## iShopUTRGV Quick Reference Guide

## How to - Cancel a Line on a Purchase Order

iShop UTRGV allows users to cancel lines that have not been paid. Common reasons for cancelling PO lines include incorrect items not received or needed. Once a PO line is cancelled, it cannot be re-instated. Please review the invoice tab and <u>make changes</u> <u>only if **no** invoice is included</u>. If invoices are included, the PO change should not be submitted because the system will place the PO in error. Also, 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 questions, please send an e-mail to Esmeralda Rios at <u>esmeralda.rios@utrgv.edu</u> or to <u>iShop@utrgv.edu</u>.

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



2. Please review the invoice tab and <u>make changes only if **no** invoice is included</u>. If invoices are included, the PO change should not be submitted because the system will place the PO in error.

Purchase Order 👻 : T000001914								
Status Summary Revisions 2 Shipments Change Reque	sts 🜒 Receipts 🌒 Invoices Comments 🜒 Attachments History							
General Information								
PO/Reference No.	T000001914							
Revision No.	1							
Supplier Name	SPRINT PCS							
Purchase Order Date	9/23/2020							
Total	250.00							
Owner Name	Ms. Ayla Celeste Ortiz							
Owner Phone	+1 956-665-2692							
Owner Email	ayla.ortiz@utrgv.edu							

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 📜 🗢 🏴 4
• T000002326 Revision 0					1 of 1 Results • <
Change Requests Receipts	Invoices Comments Attach	ments History		2	Add Comment Create Change Request
INC	Document Status A/P status Workflow The system distributed the purchase distributed: view Email (HTML Attachment)	Open Completed (11/4/2022 1/47 PM) e order using the method(s) indicated below the last time it was vendorrequest@utrgv.edu	~	Details Supplier Status Sent To Supplier Supplier US BANK/VOYAGER FLEET	Add Notes to History Cancel PO Finalize Revision Create Quantity Receipt Create Credit Memo Create Invoice Print Fax Version Send Test PO
	Distribution Date/Time Supplier	11/4/2022 1:46 PM Sent To Supplier		Subtotal Related Documents	
				Requisition: 3644896	0

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

Create Change	Request	×
This will create a change requ receive an email indicating the order. Email notification(s): Mr. Elvin Salinas Flores Ms. Marilu Reyes (Prep <marilu.reyes@utrgv.e add email recipient User with change request perr</marilu.reyes@utrgv.e 	est for this purchase order. If you select a user they will t a change request has been created for this purchase (Prepared for) <elvin.flores01@utrgv.edu> ared by, Approved Requisition) du&gt;</elvin.flores01@utrgv.edu>	
Gabriela Cazares (Appr Jessica Cavazos (Appr Laura Juarez (Approvec Linda Mares (Approvec add email recipient To cancel line one because	) void <gabriela.cazares01@utrgv.edu>  ved) <gestica.cavazos@utrgv.edu>  d) <laura.juarez@utrgv.edu>  d) <laura.juarez@utrgv.edu> </laura.juarez@utrgv.edu></laura.juarez@utrgv.edu></gestica.cavazos@utrgv.edu></gabriela.cazares01@utrgv.edu>	
969 characters remaining		
- Attach file to this change requ	est (optional):	
Attachment Type	File 🗸	
File Name		
File	Choose File No file chosen	
-	Create Change Request Close	

5. Scroll down to the lines section. Select the line you want to cancel. Click on the arrow above and select on Cancel Selected Items. See sample below.

59	95 Items					2		Total (303.23 03D)
41	MPRINT INC · 595 Ite	ems · 565.25 USD				3 →	Can	subtotal
^	SUPPLIER DETAILS RIL	CHICAG-01 : 25303 NETWORK PLACE, CHICA	(GO, I <del>-</del>					Submit Req
	Contract	no value	PO Number	T000001915				Assign Dr
	Quote number	no value	PO Clauses					Related Documents
	Item		Catalog No.	Unit	Price Quant	tity Ext. Price		Purchase Order: T000001915
1	Drawstring Backpack (	Color: Black Logo : Full Color	7194		0.95 595 1/	FA 0 50.25	/	Requisitions: 2498407
	5						·	What's next for my order?
	▲ ITEM DETAILS 🍃					1		Next Step Wait for Initial PR
	Commodity Code	92111602 / Collular toloph	ana convicae	Internal Note	no valuo			Approvers There are no appro

6. Enter the note or reason to cancel the line. Click OK.

Cancel Selected Items	×
Snecify a reason for canceling the line.	
Item is no longer needed	
976 characters remaining	expand   clear
ок	Cancel

7. The  $\bigcirc$  icon is displayed on canceled lines.

4IMPRINT INC · 595 Items · 0.	00 USD					
SUPPLIER DETAILS RIL-CHICAG-0	1 : 25303 NETWORK PLACE, CHICAGO, IL 6	0673-1253 US				
Contract no va	lue	PO Number	T000001915			
Quote number no va	lue	PO Clauses				
Status Item		Catalog No.	Unit Price	Quantity	Ext. Price	
1 O Drawstring Backpack	Color: Black Logo : Full Color	7194	0.95	5951/EA	0 565.25	
ITEM DETAILS						1
Commodity Code	83111603 / Cellular telephone ser	vices	Internal Note	no value		
PO Clauses			Internal Attachments			

8. Scroll up to the top of the page and Click Submit Request. The Draft section will reflect the new subtotal.

					All 🔻		Search	(Alt+Q)	٩,	0.00 USD	e 🗢 🗠	o to
Change Requests •	3397735 •				Ξ	۲	•	0	Logout	Assign Draft	Submit Rec	quest
Summary PO Preview	External Communication Comments 1	Attachments History										
												_
<ol> <li>Changes will not be sen</li> </ol>	it to the Supplier.									Draft		
							Total	(500.00	USD)			~
Change Request Reaso	n				<i>*</i> ~		Subto	tal			50	00.00
Reason	Test - To cancel one line										50	00.00
General	ø ····	Shipping	ø · · ·	Billing	ø v		Relat	ed Docu	iments			~
Cart Name	2021-11-02 Jaggaer 21.3 Jaggaer	Ship To		Bill To			Purch	ase Ord	er: T00000211	9		2
	Upgrade - CR(1)	Attn: Mrs. Esmeralda G Rios		Accounts Payable - Office of Finance and Public Policy			Requi	sitions: a	3380742			
Description	no value	Department Procurement Office		1201 W. University Drive			What	s next f	or my order?			~

9. 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		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							

10. This is the workflow. The Cost Center/Project manager's approval is required for this type of change orders. If the PO is higher than \$15K, it will route to Procurement for buyer's approval. The system will update the PO with the requested changes when the workflow approval is completed.

	All 🔻	Search (Alt+Q)	15.00 USD 崔	♡ №
			= • •	Logout
		Related Documents		~
		Purchase Order: T0000021 Requisitions: 3385742	19	•
	`	What's next?		~
		Workflow		C 🖶
 Billing	🗸	Submitted 11/2/2021 2:26 Pl	II Bios	
Bill To Accounts Payable - Office of Finance and Public Policy 1201 W. University Drive Edinburg, TX 78539 United States		Start - Parallel Ster	os Validation	
Billing Options Accounting Date 11/2/2021		Wait for In Approved Mrs. Esmera	itial PR Validation	
Future Fiscal Year Budget no value		End - Parallel Step	s	
		Cost Center Re Approved Mrs. Esmeralda G	<b>view</b> Rios	
		Start - Parallel Ste	95	
		- Completed	alidation 2	

11. 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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