

# Quick Reference Guide

Add a New Line to Change Request



A new "Add to Draft Change Request" action allows users to add a line item to a change requests, with the exception of punch out items.

#### **IMPACTED USER GROUPS:**

- Shoppers (PO Owner)
- Requesters (PO Owner)
- Buyers
- Accounts Payable

Note: For Shoppers & Requesters, only a PO owner can create a change request. Others can only create a change request comment.

#### **Purchase Order**

- 1. Open the Purchase Order you would like to change.
- 2. From the Menu option, select "Create Change Request". See below.



Please Note: The user must have at least one change request in Draft status to add a new line to it.

## **Shopping Home Page**

3. Go to CSUBUY's "Shopping Home Page", click on the Request Form, and add the new items / lines. Once complete, go to the "Review and Submit" section of the Form Request, click on the drop down for "Add and go to Cart", and select "Add to Draft Change Request". See below.



Goods and Services R	equ	Review and Submit			He	Quest Account • Financial F				
Form Number 1050342 Purpose Procurement Request Statum		Required Fields Complete								
Status Incomplete										
Instructions		Section	Progress							
Suppliers		Suppliers	<ul> <li>Required Fields Complete</li> </ul>							
Form Fields		Form Fields	<ul> <li>Required Fields Complete</li> </ul>							
General Information	~									
Other Goods & Services	~									
Cost Details	<ul> <li>Image: A second s</li></ul>					~				
Review and Submit	4									
				< Previous	Add to Favorites	Add and go to Cart				
						Add and go I Show menu				
						Save to Cart and Add Another				
						Add to Cart and Return				
						Add to new Cart				
						Add to Draft Cart or Pending PR/PO				
					3	Add to Draft Change Request				
						Add to PO Revision				

#### Form Request

4. Selecting the action will open the "Add to Draft Change Request" overlay. A list of change requests in Draft status that are owned by the logged-in user, with the same supplier as the item(s) to be added is displayed. Select a change request and click "Add to Change Request". An error message is displayed if there are no suitable change requests.

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Add to Draft Change Request       Image: Change Request to which the the selected line tren(r) are to be added.         Image: Change Request Image: Change: Change Request Image: Change Request Image: Change Request Imag	ttps://usertest.sciquest.com/apps/Router/AddDocLineItemPo			$\land$
Draft Change Request     7       Select     Change Requests       2024-12-17 tmobride 01 - CR (4185903)	Add To Draft Change Request Please select the appropriate Change Request to whice Please select the term (a) are to be added.	h the	Clos	чe
	1 Change Request 2024-12-17 trachride 01 - CR (416592) Add To Change Request 2024-12-17 trachride 01 - CR (416592)	7		

The Item is added to the Draft Change Request.

Please Note: An item can only be added to draft change requests that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added. An error message will be displayed if there are no suitable change requests.

Additionally, the Form Request must align with the Form Request Type of the original Purchase Order (PO), if not, an error message will also be displayed.

#### **Purchase Order**

5. Return to the Purchase Order you initiated the Change Request for and open it.



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6. Click on the "Change Requests" tab and open the Change Request. See Below.

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Purchase (	Order • Acm	e Corporation •	240002832T Rev	vision 0	1					
Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests 1	Receipts	Vouchers	Comments 1	Attachments	
Records	found: 1								+	
Status		Number	2	Owner		Created				
Draft		4185393	2	Tonya McBride		12/17/2024			Ť	

 Review the newly added item/line along with its associated details. Once you are done, click "Submit Request". The Change Request will proceed through the requisition workflow, followed by updates in the PO workflow, and then export to CFS.

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Summary Tax	es/S&H PO	Preview	External Communicati	on Corr	iments 1	Attachments	History					2	2
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## Help & Support

Open a Ticket Using <u>ServiceNow</u>.