for any changes needed.




Item

Catalog No.	Product Description	Quantity	Unit Price
n/a	Floral Arrangements	3	25.00

235 characters remaining

8. FOAPAL Change

- Under the Codes FOAPAL section of the PO, select the Pencil in the upper right of that section to edit the FOAPAL fields.

Codes and FOAPAL   

Accounting Codes (FOAPAL)

Chart	Fund
1 Notre Dame	100000 Educational and General

Custom Codes



9. Change FOAPAL Cont.

- You can change the existing FOAPAL or add additional FOAPAL's
- To add additional FOAPAL lines (split), click the "+" at the end

Edit Codes And FOAPAL

Accounting Codes (FOAPAL)

Chart	Fund	
1 Notre Dame	100000	+ ✓ ♥

10. Add a line(s) to the PO

- If you need to add any lines to the PO, click the **ellipses** (3 dots) above the first line item and choose **Add Non-Catalog Item**

11. Add line details

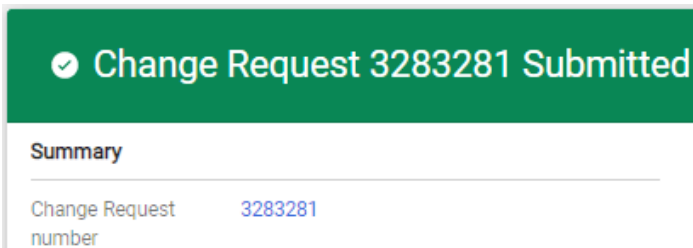
- A non-catalog form will open
- Add the line item details in the form
- Click save or save and add another line item

12. Changes complete

- After all changes are complete, you will click **Submit Request** in the upper right of the change request form.

13. PO Change Workflow

- The PO Change will process through the appropriate workflow based on the changes you made.
- Approvers will be notified to approve the change request
- Procurement Services will be notified of the change request and make the appropriate changes in Banner.



14. Cancel the PO

- The process to Cancel a PO follow steps 3-7.
- In step 5, the comment box of the PO Change Request, enter "Cancel PO"
- In the line item details section, check the box at the end of the line items.
- Scroll up to the check box above the items (just above the name of the vendor) and click the blue arrow to open more options.
- Click **Cancel Selected Items**
- Click **Submit Request** button.

