

Creating a Service Form Change Request Quick Guide

Shopping is Easy in UNT System Marketplace!

Creating a Change Request for a Service Form Quick Guide

UNT System Marketplace Shoppers and Requestors:

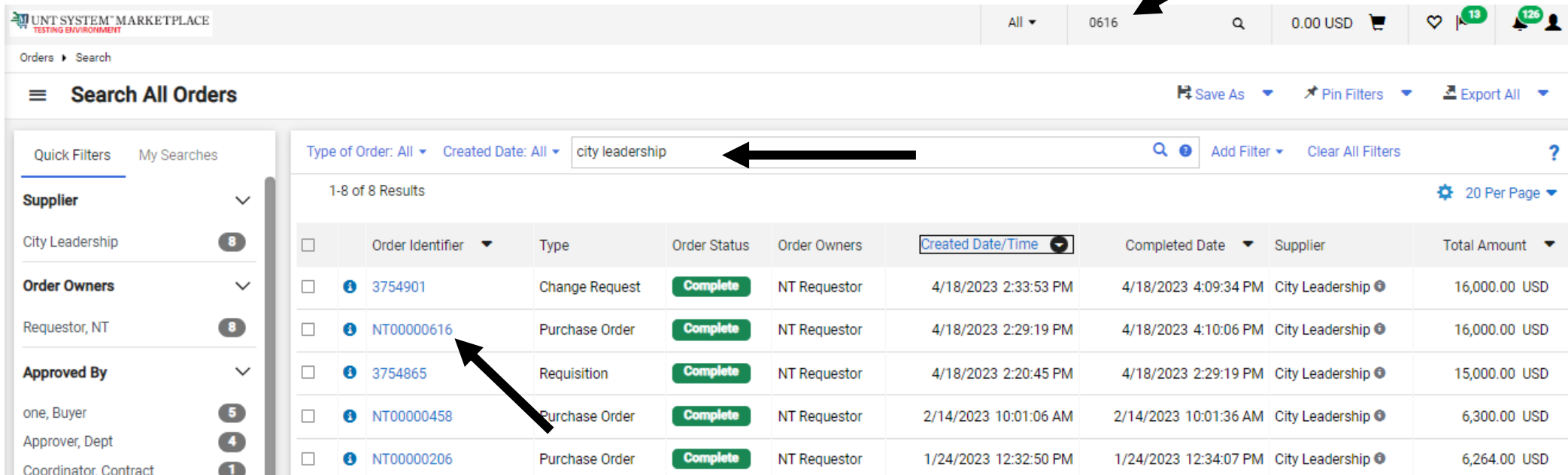
Requestors have additional permissions:

- 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 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. 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 UNT System Marketplace interface. At the top, there is a search bar with the text '0616' and a magnifying glass icon. Below the search bar, there are navigation options: 'All', '0616', '0.00 USD', and notification icons. The main content area is titled 'Search All Orders' and includes a search filter 'city leadership'. Below the search bar, there is a table of results with the following columns: Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, Supplier, and Total Amount. The table contains five rows of data, with the second row (NT00000616) highlighted by an arrow.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
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
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
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
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
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

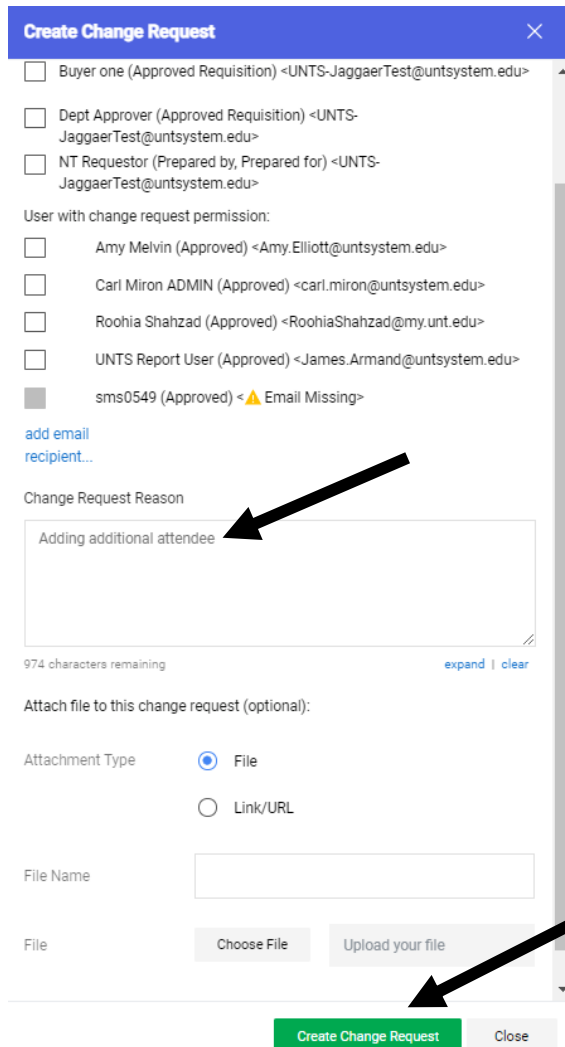
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From the Purchase Order, click on the three dots in the top right of the screen and click the link to 'Create Change Request'.

The screenshot displays the UNT System Marketplace interface for a Purchase Order (PO) titled "Purchase Order • City Leadership • NT00000616 Revision 1". The interface includes a navigation bar with tabs for Status, Summary, Revisions (2), Confirmations, Shipments, Change Requests (1), Receipts, Invoices, and Comments (1). The main content area is divided into three columns: General Information, Shipping Information, and Billing/Payment. The General Information column shows PO Business Unit as University of North Texas (NT752), PO/Reference No. as NT00000616, Revision No. as 1, Priority as Normal, and Supplier Name as City Leadership. The Shipping Information column shows Ship To as NT Requestor, Bldg/Rm: 213, UNT System Business Service Center, Denton, TX 76205, United States, and ShipTo Address Code as BSCS. The Billing/Payment column shows Bill To as invoices@untsystem.edu, UNT System Business Service Center, 1112 Dallas Dr. Ste. 4200, Denton, TX 76205, United States, and Billing Options as Net 30 (0% 0, Net 30). A dropdown menu is open in the top right corner, showing options: 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 blue arrow.

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		

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Create Change Request [Close]

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.

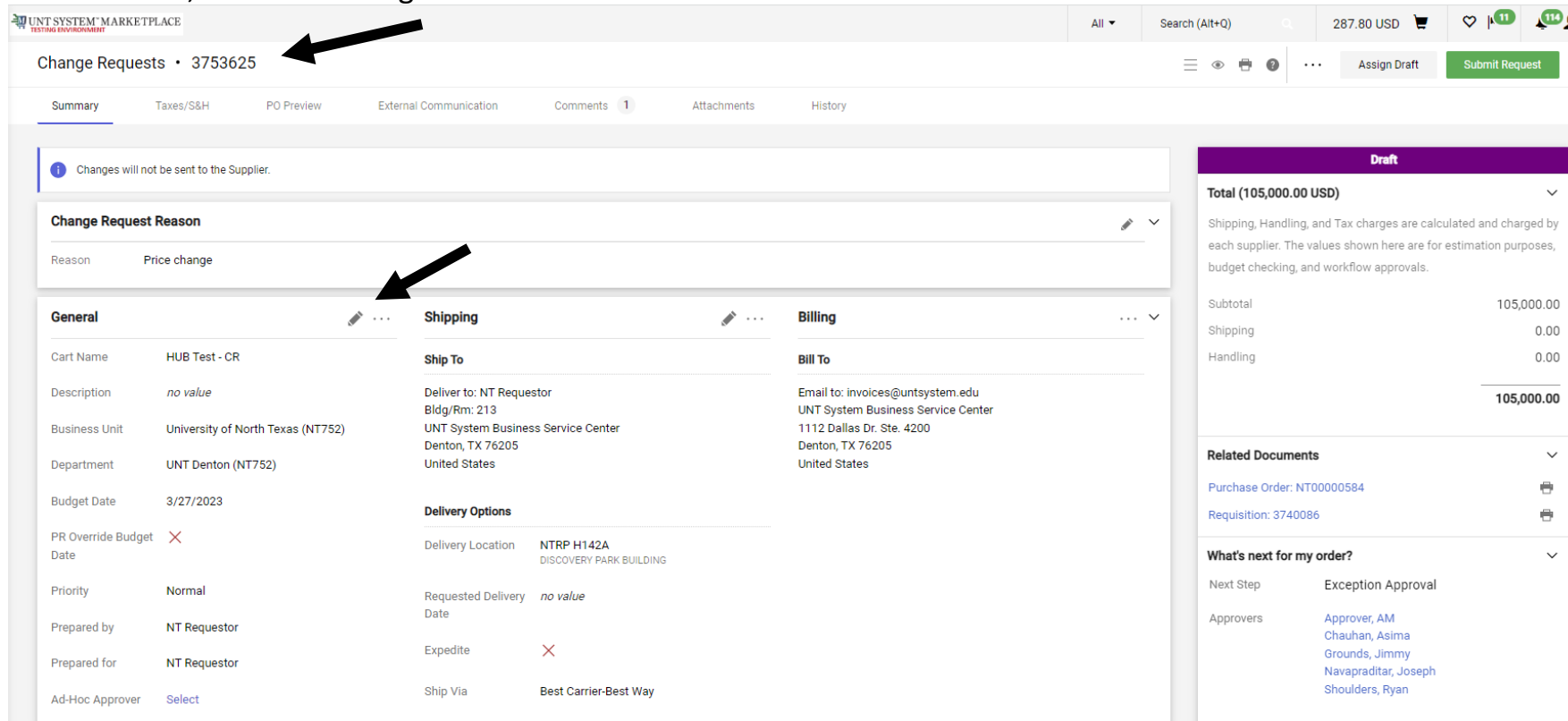
Required for this form:

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.

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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.



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
--------	--------------

General | **Shipping** | **Billing**

Cart Name	HUB Test - CR	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
Description	no value	Delivery Options	Delivery Location: NTRP H142A DISCOVERY PARK BUILDING		
Business Unit	University of North Texas (NT752)	Requested Delivery Date	no value		
Department	UNT Denton (NT752)	Expedite	✗		
Budget Date	3/27/2023	Ship Via	Best Carrier-Best Way		
PR Override Budget Date	✗				
Priority	Normal				
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

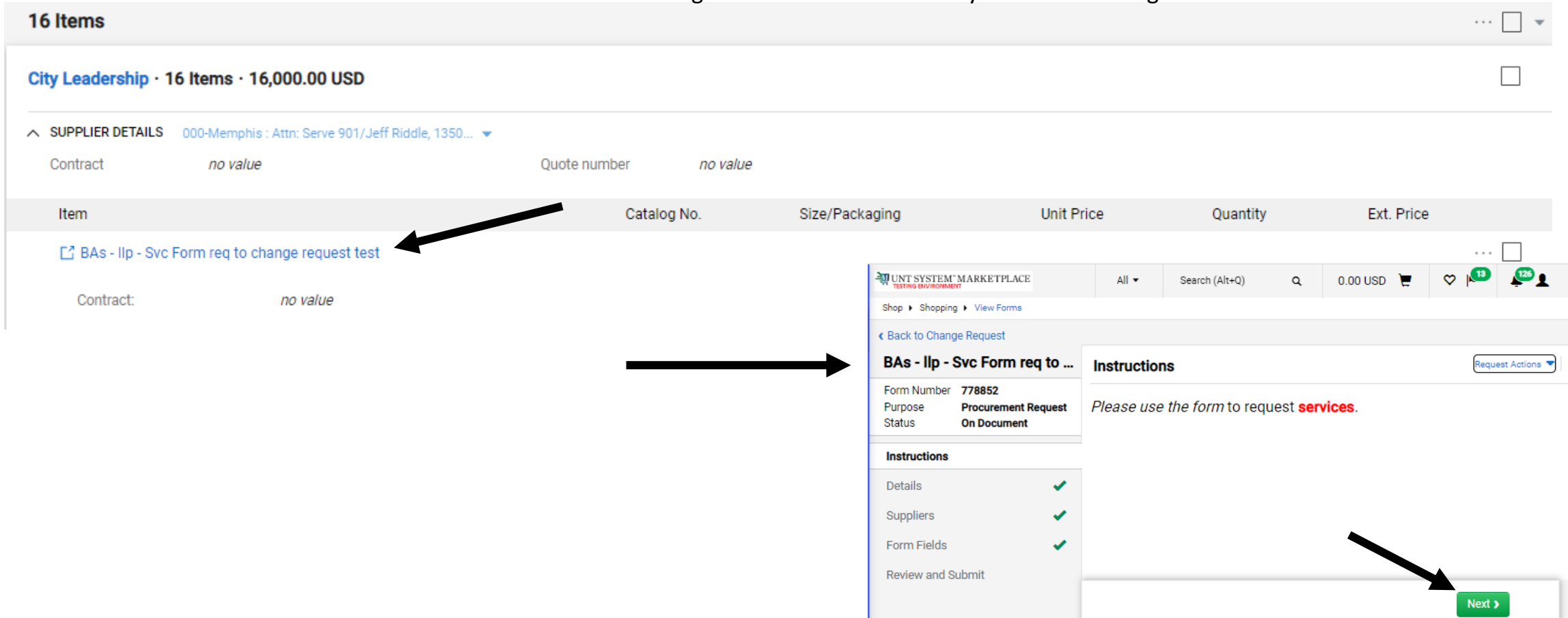
What's next for my order?

Next Step: Exception Approval

Approvers: Approver, AM Chauhan, Asima Grounds, Jimmy Navapraditar, Joseph Shoulders, Ryan

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.



The screenshot displays the UNT System Marketplace interface. At the top, it shows '16 Items' and a summary for 'City Leadership - 16 Items - 16,000.00 USD'. Below this, there are 'SUPPLIER DETAILS' for '000-Memphis : Attn: Serve 901/Jeff Riddle, 1350...'. A table lists items with columns for 'Item', 'Contract', 'Catalog No.', 'Size/Packaging', 'Unit Price', 'Quantity', and 'Ext. Price'. One item is highlighted: 'BAs - Iip - Svc Form req to change request test'. An arrow points from this item to a detailed view of the change request form. The form includes a 'Back to Change Request' link, the title 'BAs - Iip - Svc Form req to ...', and form details: 'Form Number 778852', 'Purpose Procurement Request', and 'Status On Document'. An 'Instructions' section states: 'Please use the form to request services.' A progress bar shows 'Details', 'Suppliers', and 'Form Fields' as completed with green checkmarks, and 'Review and Submit' as the current step. A green 'Next >' button is at the bottom right, with an arrow pointing to it.

Item	Contract	Quote number	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
BAs - Iip - Svc Form req to change request test	no value	no value					

Contract: no value

UNT SYSTEM™ MARKETPLACE
TESTING ENVIRONMENT

Shop > Shopping > View Forms

[Back to Change Request](#)

BAs - Iip - Svc Form req to ...

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

Instructions

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

Request Actions

Details ✓
Suppliers ✓
Form Fields ✓
Review and Submit

Next >

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Shop > Shopping > View Forms

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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.

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UNT SYSTEM™ MARKETPLACE

Shop ▶ Shopping ▶ View Forms

[Back to Change Request](#)

BA - 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](#)

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



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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 UNT System Marketplace interface for a change request. At the top, the header includes the logo, search bar, currency (0.00 USD), and notification icons. The main content area shows the change request details for ID 3755120, currently in 'Draft' status. A green confirmation banner at the bottom right reads 'Change Request 3755120 Submitted'. A black arrow points from the 'Submit Request' button in the top right to the confirmation banner. Another black arrow points from the 'Submit Request' button to the 'Submit Request' button itself.

Change Request Reason

Reason: Adding additional attendee

General	Shipping	Billing
Cart Name BAs - Ilp - Service Form - Change Request Test - CR(1)	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 UNT System Business Service 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
Description no value		
Business University of North Texas		

Summary

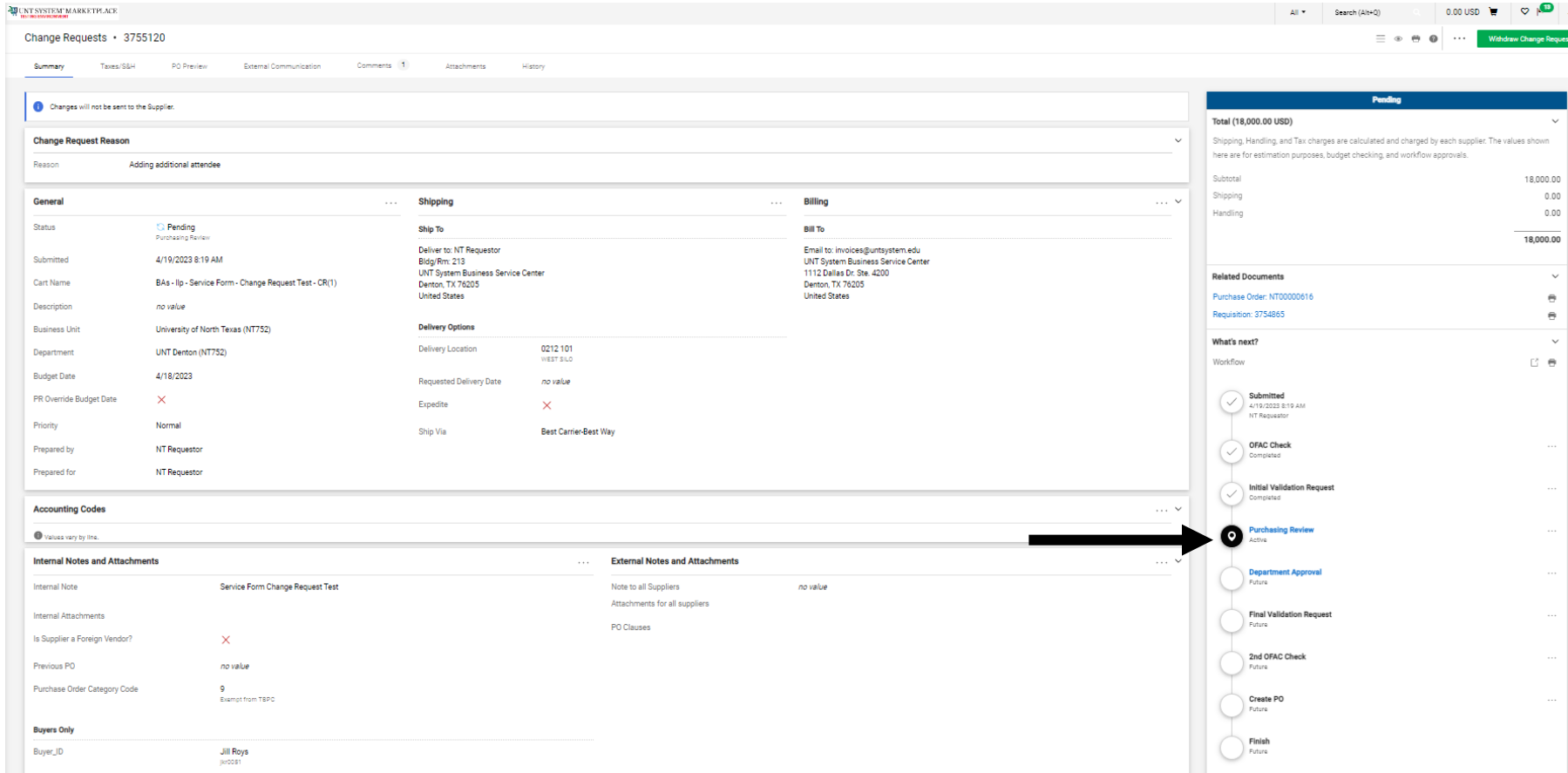
Change Request number	3755120
Change Request status	Pending
Cart name	BAs - Ilp - Service Form - Change Request Test - CR(1)
Change Request date	4/19/2023
Change Request total	18,000.00 USD
Number of line items	1

Options

- [Print](#)
- [Print preview](#)
- [Recent orders](#)
- [Return to your home page](#)

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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 3755120. The status is 'Pending' with a 'Purchasing Review' icon. The workflow on the right shows the current step as 'Purchasing Review' (Active), with a location icon next to it. A black arrow points from the 'Internal Notes and Attachments' section to this icon in the workflow.

Section	Field	Value
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
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
	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	Service Form Change Request Test
Buyers Only	Buyer_ID	Jill Roys (J0081)