

## 1. PO Change / Cancel Process

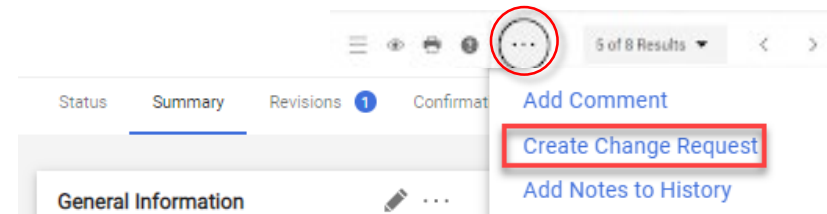
- Changes can be made to an existing Open non-catalog PO.
- Changes are usually processed in Banner within 24 to 48 hours from submission.
- You will receive an email notification once the change is complete.
- **Punchout order changes cannot be communicated to the supplier.** Please contact them directly 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](mailto:acctpay@nd.edu) and ask them to release the balance..

## 3. Open existing PO

- Select **Create Change Request** under the ellipsis “...” on the upper-right hand of the screen next to the “results” drop down.



## 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.

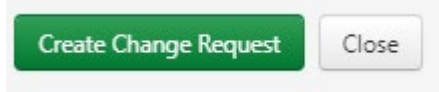
Email notification(s):

- 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

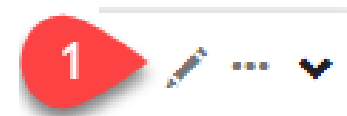
- Under the Codes FOAPAL section of the PO, select the Pencil in the upper right of that section to edit the FOAPAL fields.

**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

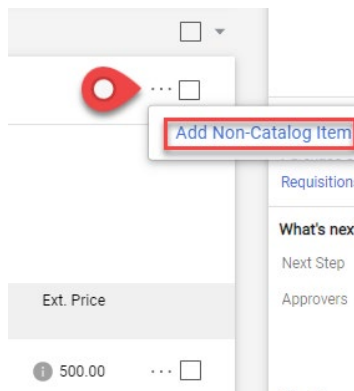
### Edit Codes And FOAPAL

#### Accounting Codes (FOAPAL)

Chart	Fund	
1 Notre Dame	100000	  

## 10. Add a line(s) to the PO

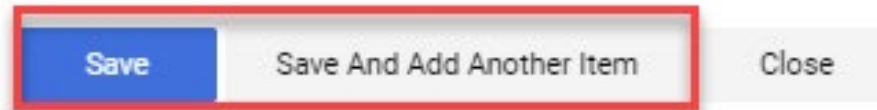
- If you need to add any lines to the PO, click the **ellipses** (3 dots) above the first line item and choose **Add Non-Catalog Item**



Ext. Price 500.00

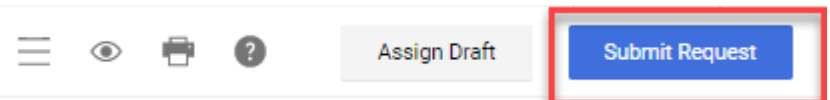
## 11. Add line details

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



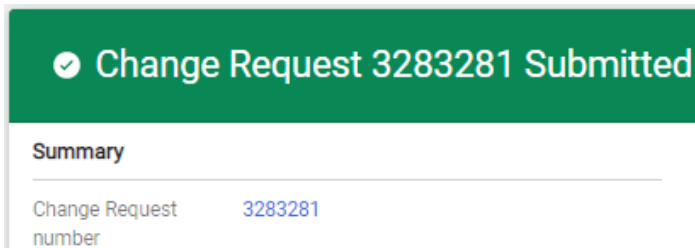
## 12. Changes complete

- 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.

