

Creating a Change Request for a Non-Catalog Item Quick Guide

Shopping is Easy in UNT System Marketplace!

Creating a Change Request for Non-Catalog Items Quick Guide

UNT System Marketplace Requestors:

Requestors have permissions for creating change requests:

- Requestors can submit change requests. On non-catalog change requests, Requestors can update price, quantity, accounting Chartfields, commodity codes, shipping information, notes and attachments.
- 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 UNTS 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.

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From the search bar on the top of the Marketplace screen, search for the PO Number needing a change request. Marketplace search will allow you to search using a portion of the PO number. As you can see in the example, the system provides multiple ways to search.

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

The screenshot shows the 'Search Purchase Orders' interface. At the top, there is a search bar with the text '0584' and a search icon. Below the search bar, the results are displayed in a table. The table has columns for PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount. The first row shows a PO Number of 'NT00000584' (highlighted with a blue link), Supplier '308 Construction, LLC', Created Date/Time '3/27/2023 3:05:45 PM', PO Status 'Completed', Requisition Number '3740086', PO Owner 'NT Requestor', Shipment Status 'Sent To Supplier', Matching Status 'No Matches', and Total Amount '105,000.00 USD'. On the left side, there are filters for 'Supplier' (308 Construction, LLC) and 'PO Owner' (Requestor, NT). On the right side, there are options for 'Save As', 'Pin Filters', and 'Export All'. A search bar at the top right contains 'Search (Alt+Q)' and a search icon. A shopping cart icon shows '0.00 USD'. There are also notification icons for '11' and '114'.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
NT00000584	308 Construction, LLC	3/27/2023 3:05:45 PM	Completed	3740086	NT Requestor	Sent To Supplier	No Matches	105,000.00 USD

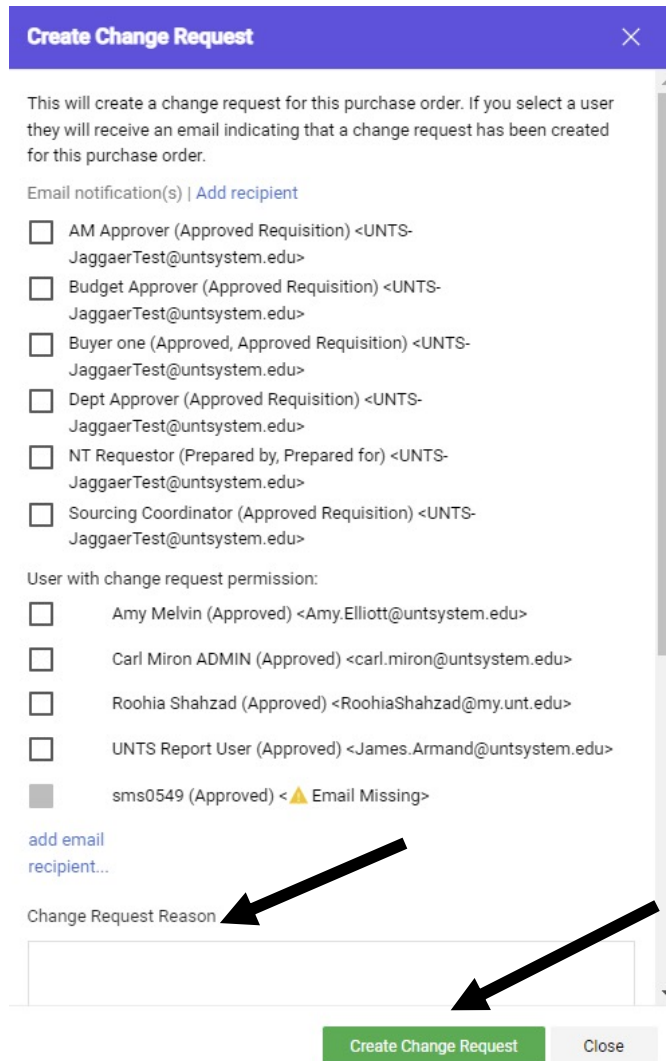
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From the Purchase Order, click on the three dots in the top right of the screen, and click the link to Create Change Request.

The screenshot displays the UNT System Marketplace interface for a Purchase Order. The breadcrumb trail at the top reads: Purchase Order • 308 Construction, LLC • NT00000584 Revision 0. The main navigation bar includes tabs for Status, Summary, Revisions (1), Confirmations, Shipments, Change Requests, Receipts, Invoices, Comments, Attachments, and History. The 'Status' tab is active. The main content area is divided into two columns: 'General Information' and 'Document Status'. The 'General Information' section includes fields for PO Business Unit (University of North Texas (NT752)), PO/Reference No. (NT00000584), Revision No. (0), Supplier Name (308 Construction, LLC), and Purchase Order Date (3/27/2023). The 'Document Status' section shows PO status as Open and Workflow as Completed (3/27/2023 3:25 PM). A right-hand sidebar contains a 'Details' section with fields for Supplier Status, Sent To Supplier, and Supplier (308 Construction, LLC). A dropdown menu is open in the top right corner, triggered by a three-dot icon, and lists the following options: Add Comment, Create Change Request (highlighted with a green bar), Add Notes to History, Create Quantity Receipt, and Print Fax Version. Two black arrows point to the three-dot icon and the 'Create Change Request' option.

General Information	Document Status
PO Business Unit: University of North Texas (NT752)	PO status: Open
PO/Reference No.: NT00000584	Workflow: ✓ Completed (3/27/2023 3:25 PM)
Revision No.: 0	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
Supplier Name: 308 Construction, LLC	Manual
Purchase Order Date: 3/27/2023	

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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](#)

- AM Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Budget Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Buyer one (Approved, Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Dept Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- NT Requestor (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>
- Sourcing Coordinator (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>
- 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

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 also attach files to the change request.

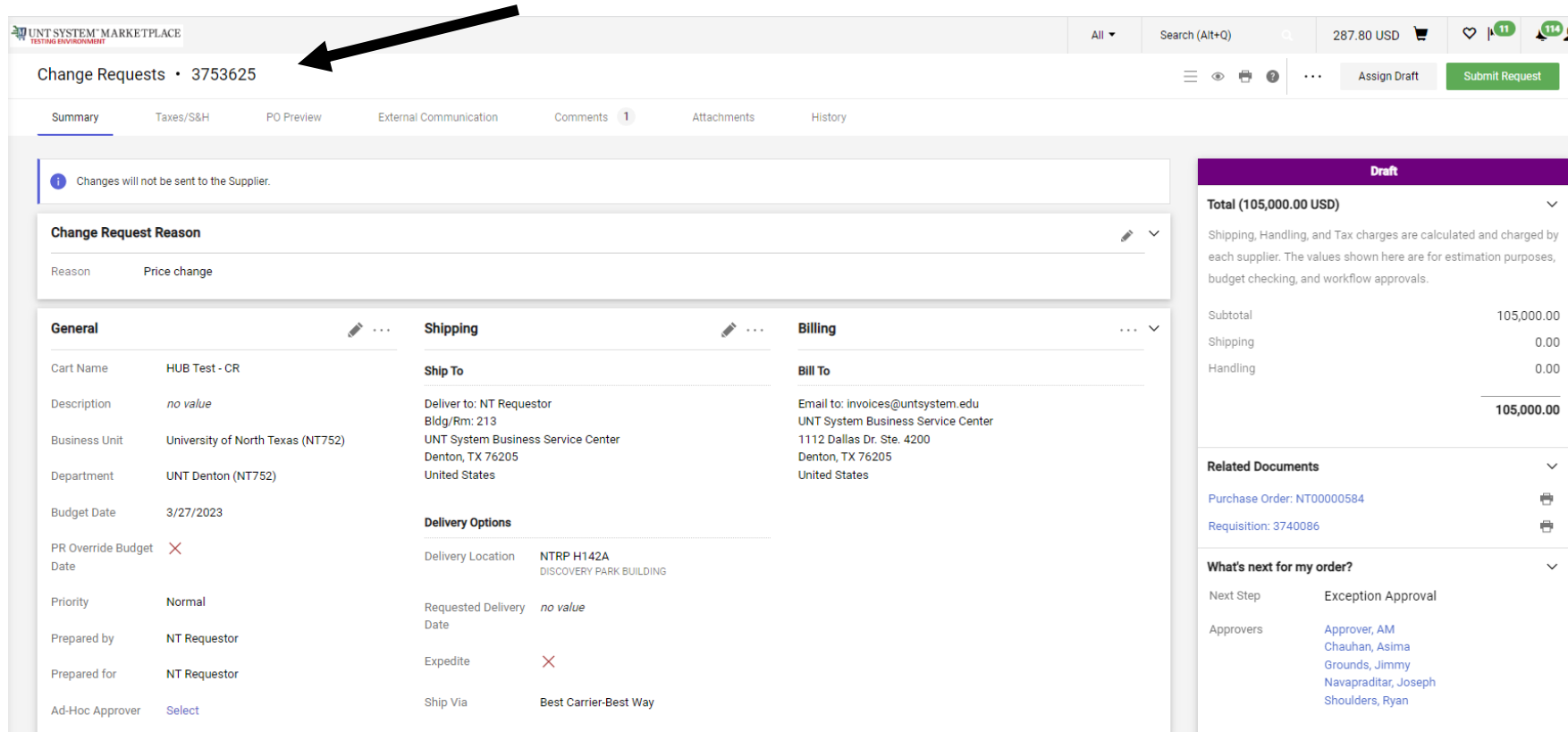
Required for this form:

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

Click the Create Change Request button.

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



Change Requests • 3753625

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

Changes will not be sent to the Supplier.

Change Request Reason

Reason	Price change
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General	Shipping	Billing
Cart Name: HUB Test - CR	Ship To	Bill To
Description: no value	Deliver to: NT Requestor Bldg/Rm: 213 UNT System Business Service Center Denton, TX 76205 United States	Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Business Unit: University of North Texas (NT752)	Delivery Options	
Department: UNT Denton (NT752)	Delivery Location: NTRP H142A DISCOVERY PARK BUILDING	
Budget Date: 3/27/2023	Requested Delivery Date: no value	
PR Override Budget Date: <input checked="" type="checkbox"/>	Expedite: <input checked="" type="checkbox"/>	
Priority: Normal	Ship Via: Best Carrier-Best Way	
Prepared by: NT Requestor		
Prepared for: NT Requestor		
Ad-Hoc Approver: Select		

Draft

Total (105,000.00 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	105,000.00
Shipping	0.00
Handling	0.00
Total	105,000.00

Related Documents

[Purchase Order: NT00000584](#)

[Requisition: 3740086](#)

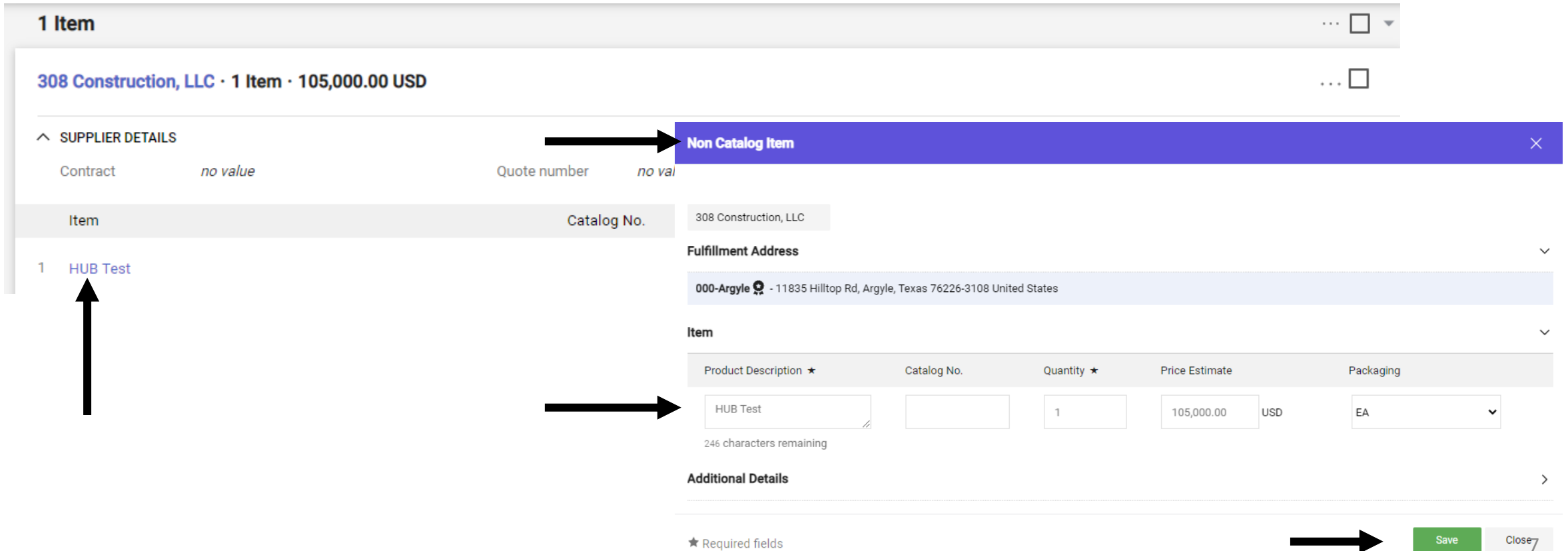
What's next for my order?

Next Step: Exception Approval

Approvers: [Approver, AM Chauhan, Asima Grounds, Jimmy Navapraditar, Joseph Shoulders, Ryan](#)

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Click the link for the Item description in the Item section. On the Non-Catalog Item window, make your changes and click the Save button.



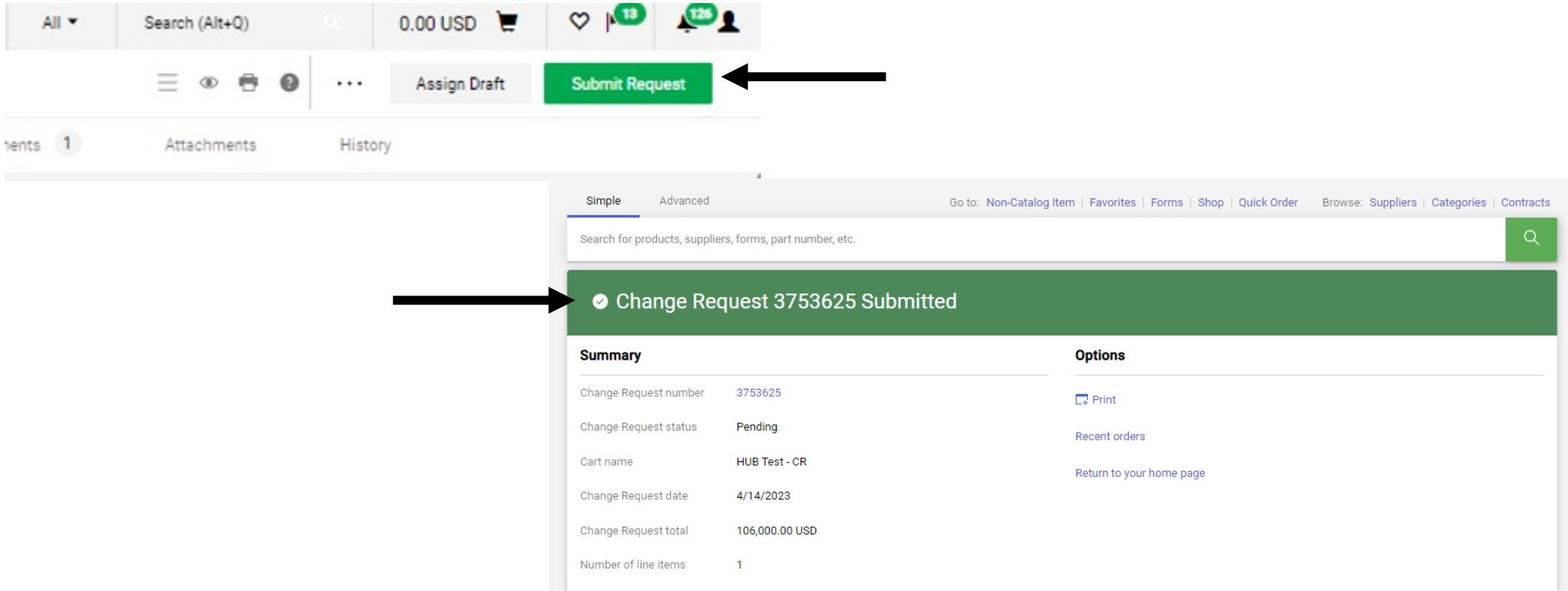
The screenshot shows the 'Non Catalog Item' window in the UNT System Marketplace. The window is titled 'Non Catalog Item' and is open for '308 Construction, LLC'. The window displays the following information:

- Supplier Details:** Contract: no value, Quote number: no value
- Item Section:** A table with one item: 'HUB Test'. The table has columns for Product Description, Catalog No., Quantity, Price Estimate, and Packaging. The 'HUB Test' item has a quantity of 1 and a price estimate of 105,000.00 USD. The packaging is 'EA'.
- Additional Details:** A section for additional details, currently empty.
- Buttons:** A 'Save' button (highlighted in green) and a 'Close' button.

Arrows in the image point to the 'HUB Test' link in the Item section, the 'Non Catalog Item' window title, and the 'Save' button.

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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 top navigation bar of the UNT System Marketplace. On the right side of the bar, there is a green 'Submit Request' button, which is highlighted by a black arrow. Below the navigation bar, a confirmation message is displayed in a green banner: 'Change Request 3753625 Submitted', also highlighted by a black arrow. Below the banner, a summary table provides details about the submitted change request.

Summary		Options	
Change Request number	3753625	Print	
Change Request status	Pending	Recent orders	
Cart name	HUB Test - CR	Return to your home page	
Change Request date	4/14/2023		
Change Request total	106,000.00 USD		
Number of line items	1		

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

The screenshot displays the 'Change Requests' interface for request ID 3753625. The 'History' tab is active, showing a workflow with the following steps:

- Submitted (4/14/2023 9:54 AM, NT Requestor) - Completed
- OFAC Check - Completed
- Initial Validation Request - Completed
- Exception Approval - Active** (indicated by a location pin icon and a black arrow pointing to it)
- Purchasing Review - Future
- Department Approval - Future
- Sourcing and Contract - Future

The main content area shows details for the change request, including:

- Change Request Reason:** Price change
- Status:** Pending (Exception Approval)
- Submitted:** 4/14/2023 9:54 AM
- 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:** X
- Priority:** Normal
- Prepared by:** NT Requestor

Additional sections include Shipping (Ship To: NT Requestor, Discover Park Building) and Billing (Bill To: UNT System Business Service Center, 1112 Dallas Dr. Ste. 4200).