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.

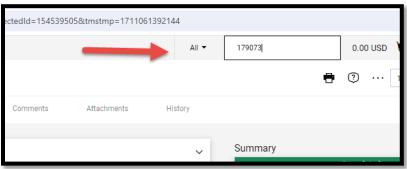


Enough budget should be available in the cost center/project. iShop will process the change only if the total of PO is available in the account. For example: if the existing PO is for \$2,000, but you now need to add freight in the amount of \$100, even though the increase is only for \$100 iShop will 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</u> <u>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.

Purchase C	order • US B/	ANK/VOYAGER FI	LEET SYSTE • V	/000179073 R	evision 0					
Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests	Receipts	Invoices	Comments		
General Inf	ormation			Document S	Document Status					
PO/Referenc	e No.	V000179073			A/P status		Open			
Revision No.		0			Workflow		Completed (3/21/2024 2:58 P	M)		
Supplier Nan	ne	US BANK/VOYAGE	R FLEET SYSTEMS INC		The system di	stributed the purch	ase order using the	e method(s) indicated		

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.

			All 👻	Search (Alt+Q)	0.00 USD 📜 🗢 🏴 🧍
• T000002326 Revision 0					··· 1 of 1 Results ▼ <
Change Requests Receipts	Invoices Comments Attach	ments History		2	Add Comment Create Change Request
	Document Status		~	Details	Add Notes to History Cancel PO
	A/P status Workflow	Open ✓ Completed (11/4/2022.147 PM)		Supplier Status Sent To Supplier	Finalize Revision Create Quantity Receipt
INC	The system distributed the purchas distributed: view	e order using the method(s) indicated below the last time it was		Supplier US BANK/VOYAGER FLEET :	Create Credit Memo Create Invoice
	Email (HTML Attachment) Distribution Date/Time	vendorrequest@utrgv.edu 11/4/2022 1:46 PM		Total (60.00 USD)	Print Fax Version Send Test PO
	Supplier	Sent To Supplier		Subtotal	60.00 60.00
				Related Documents	~
				Requisition: 3644896	÷

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.

/i:	Create Change Request $\qquad \qquad \qquad$										
	This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.										
	Email notification(s) Add recipient										
I	Mrs. Esmeralda G Rios (Prepared by, Approved Requisition, Prepared for) <esmeralda.rios@utrgv.edu></esmeralda.rios@utrgv.edu>										
	User with change request permission:										
I.	Daisy Belmares (Approved) <daisy.belmares01@utrgv.edu></daisy.belmares01@utrgv.edu>										
ł	Jessica Vanessa Rodriguez (Approved)										
I.	Lisa Denise Price (Approved)										
	<lisa.mendiolaprice01@utrgv.edu> Ryan Ethan Garcia (Approved) <ryan.garcia08@utrgv.edu></ryan.garcia08@utrgv.edu></lisa.mendiolaprice01@utrgv.edu>										
I.	Vikki Penix (Approved) <vikki.penix@utrgv.edu></vikki.penix@utrgv.edu>										
L	add email recipient										
	Change Request Reason										
l	Need to add a new line to pay for freight										
L	959 characters remaining expand clear										
	Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.										
l	Attach file to this change request (optional):										
	Attachment Type 💿 File										
	O Link/URL										
	Create Change Request Close										

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

mmary PO P	Preview External C	communication Com	nments 1 Attac	chments History					
beed Chart	Account	Department	Project-Activity	Cost Center	TIBH	Supplier?	Profile ID		
050059 S-Procurement	63007 Fuels & Lubricants	208040 Procurement Office	no value	31050059 DES-Procurement	N/A Not Applicable	N/A Not Applicable	no value		Summ
ernal Notes and A	ttachments			·· Supplier Notes a	nd Attachments			ø v	Total
ernal Note	no value			Note to all Supplier	s no value	r			Shippi each s
ernal Attachments	Add			Attachments for all	l suppliers Add				budge
				PO Clauses	1 Vie	ew details			Subto
Itoms								🗆 🗸	
Items								🗆 💌	Relat
	R FLEET SYSTEMS IN	IC · 2 Items · 2.00 USD	,						
S BANK/VOYAGE		IC · 2 Items · 2.00 USD					1		Durch
S BANK/VOYAGE		ER FLEET SYSTEMS INC, PO B		179073			1		Relate Purch
S BANK/VOYAGE SUPPLIER DETAILS Contract	RMO-KANSAS-01 : VOYAGE	ER FLEET SYSTEMS INC, PO B P(O Number V0001	179073			1		-Catalog It What
S BANK/VOYAGE	RMO-KANSAS-01 : VOYAGE	ER FLEET SYSTEMS INC, PO B P(179073			1		Purch I-Catalog It What' Next :
S BANK/VOYAGE SUPPLIER DETAILS Contract	RMO-KANSAS-01 : VOYAGE	ER FLEET SYSTEMS INC, PO B P(O Number V0001	179073 Size/Packaging	Unit Pric	e Quantity	Ext. Price		Purch I-Catalog It What' Next :
S BANK/VOYAGE SUPPLIER DETAILS Contract Quote number	RMO-KANSAS-01 : VOYAGE	ER FLEET SYSTEMS INC, PO B P(O Number V0001 O Clauses		Unit Pric		Ext. Price		Durch

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

Add Non-Catalog Item							×	
US BANK/VOYAGER FLEET SYSTEMS IN							Î	
Fulfillment Address							>	
Item 17 items have been found containing '1' in	n their Catalog No. View all in search results	3					~	ł
Product Description *	Catalog No. Produ	ict Size	Quantity	r ★ Price Estimate	Packaging *			
Freight 247 characters remaining	1		▼ 1	100	1 EA - E	ach 🗸		
Additional Details							~	
Taxable		Capital Expense			Product Flags			
Commodity Code	Q	Manufacturer Name			Recycled			
Manufacturer Part No		UNSPSC			 Hazardous material Radioactive 			

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

							۵	•	Search	(Alt+Q)	۹.	0.00 USD	. ♥	• •
Change Requests • 3	3397735 -							= @	•	0	Logout	Assign Draft	Submit	Request
Summary PO Preview	External Communication Co	omments 🕕	Attachments H	History										
 Changes will not be sent 	to the Supplier.											Draft		
									Total	(500.00) USD)			~
Change Request Reaso	_													
Change Request Reaso	n							~	Subto	stal				500.00
Reason	Test - To cancel one line													
														500.00
General		ø	Shipping		Ŵ	 Billing	ø	~	Relat	ed Docu	uments			~
Cart Name	2021-11-02 Jaggaer 21.3 Jaggae Upgrade - CR(1)	er	Ship To			Bill To					er: T00000211 3385742	9		-
Description	no value		Attn: Mrs. Esmeralda Department Procure			Accounts Payable - Office of Finance and Public Policy 1201 W. University Drive			What	's next f	or my order?			~

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.

Summary		Options
Change Request number	3400260	📮 Print
Change Request status	Pending	Recent orders
Cart name	2021-11-03 6001136182 02 - CR	Return to your home page
Change Request date	11/11/2021	
Change Request total	30.00 USD	
Number of line items	1	

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.

	All 👻	Search (Alt+Q)	ο,	15.00	USD	Æ	Q	hao 🕇
				\equiv	۲	•	?	Logout
		Related Docum	ents					~
		Purchase Order: Requisitions: 33		19				
	~	What's next?						~
		Workflow						C 🖶
 Billing	~~ ~		itted 2021 2:26 PM smeralda G R					
 Bill To								
Accounts Payable - Office of Finance and Public Policy 1201 W. University Drive		Start -	Parallel Step:	5		L		
Edinburg, TX 78539 United States			nitial PR Va Completed	lidation				
Billing Options			Wait for Init	ial PR Va	lidatio	n		
 Accounting Date 11/2/2021		,	Ars. Esmeralo	ta G Rios				
Future Fiscal Year Budget no value		End - F	arallel Steps					
		Approv	Center Revi ved smeralda G R					
		Start -	Parallel Step:	5				
			nitial PR Va	lidation 2	2			

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.

Status	Summ	nary Revi	sions 1	Confirmations	Shipments	Change Requests	Receipts		Invoices	Comments	Attachments	History
Filters		✓ Start o mm/dd/y		End mm/dd	date 🗰	Action	urchase Or		✓ Filter	Clear All Filters		Export CSV
Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To I	Note			
Line 1	1	3/21/2024 5:56:40 PM	Mrs. Esmeralda G Rios		P0 modified	Quantity	1	2				
	original	3/21/2024 2:58:28 PM	System		PO Approvals completed							
	original	3/21/2024 2:58:28 PM	System		PO Export sent to external system	I			POExport_Connee system.	ction: The PO was suc	ccessfully distribute	ed to the ERP
	original	3/21/2024 2:58:05 PM	System		PO Revision Finalized							
	original	3/21/2024 2:58:00 PM	System		PO created (via System)							

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. <u>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</u>

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