Creating Change Requests in JavelinaBuy

What is a Change Request?

A change request is available for a department allocator to initiate changes on a purchase order that will route for the appropriate approval.

What can be revised with a Change Request?

The change request is used when the following PO revisions are needed:

1. The account needs to be updated. This includes splits, complete account changes and line-item account additions/revisions.
2. The item description needs to be revised.
3. The quantity needs to be increased/decreased
   a. This will replace the cancel receipt option
4. The receipt method (quantity to cost) needs to be revised
5. Internal/External Notes or Attachments Need to be added.
   a. If you only need to add an internal attachment or note a change request is not required. This can be completed through the comments
6. Ship to Address updates

What cannot be revised with a Change Request?

1. Punch-out items
   a. If the quantity needs to be reduced, you can process the change request and add an internal note on the line item that needs to be revised. The items will then be cancelled from the PO in a manual revision by the back office.

Instructions on Making the Change Request
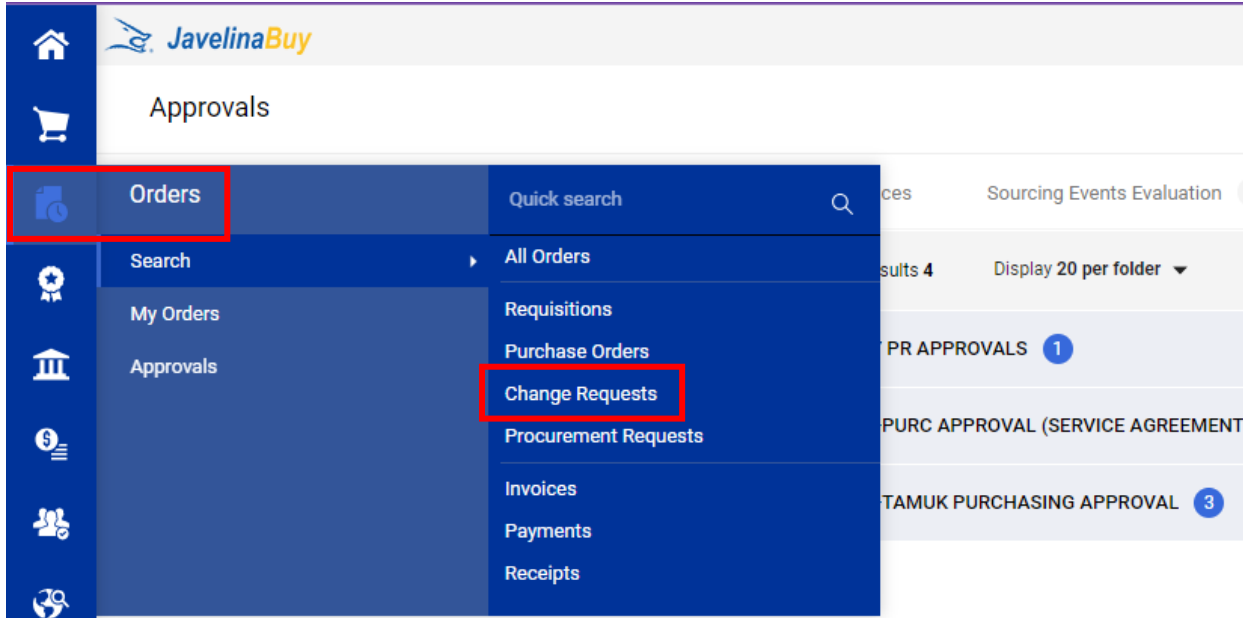
Step 1: Log in to the JavelinaBuy Platform

a. Open a web browser and navigate to the JavelinaBuy platform.

https://sso.tamus.edu/main.aspx

b. Enter your credentials (username and password) to log in to the system.

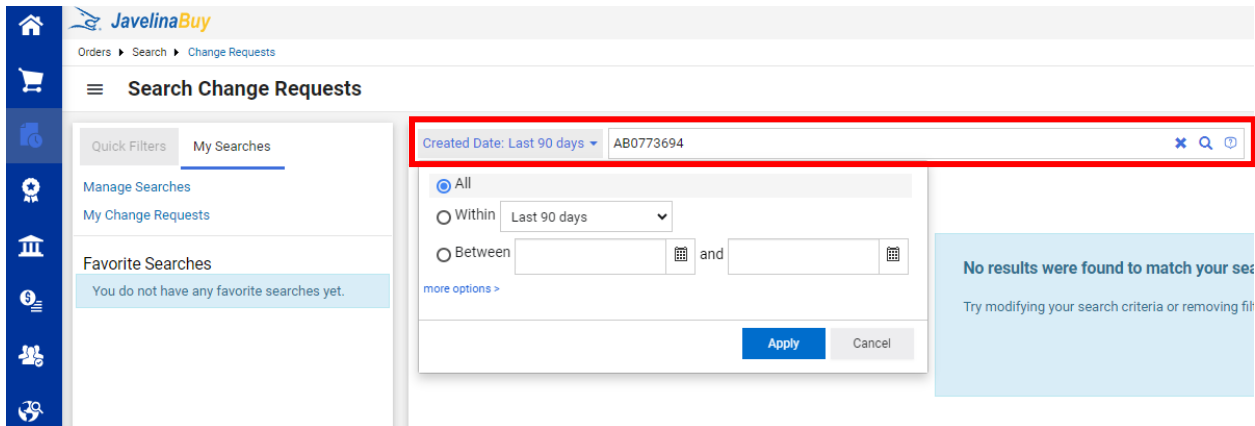**Step 2: Access the Change Request Section**

a. Once logged in, navigate to the appropriate section in JavelinaBuy to create a change request.

b. This section may be labeled as "Change Requests," "Modify Order," or similar.

Step 3: Identify the Purchase Order or Contract

a. Search for and identify the specific purchase order or contract that requires a change.
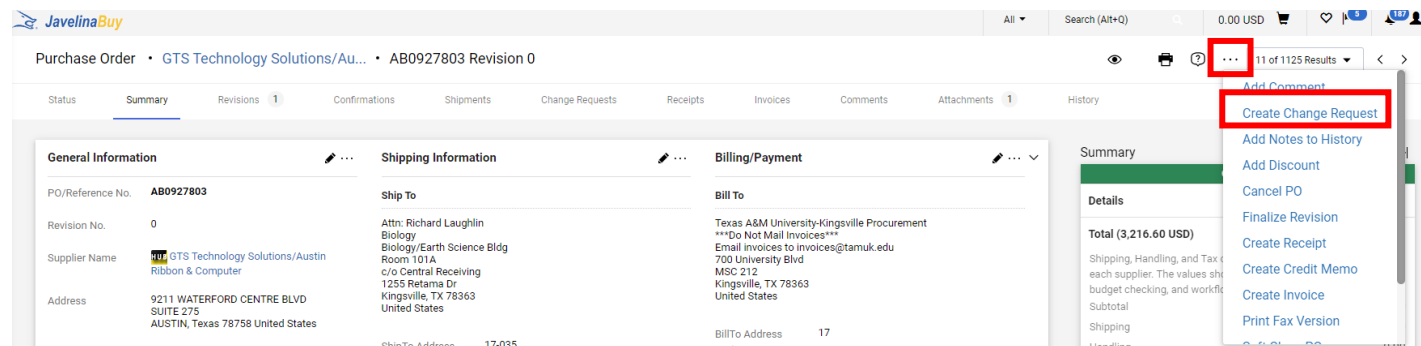

b. Note: when searching for the PO, make sure the date frame selected is "all" as "Last 90 Days" is generally the auto selection. Click apply.

c. The PO should be listed on the far right under PO numbers. Click on the PO needed for change.

Step 4: Create a New Change Request

a. Click on the three (…) at the top right corner of the PO summary page to create a new change request.

b. Fill in the required information, including the purchase order or contract number, the reason for the change, and a detailed description of the requested modification. A reason is required for any change request to be submitted.
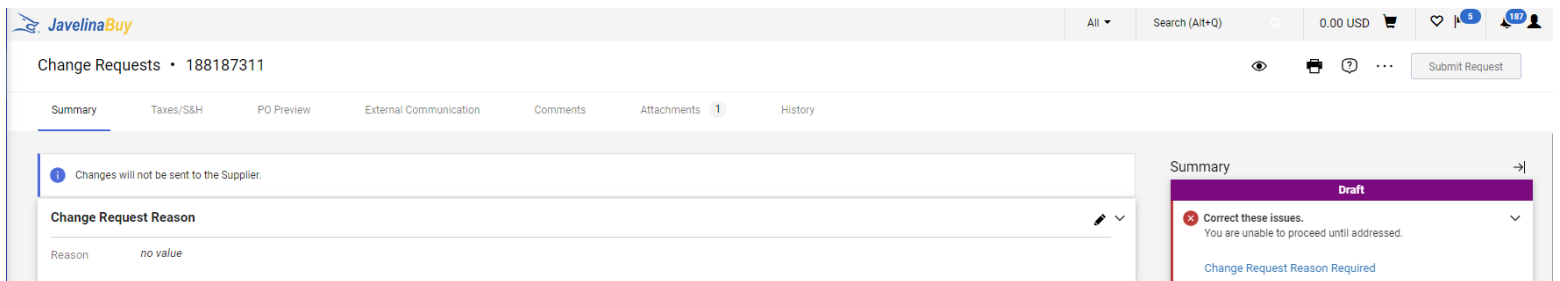
Please Note: *A Change Request cannot be completed to alter the supplier's name, address, or supplier information.*

Before a Change Request is submitted: For a supplier to receive the revised PO the "External Communication" tab at the top must have all boxes selected.

To Reopen a PO: Once a PO is completed and paid in full, but an extension to the PO needs to be added, you must email purchasing@tamuk.edu for the request to reopen and explain the need.

c. Specify the desired changes, such as quantity, price, delivery date, or any other relevant details.

d. Attach any supporting documents or files related to the change request.

- Revised Contract
- Revised Quote or Invoice showing Change (email correspondence will not suffice)

Step 5: Review and Validate the Change Request

a. Review all the entered information and attached documents for accuracy and completeness.

b. Validate that the change request adheres to the organization's procurement policies and guidelines.

c. Make any necessary corrections or additions before final submission.

Step 6: Submit the Change Request

a. Once the change request is reviewed and validated, submit it through the designated submission process in JavelinaBuy.

b. Follow the instructions provided on the platform for submitting the request.

Step 7: Track and Monitor the Change Request

a. Monitor the status of the change request in JavelinaBuy.

b. Check for any updates, notifications, or requests for additional information from the appropriate stakeholders.

c. Respond promptly and provide any required information or clarifications.

Step 8: Document and Communicate the Change

a. Once the change request is approved and processed, document the changes made to the purchase order or contract.

b. Communicate the approved changes to the relevant parties, such as suppliers, internal stakeholders, or the finance department (if necessary).

c. Update any associated documentation, such as delivery schedules, budgets, or invoices, as necessary.

*<u>**Note:**</u> Make sure the new invoice you receive matches the changed PO.*