

# iShopUTRGV Quick Reference Guide

## How to - Modify a line on a Purchase Order

UTRGV iShop now allows users to modify lines for PO's whether they have been paid or not. This is a new feature that was introduced with the recent iShop upgrade Effective 03.18.24. The process to modify lines without invoices continues to be the same as before.

For PO's that have been paid, however, changes are limited to the following scenarios:

Adding a new line - Refer to How to add a new line guide for the step-by-step procedure.  
Increase in Price or in Quantity – Steps are described below.

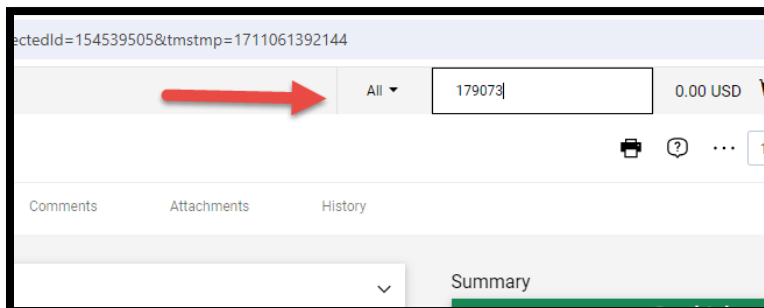


Enough budget should be available in the cost center/project. iShop will process the change only if the total of PO is available in the account. For example: if the existing PO is for \$2,000, but you now need to add freight in the amount of \$100, even though the increase is only for \$100 iShop will perform the budget check for the whole PO amount of \$2,100 instead of just the freight amount of \$100 only. Thus, if the account does not have the total amount (in this example \$2,100), user should submit a new PO instead to pay for the freight separately. When submitting the new PO, iShop will perform the budget check for the new order amount of \$100.

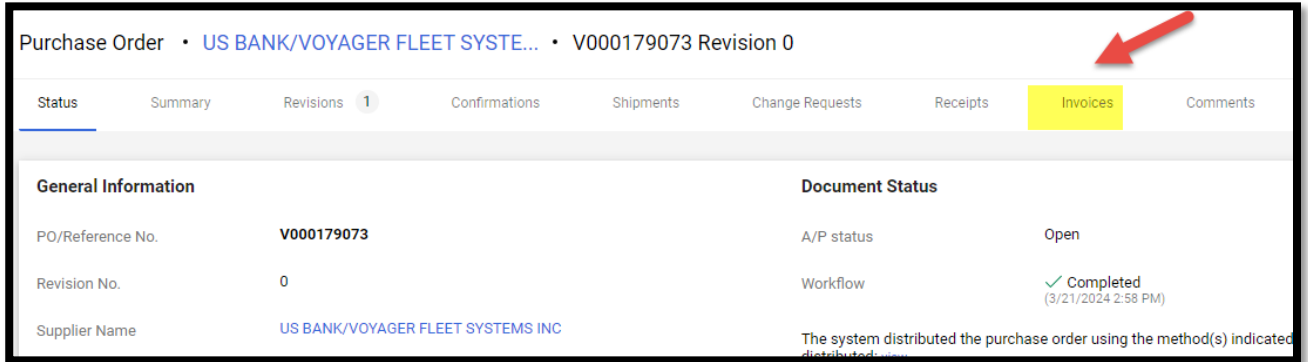
Users can check on payments by looking at the "Invoice tab" on the PO record in iShop. Please review the invoice tab and make changes as needed to match the quote or the invoice received from vendor. See steps below.

For questions, please send an e-mail to Esmeralda Rios at [esmeralda.rios@utrgv.edu](mailto:esmeralda.rios@utrgv.edu) or to [iShop@utrgv.edu](mailto:iShop@utrgv.edu)

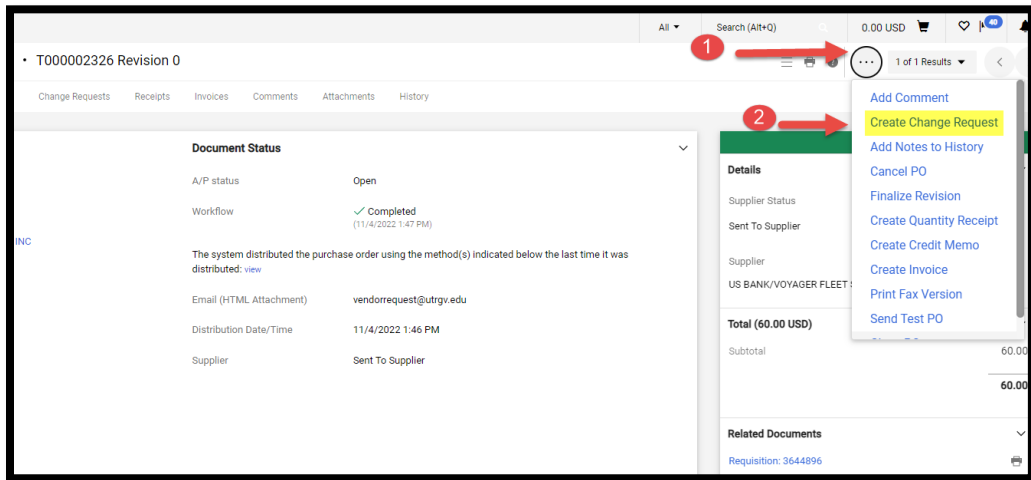
1. Set the Document Search to show "ALL". Enter the PO number in the Quick Search Bar and select the PO number. See sample below.



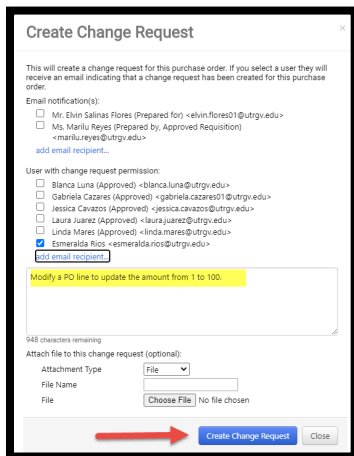
- Please review the invoice tab to see the status of the invoice if any. **Decreases can be made only if the invoice is not paid.**



- Click on menu to submit Change Requests. This option has been moved to the right side of the screen to a document action icon displayed with three dots (...). See sample below. Select Create Change Request.



- Select the employee that you would like to notify about this change. Enter description for the change. See sample below. Click on Create Change Request.



- Scroll down to the lines section. Click on the Item description line to access the form.  
**Note: Orders made using our showcased suppliers cannot be changed.** Update to increase the Qty and/or price field as needed. Decreases can be made only if the invoice is not paid. Save the changes and scroll up to the top of the page.

**Non Catalog Item**

US BANK/VOYAGER FLEET SYSTEMS INC

**Fulfillment Address**

**Item**

Product Description *	Catalog No.	Product Size	Quantity *	Price Estimate	Packaging *
test 250 characters remaining	1	1	2	1.00	1 EA - Ea

**Additional Details**

Taxable  Capital Expense  Product Flags  
 Controlled substance  
 Recycled  
 Hazardous material

Commodity Code: 15100000  
 Manufacturer Name:

- Scroll up to the top of the page. Submit the request.

Change Requests • 3397735

Submit Request

Changes will not be sent to the Supplier.

**Change Request Reason**

Reason: Test - To cancel one line

**General**  
 Cart Name: 2021-11-02 Jaggaer 21.3 Jaggaer Upgrade - CR(1)

**Shipping**  
 Ship To: Attn: Mrs. Esmeralda O Rios, Department Procurement Office

**Billing**  
 Bill To: Accounts Payable - Office of Finance and Public Policy, 1201 W. University Drive

**Total (500.00 USD)**  
 Subtotal: 500.00  
 Total: 500.00

- Change request submitted notification will be displayed. Note this shows the Change Request number. Click on the Change Request number to see who needs to approve. You can send an e-mail to the approver to expedite the approval process.

Change Request 3400260 Submitted

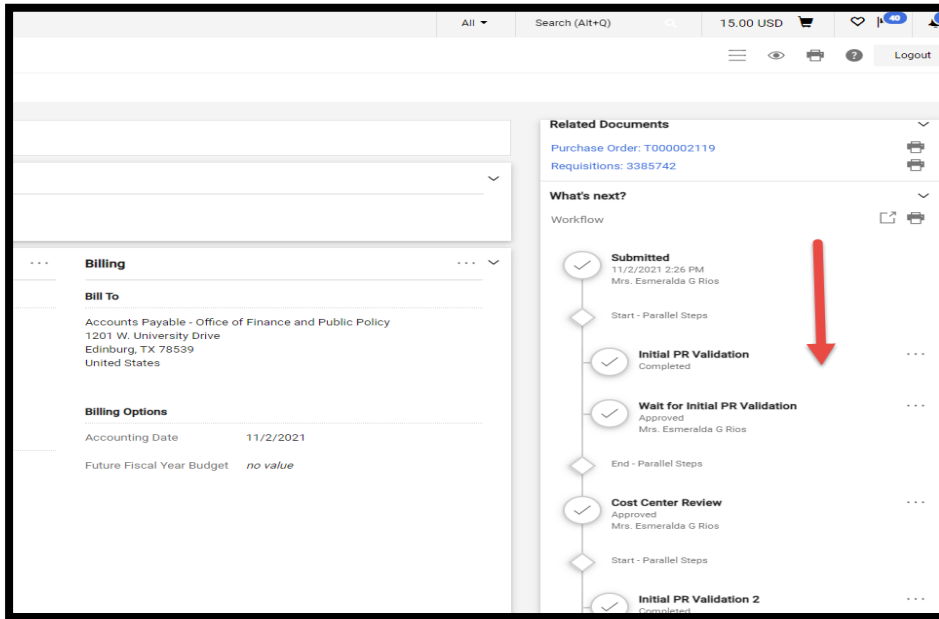
**Summary**

Change Request number: 3400260  
 Change Request status: Pending  
 Cart name: 2021-11-03 6001136182 02 - CR  
 Change Request date: 11/11/2021  
 Change Request total: 30.00 USD  
 Number of line items: 1

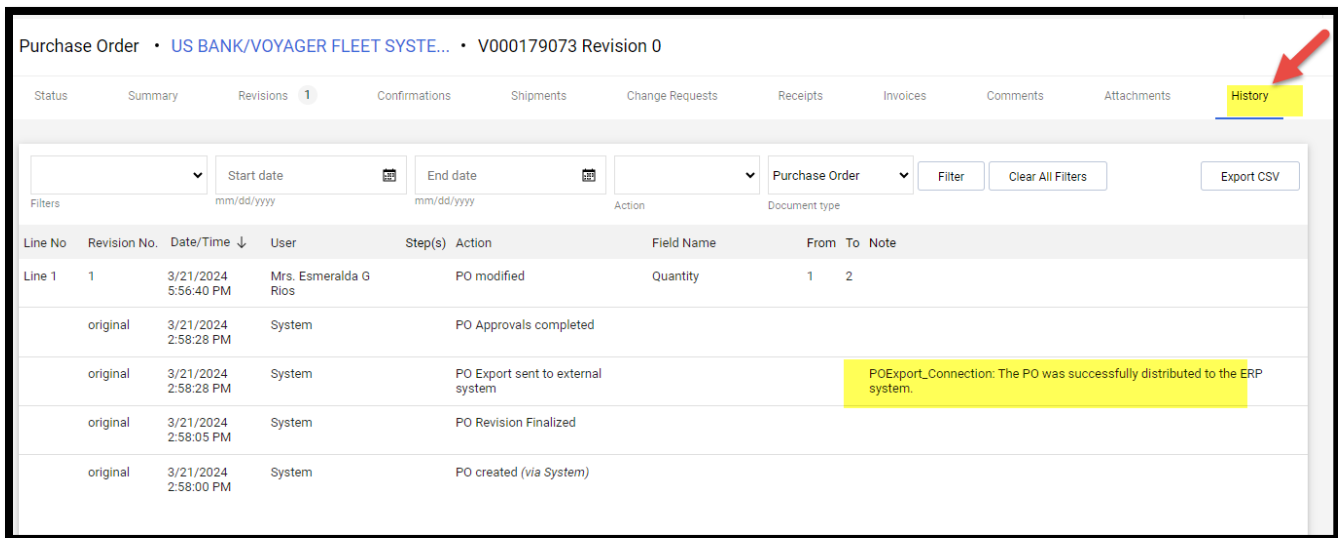
**Options**

Print  
 Recent orders  
 Return to your home page

8. This is the workflow. The account manager’s approval is required for any increase. The system will update the PO when the Change Request workflow approval is completed.



9. Users should review the History tab to make sure there’s no errors or to verify the change was exported into Peoplesoft after the change was fully approved. See sample below.



The change will be reflected after the Account Manager approves this change. Users may refer to the “How to verify the PO Change in Peoplesoft” guide to see the change reflected in the financial records after Change Request is fully approved. Here is the link. <https://www.utrgv.edu/procurement/files/documents/quick-reference-guides/ishop/ps-esmeralda-03.21.2024-how-to-verify-the-po-change-in-peoplesoft-1.docx>

For questions, please send an e-mail to Esmeralda Rios at [esmeralda.rios@utrgv.edu](mailto:esmeralda.rios@utrgv.edu) or to [iShop@utrgv.edu](mailto:iShop@utrgv.edu)