



Creating a Service Form Change Request Quick Guide

Shopping is Easy in ePro!



Creating a Change Request for a Service Form Quick Guide

ePro Shoppers and Requestors:

Requestors have additional permissions:

- Requestors can submit change requests. Changes can include general information, shipping information, Service Descriptions, pricing, quantity, Service Dates, and Commodity Code.
- Requestors can submit change requests on behalf of Shoppers, who do not have permission to submit change requests.
- Requestors are users who have knowledge of ePro accounting codes and Chartfields. The requestor may need to update the Change Request with these codes before placing an order.
- Responsibilities of a Requestor include following Procurement Guidelines, bid thresholds, validating accuracy of Accounting Chartfields, Ship To information, and Business Purpose.



Creating a Change Request Quick Guide

From the search bar on the top of ePro screen, search for the PO Number needing a change request. ePro search will allow you to search using a portion of the PO number. You can also search by supplier name, requisition number, and PO owner. As you can see in the example, the system provides multiple options to search.

Click the link to the PO Number when it is displayed.

The screenshot shows the ePro system interface. At the top, there is a search bar with the text '0616'. Below the search bar, the search results are displayed in a table. The table has columns for Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, Supplier, and Total Amount. The search results are filtered by 'city leadership'. The PO number 'NT00000616' is highlighted in blue, and an arrow points to it. Another arrow points to the search bar containing 'city leadership'.

	Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
<input type="checkbox"/>	3754901	Change Request	Complete	NT Requestor	4/18/2023 2:33:53 PM	4/18/2023 4:09:34 PM	City Leadership	16,000.00 USD
<input type="checkbox"/>	NT00000616	Purchase Order	Complete	NT Requestor	4/18/2023 2:29:19 PM	4/18/2023 4:10:06 PM	City Leadership	16,000.00 USD
<input type="checkbox"/>	3754865	Requisition	Complete	NT Requestor	4/18/2023 2:20:45 PM	4/18/2023 2:29:19 PM	City Leadership	15,000.00 USD
<input type="checkbox"/>	NT00000458	Purchase Order	Complete	NT Requestor	2/14/2023 10:01:06 AM	2/14/2023 10:01:36 AM	City Leadership	6,300.00 USD
<input type="checkbox"/>	NT00000206	Purchase Order	Complete	NT Requestor	1/24/2023 12:32:50 PM	1/24/2023 12:34:07 PM	City Leadership	6,264.00 USD



Creating a Change Request Quick Guide

From the Purchase Order, click on the three dots in the top right of the screen and click the link to 'Create Change Request'.

The screenshot displays the E-PRO interface for a Purchase Order. The breadcrumb trail is 'Purchase Order • City Leadership • NT00000616 Revision 1'. The top right corner shows a balance of 0.00 USD, a search bar, and notification icons. A dropdown menu is open, triggered by a click on the three dots icon, showing the following options: 'Purchase Order NT00000616 Revision 1', 'Add Comment', 'Create Change Request', 'Add Notes to History', 'Create Quantity Receipt', 'Create Cost Receipt', and 'Print Fax Version'. The 'Create Change Request' option is highlighted with a red arrow. The main content area shows tabs for 'Summary', 'Revisions', 'Confirmations', 'Shipments', 'Change Requests', 'Receipts', 'Invoices', and 'Comments'. The 'Summary' tab is active, displaying a grid of information:

General Information	Shipping Information	Billing/Payment
PO Business Unit University of North Texas (NT752)	Ship To Deliver to: NT Requestor Bldg/Rm: 213 UNT System Business Service Center Denton, TX 76205 United States	Bill To Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
PO/Reference No. NT00000616	ShipTo Address Code BSCS	BillTo Address Code Billing
Revision No. 1	Delivery Options Delivery Location 0212 101 WEST SILO	Billing Options Payment Terms Net 30 (0% 0, Net 30)
Priority Normal		
Supplier Name City Leadership		
Address Attn: Serve 901/Jeff Riddle 1350 Concourse Ave Ste 463 Memphis, Tennessee 38104 United States		



Creating a Change Request Quick Guide

Create Change Request [X]

Buyer one (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>

Dept Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>

NT Requestor (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>

User with change request permission:

Amy Melvin (Approved) <Amy.Elliott@untsystem.edu>

Carl Miron ADMIN (Approved) <carl.miron@untsystem.edu>

Roohia Shahzad (Approved) <RoohiaShahzad@my.unt.edu>

UNTS Report User (Approved) <James.Armand@untsystem.edu>

sms0549 (Approved) <⚠ Email Missing>

[add email recipient...](#)

Change Request Reason

Adding additional attendee

974 characters remaining [expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type

File

Link/URL

File Name

File

Optional for this form:

- You can send an email notification by clicking the checkbox for the recipient(s) you wish to include.
- You can also specify the user(s) with change request permission.
- You can upload files as attachments.

Required for this form:

From the Create Change Request window, enter a Change Request Reason (for instance: give details for a price change).

Click the 'Create Change Request' button.



Creating a Change Request Quick Guide

The Change Request is created and ready for additional updates by you. Click the pencil icon to change information in the General, Shipping, Internal and External Notes and Attachments, Item Details, and Accounting Codes sections.

The screenshot displays the E-PRO Change Request interface for request ID 3753625. The top navigation bar includes the UNT SYSTEM logo, search functionality, and a cart icon showing 287.80 USD. The main content area is divided into several sections:

- Change Request Reason:** Shows the reason as "Price change" with a pencil icon for editing.
- General:** Contains fields for Cart Name (HUB Test - CR), Description (no value), Business Unit (University of North Texas (NT752)), Department (UNT Denton (NT752)), Budget Date (3/27/2023), PR Override Budget Date (marked with a red X), Priority (Normal), Prepared by (NT Requestor), Prepared for (NT Requestor), and Ad-Hoc Approver (Select).
- Shipping:** Contains fields for Ship To (Deliver to: NT Requestor, Bldg/Rm: 213, UNT System Business Service Center, Denton, TX 76205, United States), Delivery Options (Delivery Location: NTRP H142A, DISCOVERY PARK BUILDING, Requested Delivery Date: no value, Expedite: marked with a red X, Ship Via: Best Carrier-Best Way).
- Billing:** Contains fields for Bill To (Email to: invoices@untsystem.edu, UNT System Business Service Center, 1112 Dallas Dr. Ste. 4200, Denton, TX 76205, United States).
- Draft Summary:** Shows a total of 105,000.00 USD, with a breakdown of Subtotal (105,000.00), Shipping (0.00), and Handling (0.00).
- Related Documents:** Lists Purchase Order: NT00000584 and Requisition: 3740086.
- What's next for my order?:** Shows the next step as Exception Approval and lists approvers: Approver, AM Chauhan, Asima; Grounds, Jimmy; Navapraditar, Joseph; and Shoulders, Ryan.



Creating a Change Request Quick Guide

To modify the service form, you will need to click the link to your form, which will display the form. Click the Next button to advance through the form to the section you need to change.

16 Items ...

City Leadership · 16 Items · 16,000.00 USD

^ SUPPLIER DETAILS 000-Memphis : Attn: Serve 901/Jeff Riddle, 1350... ▾

Contract *no value* Quote number *no value*

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
BA - llp - Svc Form req to change request test					

Contract: *no value*

UNT SYSTEM | UNT | hsc² | UNT DALLAS | All ▾ | Search (Alt+Q) 🔍 | 0.00 USD 🛒 | 19 📬 | 126 👤

Shop ▸ Shopping ▸ View Forms

[Back to Change Request](#)

BA - llp - Svc Form req to ... Request Actions ▾

Form Number **778852**
Purpose **Procurement Request**
Status **On Document**

Instructions

Please use the form to request **services**.

Instructions

- Details ✓
- Suppliers ✓
- Form Fields ✓
- Review and Submit

Next ➤



Creating a Change Request Quick Guide

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Shop > Shopping > View Forms

[Back to Change Request](#)

BAAs - Iip - Svc Form req to ... Request Actions | History | ?

Form Number: 778852
Purpose: Procurement Request
Status: On Document

Instructions

Details

Suppliers

Form Fields

Review and Submit

Form Fields - Service Form Information

On This Page ★ Response Is Required

- Service Description (3)
- Pricing (1)

Instructions
Please complete this form

Service Description
Please complete all the required fields marked with a star.

Service Short Description *

Leadership Conference

Service Description *

Leadership Conference

1979 characters remaining

Will this service be performed on campus? *

Yes No

Pricing

Service Total Amount

Unit Price	Quantity	Total
1,000.00 USD	18	16,000.00 USD

Service Start Date * 05/02/2023
mm/dd/yyyy

Service End Date * 05/05/2023
mm/dd/yyyy

Commodity Code 924-78 - Lecturer or Guest Speaker

For this example, we update the Quantity from 16 to 18.

You could change any of the fields, including Service Descriptions, pricing, quantity, Service Dates, and Commodity Code.

When your changes are complete, click the Save on Change Request button. Then click the Next button.



Creating a Change Request Quick Guide

Click the Back to Change Request button to return to the Change Request.

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Shop > Shopping > View Forms

[Back to Change Request](#)

BAs - Iip - Svc Form req to ...

Form Number: 778852
Purpose: Procurement Request
Status: On Document

Instructions

- Details ✓
- Suppliers ✓
- Form Fields ✓

Review and Submit

Request Actions | History ?

✓ Required Fields Complete

Section	Progress
Details	✓ Required Fields Complete
Suppliers	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

[Previous](#) [Back to Change Request](#)





Creating a Change Request Quick Guide

After you review your changes, click the Submit Request button in the top right section of the change request. A confirmation will display to confirm the request is successfully submitted.

The screenshot displays the E-PRO system interface for a change request. At the top, the header includes 'UNTSYSTEM | UNT | hsc | UNT DALLAS', a search bar, and a currency display of '0.00 USD'. The main content area shows 'Change Requests • 3755120' with tabs for 'Summary', 'Taxes/S&H', 'PO Preview', 'External Communication', 'Comments 1', 'Attachments', and 'History'. A purple 'Draft' label is visible. A green confirmation banner at the top right states 'Change Request 3755120 Submitted'. Below this, the 'Change Request Reason' is 'Adding additional attendee'. The 'General' section shows 'Cart Name: BAs - Ilp - Service Form - Change Request Test - CR(1)' and 'Description: no value'. The 'Shipping' section shows 'Ship To: Deliver to: NT Requestor, Bldg/Rm: 213, UNT System Business Service Center, Denton, TX 76205, United States'. The 'Billing' section shows 'Bill To: Email to: invoices@untsystem, UNT System Business Service, 1112 Dallas Dr. Ste. 4200, Denton, TX 76205, United States'. A 'Summary' table on the right lists: Change Request number (3755120), Change Request status (Pending), Cart name (BAs - Ilp - Service Form - Change Request Test - CR(1)), Change Request date (4/19/2023), Change Request total (18,000.00 USD), and Number of line items (1). 'Options' include 'Print', 'Print preview', 'Recent orders', and 'Return to your home page'.



Creating a Change Request Quick Guide

You can view the status of your change request by watching the Location icon in the workflow.

The screenshot displays the E-PRO Change Request interface for request 3755120. The status is 'Pending'. The interface is divided into several sections:

- Change Request Reason:** Reason: Adding additional attendee.
- General:** Status: Pending (Purchasing Review). Submitted: 4/19/2023 8:19 AM. Cart Name: BAs - Iip - Service Form - Change Request Test - CR(1). Description: no value. Business Unit: University of North Texas (NT752). Department: UNT Denton (NT752). Budget Date: 4/18/2023. FR Override Budget Date: X. Priority: Normal. Prepared by: NT Requestor. Prepared for: NT Requestor.
- Shipping:** Ship To: Deliver to: NT Requestor, Bldg/Rm: 213, UNT System Business Service Center, Denton, TX 76205, United States. Delivery Options: Delivery Location: 0212 101 WEST SILO. Requested Delivery Date: no value. Expedite: X. Ship Via: Best Carrier-Best Way.
- Billing:** Bill To: Email to: Invoices@untsystem.edu, UNT System Business Service Center, 1112 Dallas Dr. Ste. 4200, Denton, TX 76205, United States.
- Accounting Codes:** Values vary by line.
- Internal Notes and Attachments:** Internal Note: Service Form Change Request Test. Internal Attachments: Is Supplier a Foreign Vendor? X. Previous PO: no value. Purchase Order Category Code: 9, Exempt from TSPC.
- Buyers Only:** Buyer_ID: Jill Roys (J0081).
- External Notes and Attachments:** Note to all Suppliers: no value. Attachments for all suppliers. PO Clauses.
- Summary:** Total (18,000.00 USD). Shipping, Handling, and Tax charges are calculated and charged by each supplier. Subtotal: 18,000.00. Shipping: 0.00. Handling: 0.00.
- Related Documents:** Purchase Order: NT00000616, Requisition: 3754865.
- What's next? Workflow:** Submitted (4/19/2023 8:19 AM, NT Requestor), OFAC Check (Completed), Initial Validation Request (Completed), **Purchasing Review (Active)**, Department Approval (Future), Final Validation Request (Future), 2nd OFAC Check (Future), Create PO (Future), Finish (Future).

A black arrow points from the 'Internal Notes and Attachments' section to the 'Purchasing Review' step in the workflow, indicating that the status of the change request can be viewed by watching the Location icon in the workflow.