

Change Order Request Instructions

Change Order Guidelines

- The Change Order Request form is a requirement of Procurement to revise a UOM Purchase Order that has been issued through Tigerbuy.
- The Change Order Request form is the communication, approval, and documentation of a revision or change required for a Purchase Order.
- Only one Purchase Order number is allowed in a Change Order Request Requisition.
- Requisitions containing a Change Order Request form cannot contain other forms or lines of purchase.

Change Order Request Form is located under Tigerbuy Specialty Forms on the Tigerbuy Home Shopping Page, shown below.

- The Change Order Request form does not perform a Purchase Order change.
- The form processes to Procurement in a Requisition.
- Procurement applies the change requested to the Purchase Order.

The screenshot shows the Tigerbuy website interface. On the left is a navigation sidebar with icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administrator, and Setup. The main content area features a search bar at the top with a search icon and a magnifying glass. Below the search bar is a navigation menu with links for 'Non-Catalog Item', 'Favorites', 'Forms', 'Shop', 'Quick Order', 'Suppliers', 'Categories', 'Contracts', and 'Chemicals'. The main content area is divided into several sections: 'Welcome to Tigerbuy...', 'VENDOR INFORMATION', 'PUNCHOUT VENDOR INFORMATION', and 'TIGERBUY PAYMENT INFORMATION'. A red arrow points to the 'Change Order Request' link under the 'Tigerbuy Specialty Forms' section. The 'Tigerbuy Specialty Forms' section also includes links for 'Moving Services' and 'Vendor Payment'. Below this is the 'Hosted Catalog Suppliers' section, which includes a 'Punch-out' section with a grid of supplier logos and details, including Airgas, BERT, Apple, BH, CDWG, DELL, #FERGUSON, Fisher Scientific Part of Thermo F..., HP, #Insight, IDT, ThermoFisher Scientific, MSC, STAPLES, VWR, and GRAINGER.

Change Order Form Process

The Change Order Request form goes through the same workflow process in Tigerbuy as a purchase which requires an Organization Requester and Approver, as follows:

- **Requester** starts process by filling out form.
- **Requester** adds form to a Tigerbuy Shopping Cart and the Product Description area will house the form with description shown.
 - In the shopping cart cost area, there should be no cost shown for a purchase order when cost is reduced on a P0.
 - There should be cost shown when a purchase order is being increased. This cost showing is the **additional** cost only that is added to a Purchase Order. The additional cost needs budget checking to ensure funds are available for the addition.
- **Requester** continues the process to the Requisition.
 - The **Account Codes** in a Change Order Request requisition must be the same as the Purchase Order to be revised.
 - **Attachments** can be added if needed for the purchase order revision. Procurement will add the attachments to the purchase order if needed with the revision.
- **Requester** places the Requisition containing the Change Order Request form.
- Requisition process **checks budget for available funding**.
- Organization **Approver** approves the requisition.
- Change Order Request Requisition processes to **Procurement**.
- **Procurement** opens requisition to review Change Order Request form for purchase order number and change requested.
- **Procurement** opens purchase order and applies change requested. All purchase order changes are applied in both Tigerbuy and Banner.
- **Procurement** Approves the Change Order Request requisition.
- **Process is complete**.

Using the Change Order Request Form

- Click Change Order Request icon to open form.
- For new Users to Tigerbuy, read the instructions printed in the form, shown below.

Use this form if you want to modify an existing Purchase Order (i.e., increase/decrease funds, cancel a PO, renew/extend an existing agreement, etc.) Attach supporting documentation, if necessary. Reference the Purchase Order Number on all documents related/attached to this Change Order Request.

All attachments and notes can be added in cart review.

- The Change Order Request form has 3 sections:
 - Action Bar
 - Supplier Info
 - General Info

Change Order Request Available Actions:

Supplier Info ?

Enter Supplier

or
[Supplier Search](#)

General Info ?

Non-Configurable Fields

General Info Instructions

Use this form if you want to modify an existing Purchase Order (i.e increase/decrease funds, cancel a PO, renew/extend an existing agreement, etc.) Attach supporting documentation, if necessary. Reference the Requisition Number on all documents related/attached to this Change Order Request.

All attachments and notes can be added in cart review.

Form Type Change Order Request

Catalog No.

Product Description

254 characters remaining [expand](#) | [clear](#)

Quantity

Packaging (UOM) EA - Each

Estimated Price

Configurable Fields

Manufacturer Name

Manufacturer Part No

Purchase Order #

Total 0.00
[See configuration for this form](#)

1-Supplier Info

Enter Supplier-Enter Vendor from the Purchase Order to be revised. Vendor Information will populate this field.

2-General Info

Below is the list of boxes/fields designating required information:

Catalog No. No Entry Required

Product Description

Describe the change required. The change can be decreasing cost or increasing cost on a P0.

- Decreasing cost means reducing the cost on an Open P0 by closing a P0 balance, canceling an entire P0, cancelling a line on a P0, reducing unit cost or quantity on a line or lines. These are examples of a cost decrease description. Always specify the Line number that will require a revision. (For example, cancel line 2 not available, cancel entire P0 backorder too far out, close balance left on P0 due to discounts.)

- Increasing cost means adding more cost to a Purchase Order. When more cost is added to a P0, funds must be available in the budget for the additional cost. Increasing cost can be adding a new line or lines of purchase, increasing quantity or cost on an existing line. (For example, Line 3 increase quantity from 2 to 5, Line 1 increase unit cost from \$8.99 to \$10.99, add contract end date of 12/30/21 to description, add new line for Blue face masks, Item # 456789-300 units at \$3.50 each.)

Quantity

- For P0 decreases-No entry required.
- For P0 increases- Units for the additional unit cost need to be entered.

Packaging

- First box – No entry required
- Second box - Defaults to Each (EA). Packaging can be revised by clicking on arrow to view Unit of Measure list if needed with revision.

Estimated Price

- For P0 Decreases-No Entry Required.
- For P0 Increases -Unit cost for addition to P0 (This can be the new cost for a new line added, or it can be the difference between original cost and new cost if a line is increasing).

Manufacturer Name No Entry Required

Manufacturer Part No. No Entry Required

Purchase Order # P0 Number required for purchase order being revised.

Example of form filled out to revise a line.

Change Order Request	
Supplier Info	
Supplier	Alpha Building Corp more info... select different supplier
Fulfillment Address	PO Purchase/Change Orders 5: (preferred) Shawn M Babb Sr 24870 Blanco Rd San Antonio, TX 78260-6674 US select different fulfillment center
Supplier Phone	+1 210-491-9925
Distribution	
The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information. <input type="checkbox"/>	
Fax	+1 210-491-9932
Manual	
General Info	
Non-Configurable Fields	
General Info Instructions	Use this form if you want to modify an existing Purchase Order (i.e. increase/decrease funds, can documentation, if necessary. Reference the Requisition Number on all documents related/attach All attachments and notes can be added in cart review.
Form Type	Change Order Request
Catalog No.	N/A
Product Description	Line 3 increase cost from \$100 to \$125 <small>215 characters remaining expand clear</small>
Quantity	1
Packaging (UOM)	EA - Each
Estimated Price	25.00
Configurable Fields	
Manufacturer Name	
Manufacturer Part No	
Purchase Order #	P0: 23466

Example of form filled out to close a P0.

Change Order Request

Supplier Info	
Supplier	Townsend Door & Hardware see more info... select different supplier
Fulfillment Address	PO Purchase/Change Orders 2: (preferred) 148 N Conalco Dr Jackson, TN 38301-3658 US select different fulfillment center
Supplier Phone	+1 731-935-8625
Distribution	
The system will distribute purchase orders using the method(s) indicated below. Check this box to customize order distribution information. <input type="checkbox"/>	
Fax	+1 731-935-8633

General Info	
Non-Configurable Fields	
GeneralInstructions	Use this form if you want to modify an existing Purchase Order (i.e increase/decrease documentation, if necessary. Reference the Requisition Number on all documents related to this Change Order Request. All attachments and notes can be added in cart review.
Form Type	Change Order Request
Catalog No.	<input type="text"/>
Product Description	Close balance of P0321911. All invoices received and paid. 196 characters remaining expand clear
Quantity	<input type="text"/>
Packaging (UOM)	<input type="text"/> EA - Each <input type="text"/>
Estimated Price	<input type="text"/>
Configurable Fields	
Manufacturer Name	<input type="text"/>
Manufacturer Part No	<input type="text"/>
Purchase Order Number	P0321911 <input type="text"/>

3-Action Bar-Top Right of Form

After the form has been completed, the Requester has options in the **Available Actions** list.

Change Order Request

Available Actions:

Supplier Info	
Enter Supplier	<input type="text"/> or Supplier Search

General Info	
Non-Configurable Fields	
GeneralInstructions	Use this form if you want to modify an existing agreement, etc. Attach supporting documentation, if necessary. Reference the Requisition Number on all documents related/attached to this Change Order Request.

Available Actions List:

- Add and go to Cart
- Add and go to Cart
- Add to Cart and Return
- Add to Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Add to Favorites
- Save
- Add to new Cart

Add and go to Cart-The Change Order Request form goes directly into a Tigerbuy Shopping Cart. Requester can continue with the Tigerbuy process as described above.

Add to Cart and Return-The Change Order Request form goes into the shopping cart and a new Change Order Request form is ready for another change request for the same P0. When multiple lines of a P0 have changes, each change can be issued on a separate form. Each form will become a separate line in the shopping cart to process through Tigerbuy.

- This is not required to use separate forms. If the information for several lines can be communicated and understood in the Product Description box, Procurement will apply all changes from the information in one form.

- If a Change Order Request is not clear, Procurement will contact the Requester for clarification.

Click **Go** after selection has been made.

Example of a revision in the Tigerbuy Shopping Cart.

The screenshot shows a shopping cart interface with the following details:

- Cart Name:** 2021-05-18 kreece 02
- Description:** (empty field)
- Priority:** Normal
- Supplier:** A Parker & Sons Plumbing LLC - 1 Item - 50.00 USD
- Item:** Additional work, Unit Price: 50.00, Quantity: Qty: 1 EA, Ext. Price: 50.00
- Details Panel:** For Kerri Reece, Estimate (50.00 USD), Subtotal: 50.00, Shipping: 0.00, Handling: 0.00, Total: 50.00 USD. A blue button labeled "Proceed To Checkout" is visible.

A red arrow points from the "Proceed To Checkout" button to a text box on the right.

When you are satisfied with the Cart, click **Proceed to Checkout** to go to the Draft Requisition