

Creating a Change Request

How Do I Change a Hosted Catalog Purchase?

Shopping is Easy in UNT System Marketplace!

Creating a Change Request for Hosted Catalog Quick Guide

UNT System Marketplace Requestors:

Requestors have permissions for creating change requests:

- **UNT System Marketplace makes it easy to order additional items as needed! There is no need to create a change request** - Simply follow the process to shop and order from the hosted supplier. See Shoppers and Requestors - Guide for Hosted Catalog Shopping for a quick guide to shopping with a hosted catalog supplier.
- Requestors can submit change requests. On hosted catalog change requests, Requestors can update accounting Chartfields, commodity codes, external notes, and internal notes and attachments.
CHANGE ORDERS CANNOT BE USED FOR PRICE OR QUANTITY CHANGE OR TO ADD A NEW LINE FOR CATALOG PURCHASES
- The Requestor can submit change requests on behalf of Shoppers, who do not have permission to submit change requests.
- Requestors are users who have knowledge of UNT System Marketplace 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.

How Do I Change a Hosted Catalog Order? Quick Guide

You can create change requests for hosted catalog suppliers by opening your purchase order. Click the ellipses (...) in the top right corner, then click the link to Create Change Request in the drop-down list.

Purchase Order • Eppendorf North America Inc • NT00000622 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments

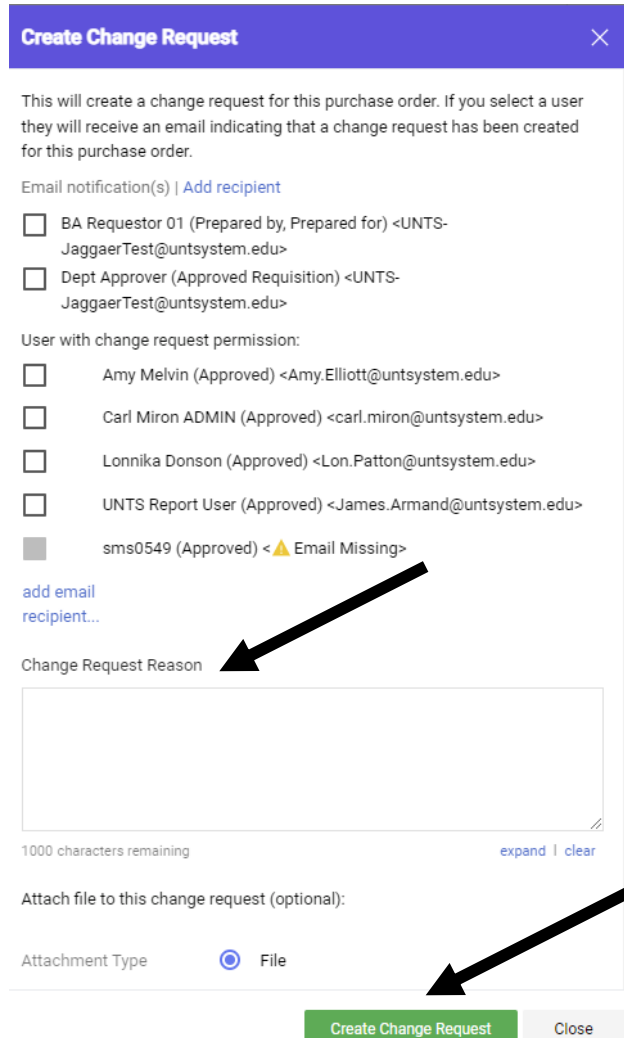
Purchase Order: Poole, Linda (Linda.Poole@untsystem.edu)

General Information		Document Status	
PO Business Unit	University of North Texas (NT752)	PO status	Open
PO/Reference No.	NT00000622	Workflow	✓ Completed (4/24/2023 8:07 AM)
Revision No.	0	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view	
Supplier Name	Eppendorf North America Inc	Email (HTML Body)	OrderValidation@sciquest.com
Purchase Order Date	4/24/2023	Manual	
Total	199.80	Distribution Date/Time	4/24/2023 8:07 AM
Owner Name	BA Requestor 01	Supplier	Sent To Supplier
Owner Department	no value		
Owner Phone			
Owner Email	UNTS-JaggaerTest@untsystem.edu		
Requisition Number	3755172 view print		

Total (199.80 USD)	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Subtotal	199.80
Shipping	0.00
Handling	0.00

- Create Change Request
- Add Notes to History
- Create Quantity Receipt
- Print Fax Version

Creating a Change Request Quick Guide



Create Change Request [X]

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) | [Add recipient](#)

BA Requestor 01 (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>

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

User with change request permission:

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

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

Lonnikia Donson (Approved) <Lon.Patton@untsystem.edu>

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

sms0549 (Approved) <▲ Email Missing>

[add email recipient...](#)

Change Request Reason

1000 characters remaining [expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type File

[Create Change Request](#) [Close](#)

Optional for this form:

- You can send an email notification by clicking the checkbox to the recipient(s) you wish to include.
- You can add attachments to the change request.

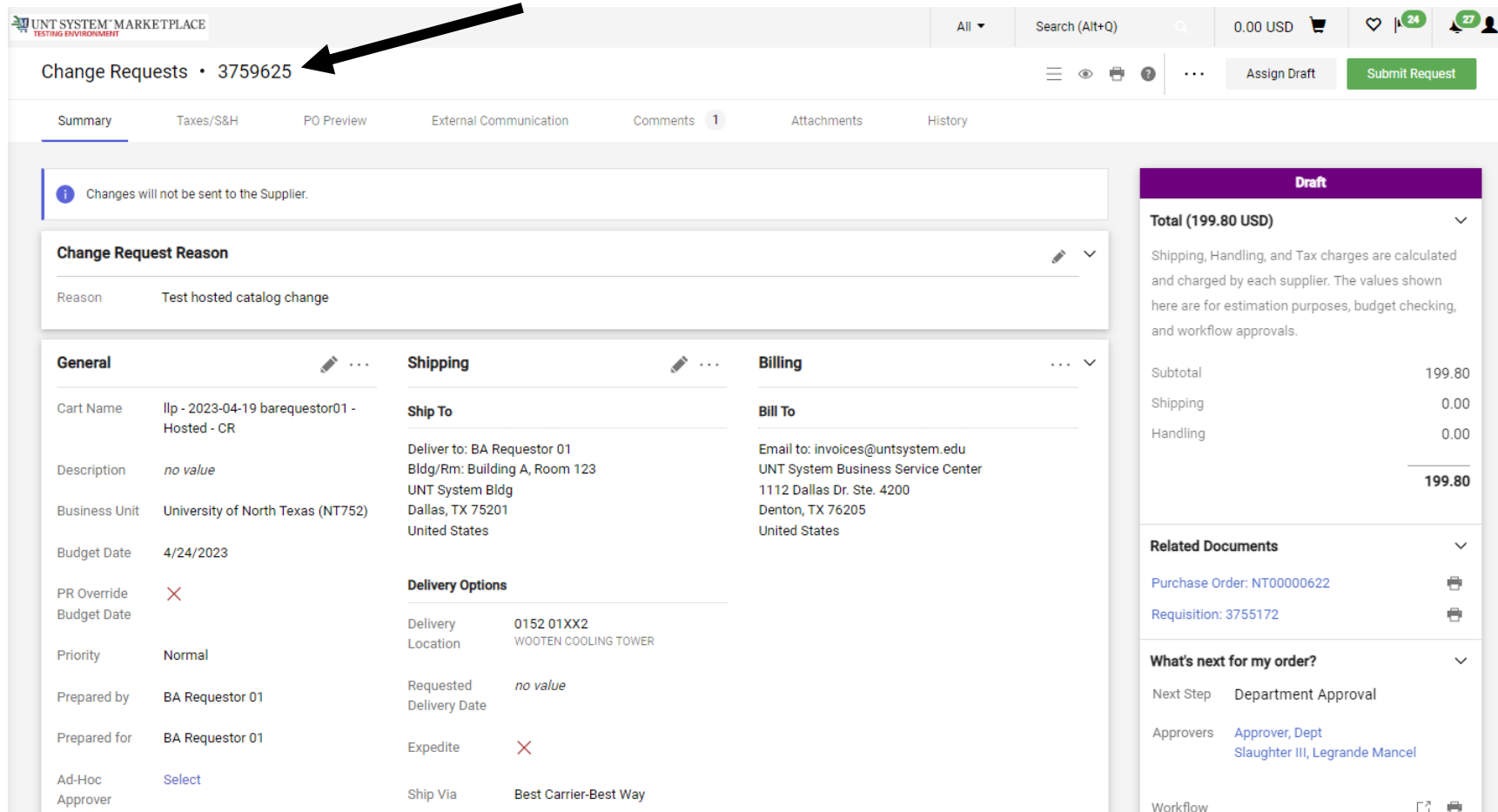
Required for this form:

In the Create Change Request window, enter a Change Request Reason (for instance: changing a ChartField).

Click the Create Change Request button.

Creating a Change Request Quick Guide

The Change Request is created and ready for additional updates by you.



Change Requests • 3759625

Summary | Taxes/S&H | PO Preview | External Communication | Comments 1 | Attachments | History

Changes will not be sent to the Supplier.

Change Request Reason

Reason	Test hosted catalog change
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General	Shipping	Billing
Cart Name llp - 2023-04-19 barequestor01 - Hosted - CR Description no value Business Unit University of North Texas (NT752) Budget Date 4/24/2023 PR Override ✗ Budget Date Priority Normal Prepared by BA Requestor 01 Prepared for BA Requestor 01 Ad-Hoc Approver Select	Ship To Deliver to: BA Requestor 01 Bldg/Rm: Building A, Room 123 UNT System Bldg Dallas, TX 75201 United States Delivery Options Delivery 0152 01XX2 Location WOOTEN COOLING TOWER Requested Delivery Date no value Expedite ✗ Ship Via Best Carrier-Best Way	Bill To Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States

Draft

Total (199.80 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	199.80
Shipping	0.00
Handling	0.00
	199.80

Related Documents

[Purchase Order: NT00000622](#)

[Requisition: 3755172](#)

What's next for my order?

Next Step Department Approval

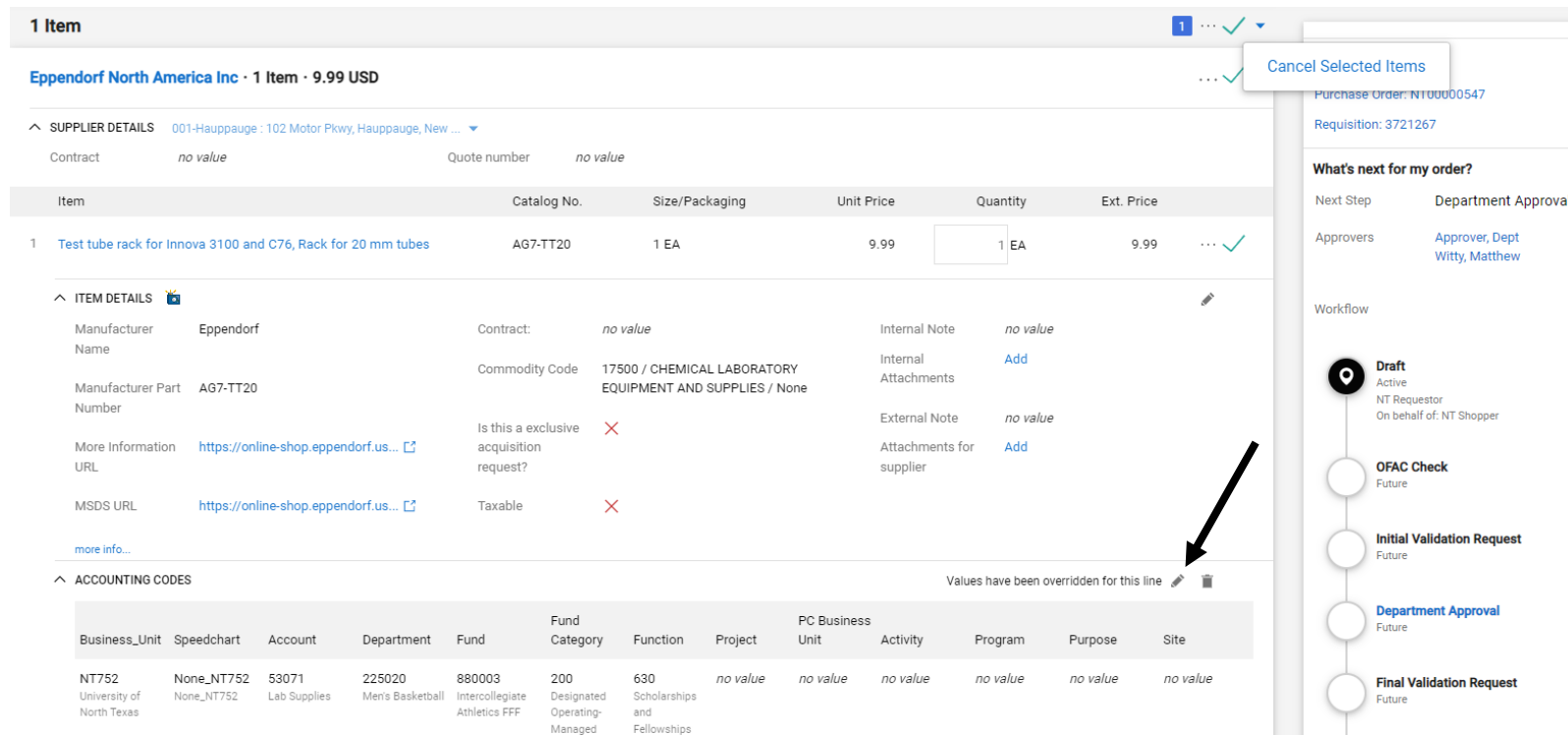
Approvers [Approver, Dept Slaughter III, Legrande Mancel](#)

Workflow

How Do I Change a Hosted Catalog Order? Quick Guide

You can change internal fields for hosted suppliers by clicking the pencil icon in the section where you need to make a change.

If you need to change the quantity ordered or remove item lines after a purchase order has been sent to a hosted catalog supplier, please contact the supplier for assistance. This will allow you to coordinate adjustments to the existing purchase order with the supplier and will help avoid confusion with the order.



1 Item 1 ... ✓


Eppendorf North America Inc · 1 Item · 9.99 USD ... ✓ Cancel Selected Items

Purchase Order: NT00000547
Requisition: 3721267

SUPPLIER DETAILS 001-Hauppauge : 102 Motor Pkwy, Hauppauge, New ...



Contract	no value	Quote number	no value
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Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Test tube rack for Innova 3100 and C76, Rack for 20 mm tubes	AG7-TT20	1 EA	9.99	1 EA	9.99	... ✓

ITEM DETAILS 

Manufacturer Name	Eppendorf	Contract:	no value	Internal Note	no value
Manufacturer Part Number	AG7-TT20	Commodity Code	17500 / CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES / None	Internal Attachments	Add
More Information URL	https://online-shop.eppendorf.us...	Is this a exclusive acquisition request?	✗	External Note	no value
MSDS URL	https://online-shop.eppendorf.us...	Taxable	✗	Attachments for supplier	Add

[more info...](#)

ACCOUNTING CODES Values have been overridden for this line  

Business_Unit	Speedchart	Account	Department	Fund	Fund Category	Function	Project	PC Business Unit	Activity	Program	Purpose	Site
NT752 University of North Texas	None_NT752 None_NT752	53071 Lab Supplies	225020 Men's Basketball	880003 Intercollegiate Athletics FFF	200 Designated Operating-Managed	630 Scholarships and Fellowships	no value	no value	no value	no value	no value	no value

What's next for my order?

Next Step: Department Approval

Approvers: Approver, Dept Witty, Matthew

Workflow:

- Draft** (Active)
 - NT Requestor
 - On behalf of: NT Shopper
- OFAC Check** (Future)
- Initial Validation Request** (Future)
- Department Approval** (Future)
- Final Validation Request** (Future)

How Do I Change a Hosted Catalog Order? Quick Guide

Changing internal information, like ChartField values, Commodity Codes, adding internal notes and attachments, and external notes can be accomplished with the pencil icon. For ChartField changes, clicking the pencil icon opens a popup for your changes. You can verify that the ChartString is valid by clicking the checkmark (✓) icon.

After you complete the changes, click the Save button.

Override Line 1: Accounting Codes ✕

Business_Unit *	Speedchart *	Account *	Department *	Fund *	Fund Category *	Function *	Project *
NT752	None_NT752	53071 Lab Supplies	121100	885000	202	100	

+
✓
Save
Close

★ Required fields

ACCOUNTING CODES Values have been overridden for this line

Business_Unit	Speedchart	Account	Department	Fund	Fund Category	Function	Project	PC Business Unit	Activity	Program	Purpose	Site
NT752	None_NT752	53071	121200	885000	202	100	no value	no value	no value	no value	no value	no value
University of North Texas	NT752_Default	Lab Supplies	Chemistry	Departmental Discretionary	Designated Operating-General	Instruction-General						

What's next for my order?

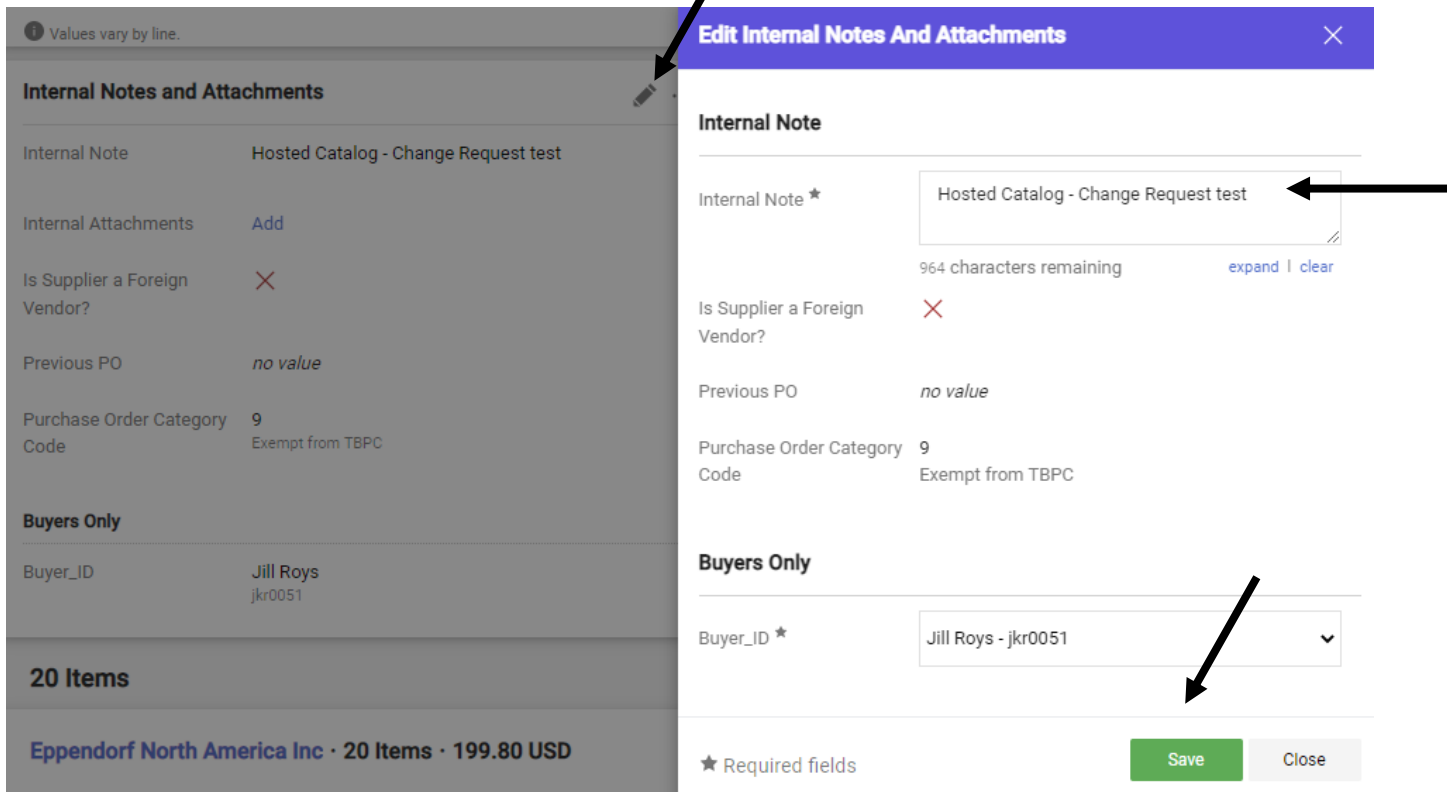
Next Step: Department Approval

Approvers: Approver, Dept
Slaughter III, Legrande Mancel

Workflow

How Do I Change a Hosted Catalog Order? Quick Guide

To add Internal Notes, click the pencil icon. A popup will display to allow you to add notes and any additional information. Click Save when your edits are complete.



The screenshot shows a modal window titled "Edit Internal Notes And Attachments" with a close button (X) in the top right corner. The modal is divided into two main sections: "Internal Note" and "Buyers Only".

Internal Note Section:

- Internal Note ***: A text input field containing "Hosted Catalog - Change Request test". A pencil icon is visible on the right side of the input field. Below the field, it indicates "964 characters remaining" and has "expand | clear" links.
- Is Supplier a Foreign Vendor?**: A checkbox that is currently unchecked, marked with a red "X".
- Previous PO**: The value is "no value".
- Purchase Order Category Code**: The value is "9 Exempt from TBPC".

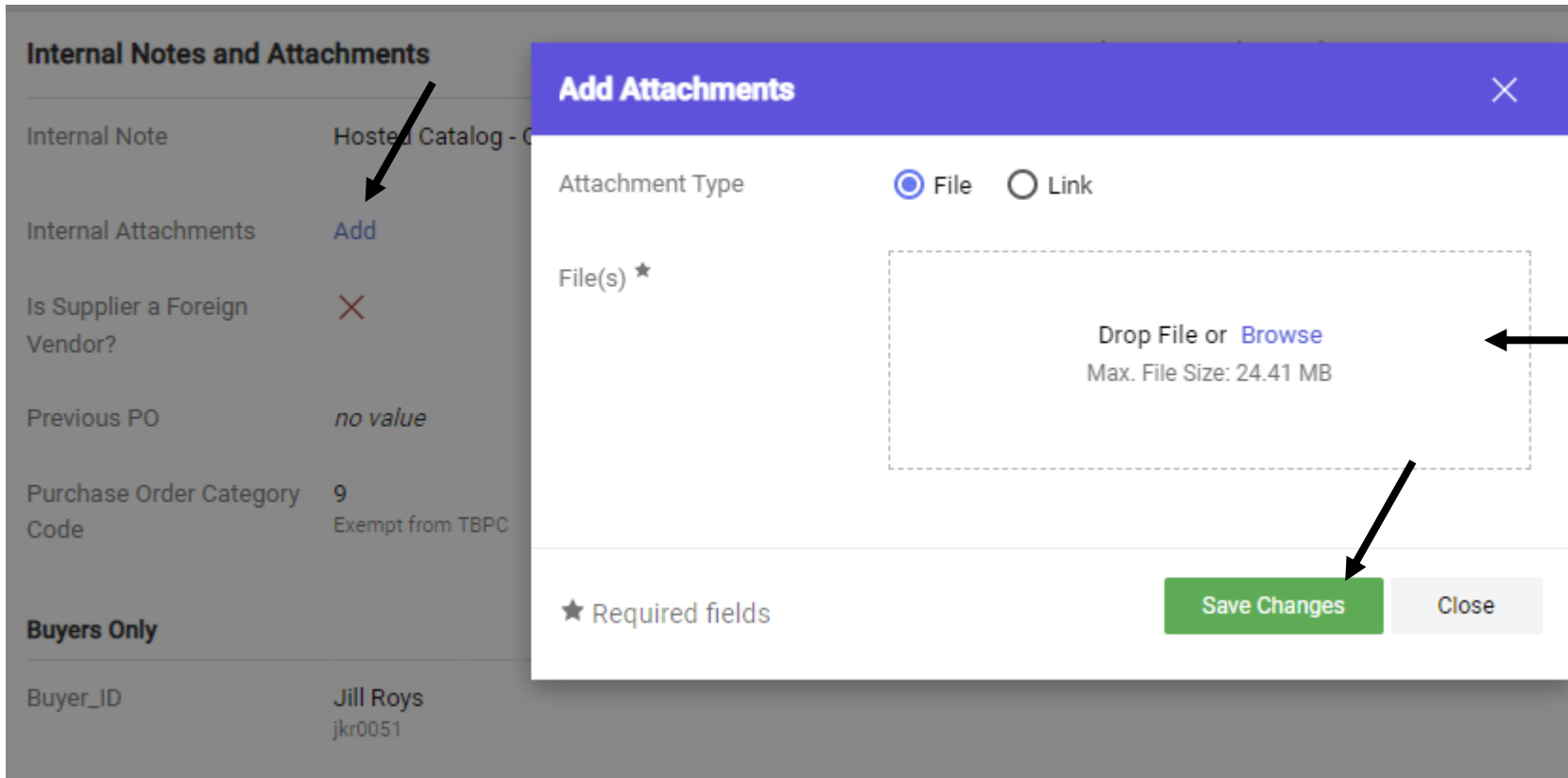
Buyers Only Section:

- Buyer_ID ***: A dropdown menu showing "Jill Roys - jkr0051".

At the bottom of the modal, there is a legend for "★ Required fields" and two buttons: a green "Save" button and a grey "Close" button. A pencil icon in the top left corner of the modal is highlighted with an arrow from the text above. Another arrow points to the text input field, and a third arrow points to the "Save" button.

How Do I Change a Hosted Catalog Order? Quick Guide

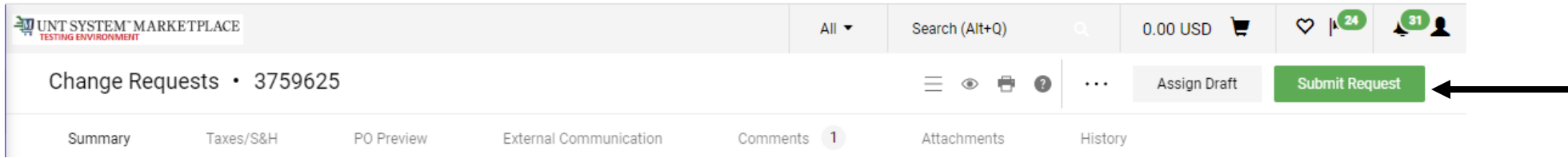
To add attachments, click the Add link. A popup will display to allow you to add your file or link. Click Save Changes when your edits are complete.



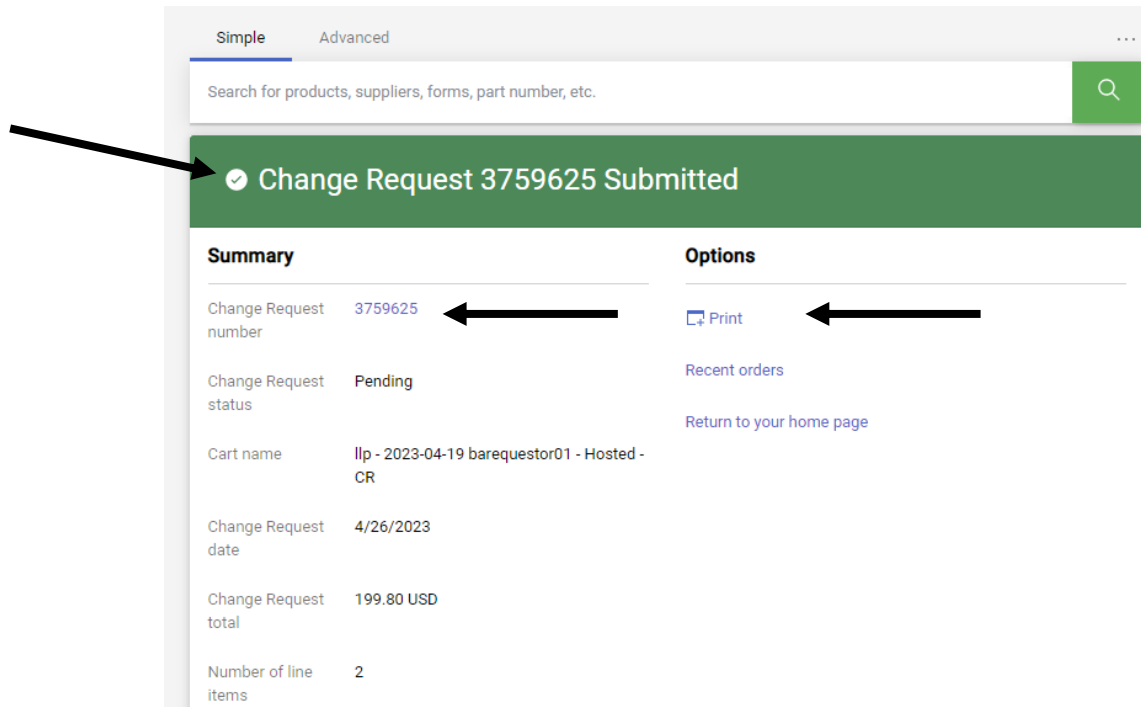
The screenshot shows a user interface for managing a hosted catalog order. On the left, a sidebar titled "Internal Notes and Attachments" contains several fields: "Internal Note" (Hosted Catalog - C), "Internal Attachments" (Add), "Is Supplier a Foreign Vendor?" (X), "Previous PO" (no value), "Purchase Order Category Code" (9 Exempt from TBPC), and "Buyer ID" (Jill Roys jkr0051). A black arrow points from the "Add" link in the "Internal Attachments" section to the "Add Attachments" popup. The popup has a blue header with a close button (X). Below the header, there are radio buttons for "Attachment Type" (File selected, Link unselected). A "File(s) *" field is followed by a dashed box containing the text "Drop File or Browse" and "Max. File Size: 24.41 MB". A black arrow points from the "Browse" link to this dashed box. At the bottom of the popup, there is a green "Save Changes" button and a grey "Close" button. A black arrow points from the "Save Changes" button to the text "Save Changes" in the instruction above. A legend at the bottom left of the popup indicates "★ Required fields".

How Do I Change a Hosted Catalog Order? Quick Guide

When your change request is complete, click the Submit Request button in the top right corner of the screen to submit the change.

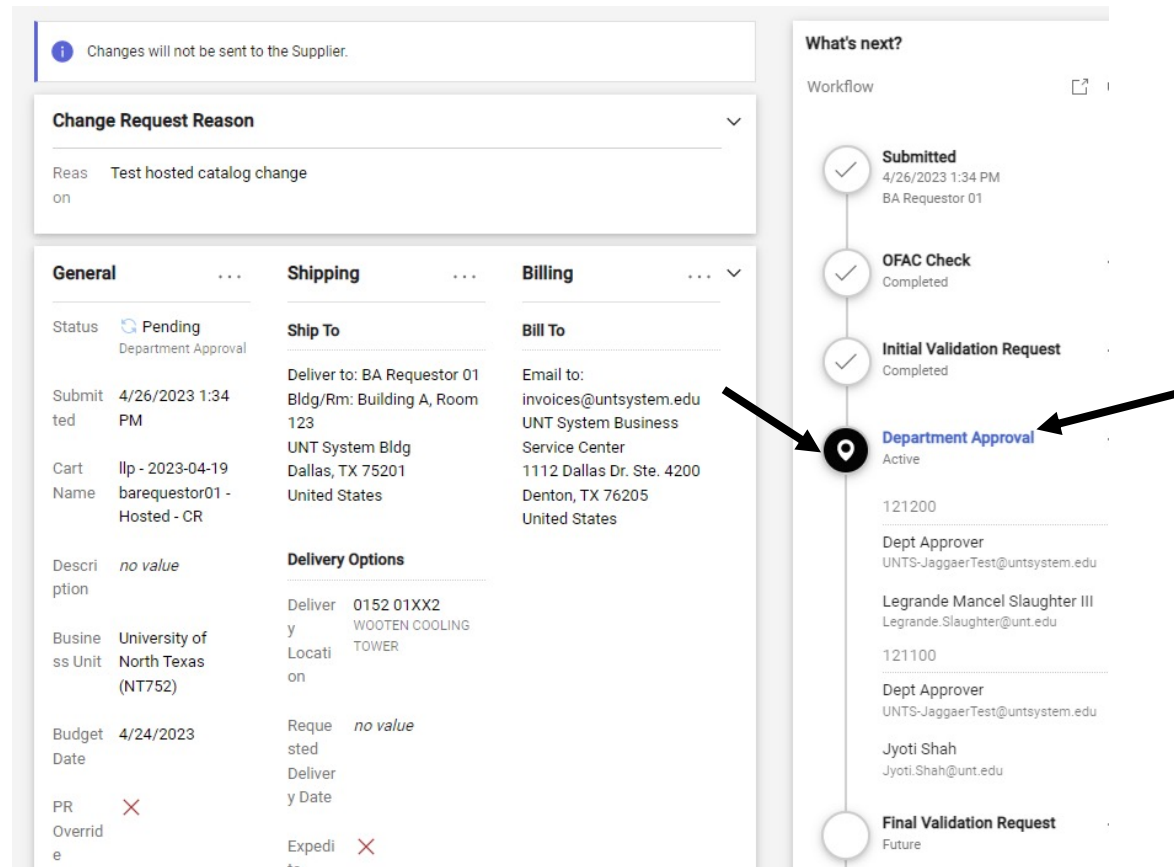


A confirmation will be displayed with links to view or print your change request.



How Do I Change a Hosted Catalog Order? Quick Guide

Marketplace provides useful information about the status for your change request. The Location icon notifies you of the current workflow step. Clicking blue links in the What's Next section will expand the workflow for you to view approvers.



Changes will not be sent to the Supplier.

Change Request Reason

Reason: Test hosted catalog change

General **Shipping** **Billing**

Status: **Pending** (Department Approval)

Submitted: 4/26/2023 1:34 PM

Cart Name: llp - 2023-04-19 barequestor01 - Hosted - CR

Description: no value

Business Unit: University of North Texas (NT752)

Budget Date: 4/24/2023

PR Override:

Ship To

Deliver to: BA Requestor 01
Bldg/Rm: Building A, Room 123
UNT System Bldg
Dallas, TX 75201
United States

Delivery Options

Delivery: 0152 01XX2 WOOTEN COOLING TOWER

Requested Delivery Date: no value

Expedite:

Bill To

Email to: invoices@untsystem.edu
UNT System Business Service Center
1112 Dallas Dr. Ste. 4200
Denton, TX 76205
United States

What's next?

Workflow

- Submitted (4/26/2023 1:34 PM) - BA Requestor 01
- OFAC Check - Completed
- Initial Validation Request - Completed
- Department Approval** - Active (Location icon)
- 121200
- Dept Approver: UNTS-JaggaerTest@untsystem.edu
Legrande Mancel Slaughter III
Legrande.Slaughter@unt.edu
- 121100
- Dept Approver: UNTS-JaggaerTest@untsystem.edu
Jyoti Shah
Jyoti.Shah@unt.edu
- Final Validation Request - Future