iShopUTRGV™ *Quick Reference Guide*

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

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 <u>make changes as needed to match the quote or the invoice received from vendor</u>. See steps below.

For questions, please send an e-mail to Esmeralda Rios at esmeralda.rios@utrgv.edu or to 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.
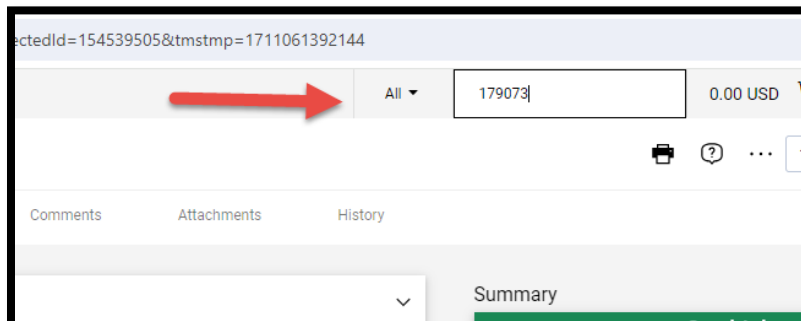
2. Please review the invoice tab to see the status of the invoice if any. The system will show if the invoice is pending or paid.
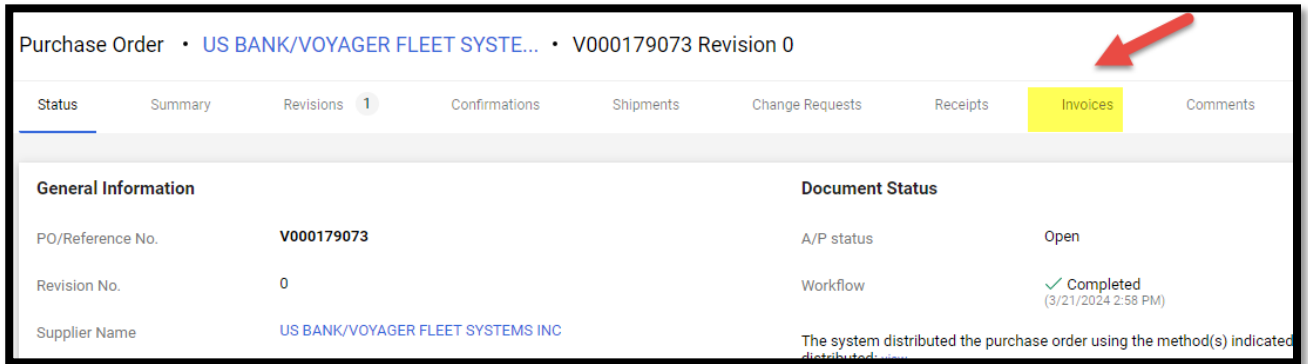
3. Click on menu to submit Change Requests. This option has been moved to the right side of the screen to a document action icon displayed with three dots (…). See sample below. Select Create Change Request.
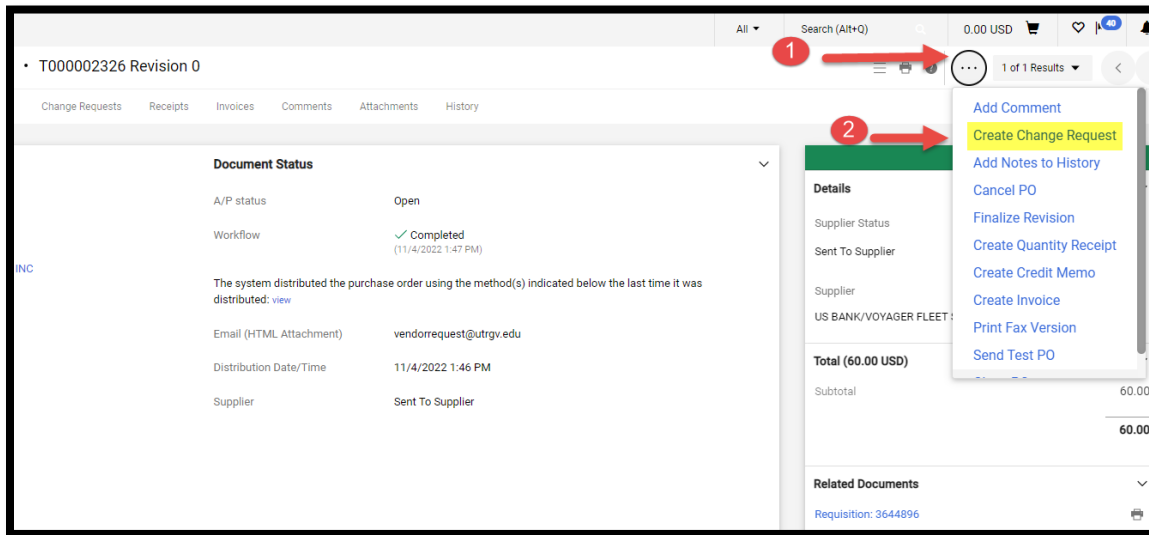
4. Select the employee that you would like to notify about this change. Enter description for the change. See sample below. Click on Create Change Request.

5. Scroll down to the lines section. **Click on the three dots and select ADD Non-catalog item as shown below.**

   Note: Orders made using our showcased suppliers cannot be changed

6. Fill in the product description and the rest of the fields. Save the changes.

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

8. 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.
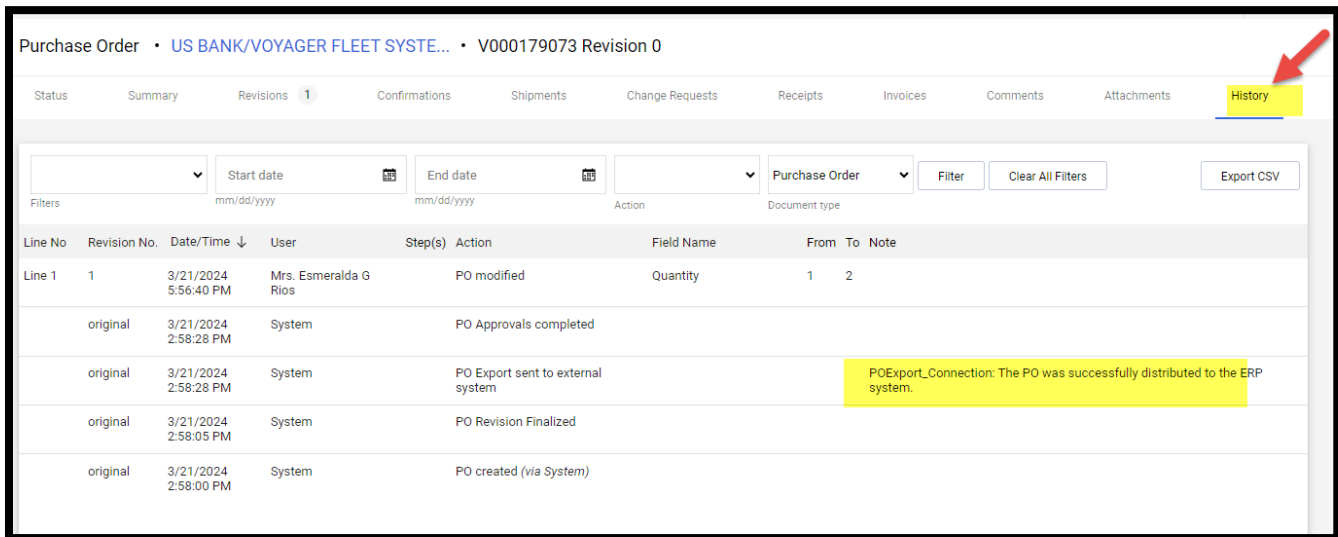
9. This is the workflow. The account manager's approval is required for any increase. The system will update the PO when the Change Request workflow approval is completed.
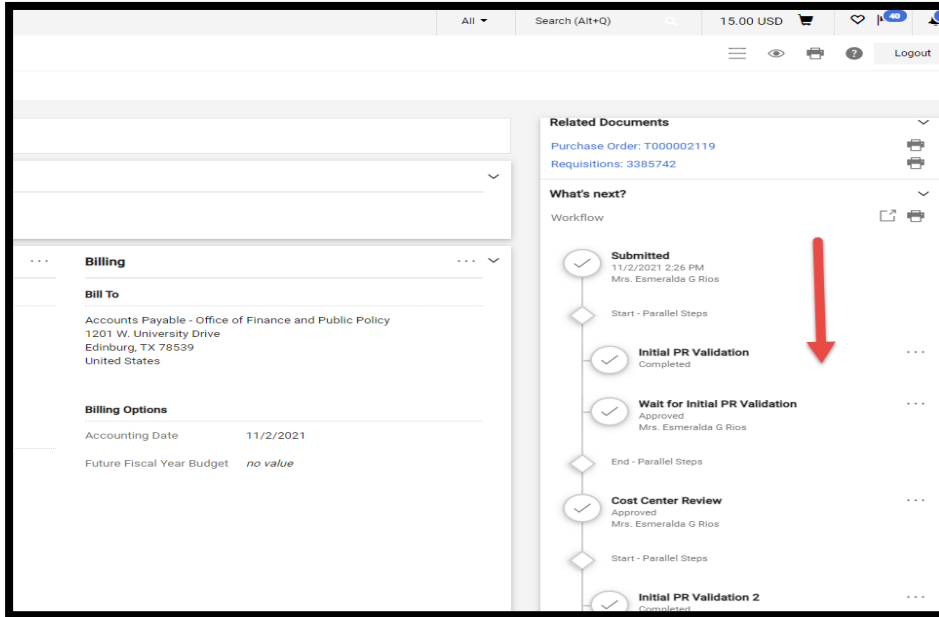
10. Users should review the History tab to make sure there's no errors or to verify the change was exported into Peoplesoft after the change was fully approved. See sample below.

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

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