



Adding Funds to a Subcontract PO

1. From the search bar on the top of the Marketplace screen, search for the PO Number needing a change request. Marketplace search will allow you to search using a portion of the PO number. You can also search by supplier name, requisition number, and PO owner. As you can see in the example, the system provides multiple options to search.
2. Click the link to the PO Number when it is displayed.

1. Search PO #

2. Click on PO

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Orders Search

Search All Orders

Quick Filters My Searches

Supplier City Leadership 8

Order Owners Requestor, NT 8

Approved By one, Buyer 5 Approver, Dept 4 Coordinator, Contract 1

Type of Order: All Created Date: All city leadership

1-8 of 8 Results

| | Order Identifier | Type | Order Status | Order Owners | Created Date/Time | Completed Date | Supplier | Total Amount |
|--------------------------|------------------|----------------|--------------|--------------|-----------------------|-----------------------|-----------------|---------------|
| <input type="checkbox"/> | 3754865 | Change Request | Complete | NT Requestor | 4/18/2023 2:33:53 PM | 4/18/2023 4:09:34 PM | City Leadership | 16,000.00 USD |
| <input type="checkbox"/> | NT00000616 | Purchase Order | Complete | NT Requestor | 4/18/2023 2:29:19 PM | 4/18/2023 4:10:06 PM | City Leadership | 16,000.00 USD |
| <input type="checkbox"/> | 3754865 | Requisition | Complete | NT Requestor | 4/18/2023 2:20:45 PM | 4/18/2023 2:29:19 PM | City Leadership | 15,000.00 USD |
| <input type="checkbox"/> | NT00000458 | Purchase Order | Complete | NT Requestor | 2/14/2023 10:01:06 AM | 2/14/2023 10:01:36 AM | City Leadership | 6,300.00 USD |
| <input type="checkbox"/> | NT00000206 | Purchase Order | Complete | NT Requestor | 1/24/2023 12:32:50 PM | 1/24/2023 12:34:07 PM | City Leadership | 6,264.00 USD |



3. From the Purchase Order, click on the three dots in the top right of the screen and click the link to 'Create Change Request'.

3. Click 3 dots & pick create.

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Purchase Order • City Leadership • NT00000616 Revision 1

Status Summary Revisions 2 Confirmations Shipments Change Requests 1 Receipts Invoices Comments 1

| General Information | Shipping Information | Billing/Payment |
|---|---|--|
| PO Business Unit University of North Texas (NT752) | Ship To Deliver to: NT Requestor Bldg/Rm: 213 UNT System Business Service Center Denton, TX 76205 United States | Bill To Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States |
| PO/Reference No. NT00000616 | ShipTo Address Code BSCS | BillTo Address Code Billing |
| Revision No. 1 | Delivery Options | Billing Options |
| Priority Normal | Delivery Location 0212 101 WEST SILO | Payment Terms Net 30 (0% 0, Net 30) |
| Supplier Name City Leadership | | |
| Address Attn: Serve 901/Jeff Riddle 1350 Concourse Ave Ste 463 Memphis, Tennessee 38104 United States | | |

Purchase Order NT00000616 Revision 1

- Add Comment
- Create Change Request
- Add Notes to History
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version



Optional for this form:

- You can send an email notification by clicking the checkbox for the recipient(s) you wish to include.
- You can also specify the user(s) with change request permission.
- You can **upload files as attachments**.

Create Change Request [X]

Buyer one (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>

Dept Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>

NT Requestor (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>

User with change request permission:

Amy Melvin (Approved) <Amy.Elliott@untsystem.edu>

Carl Miron ADMIN (Approved) <carl.miron@untsystem.edu>

Roohia Shahzad (Approved) <RoohiaShahzad@my.unt.edu>

UNTS Report User (Approved) <James.Armand@untsystem.edu>

sms0549 (Approved) <▲ Email Missing>

[add email recipient...](#)

Change Request Reason

Adding additional attendee

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

Attach file to this change request (optional):

Attachment Type

File

Link/URL

File Name

File

Required for this form:

4. From the Create Change Request window, enter a Change Request Reason (for instance: Adding next period funds.)

5. Click the 'Create Change Request' button.

4. Scroll down to find the change request reason box if you don't see it. Add reason.

5. Click create



The Change Request is created and ready for additional updates by you.

Required: 6. Scroll down the page to find the service form items to make changes.



7. To add funds, follow these steps:

- click the blue service description under "Supplier Details" and under the "Item" section to edit the corresponding line item on your form.
- If the new total obligated amount is **less than \$25k**, it will be added to **Item 1**, Comm Code 999-01, GL 51611.
- If the new total obligated amount is **greater than \$25k**, it will be added to **Item 2**, Comm Code 999-06, GL 51613.
- If the obligated amount exceeds \$25k but **Item 2 (Subawards > \$25K)** is not already listed in your PO, it will need to be added. Contact Jill Roys from Procurement to request the addition of this item. Once she adds the item, you can proceed with adding the funds.

8. Click the Next button to advance through the form to the section you need to change.

16 Items

City Leadership · 16 Items · 16,000.00 USD

SUPPLIER DETAILS 000-Memphis : Attn: Serve 901/Jeff Riddle, 1350...
Contract no value Quote number no value

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|---|-------------|----------------|------------|----------|------------|
| BAs - Iip - Svc Form req to change request test | | | | | |

Contract: no value

7. Click the blue service description under supplier details and under item to edit the form.

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Shop Shopping View Forms

Back to Change Request

BAs - Iip - Svc Form req to ... Instructions Request Actions

Form Number 778852
Purpose Procurement Request
Status On Document

Instructions

Details ✓
Suppliers ✓
Form Fields ✓
Review and Submit

8. Click next

Next >

pg5



UNI SYSTEM MARKETPLACE

Shop > Shopping > View Forms

[Back to Change Request](#)

BAAs - Iip - Svc Form req to ... Request Actions | History | ?

Form Number: 778852
Purpose: Procurement Request
Status: On Document

Instructions

Details

Suppliers

Form Fields

Review and Submit

Form Fields - Service Form Information

On This Page ★ Response Is Required

- Service Description (3)
- Pricing (1)

Instructions
Please complete this form

Service Description
Please complete all the required fields marked with a star.

Service Short Description *

Leadership Conference

Service Description *

Leadership Conference

1979 characters remaining

Will this service be performed on campus? *

Yes No

Pricing

Service Total Amount

| | | | | | | |
|------------|----------|-----|----------|----|-------|---------------|
| Unit Price | 1,000.00 | USD | Quantity | 18 | Total | 16,000.00 USD |
|------------|----------|-----|----------|----|-------|---------------|

Service Start Date * 05/02/2023
mm/dd/yyyy

Service End Date * 05/05/2023
mm/dd/yyyy

Commodity Code 924-78 - Lecturer or Guest Speaker

9. Update service dates & total.

9. Update the service dates to match the amendment start and end date. And, add the current increment amount to the existing Item 2 amount.

Example: Previous PO Item 2 amount was \$50k. New increment adds \$7k. Update service amount on Item 2 to \$57k.

10. When your changes are complete, click the **Save** on Change Request button. Then click the **Next** button.

10. Save



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SHOPPING ENVIRONMENT

Shop > Shopping > View Forms

[Back to Change Request](#)

BAs - Iip - Svc Form req to ...

Form Number: 778852
Purpose: Procurement Request
Status: On Document

Instructions

- Details ✓
- Suppliers ✓
- Form Fields ✓

Review and Submit

Request Actions | History ?

✓ Required Fields Complete

| Section | Progress |
|-------------|----------------------------|
| Details | ✓ Required Fields Complete |
| Suppliers | ✓ Required Fields Complete |
| Form Fields | ✓ Required Fields Complete |

Previous **Back to Change Request**

11. Click Back to Change Request

12. Attach documentation.

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SHOPPING ENVIRONMENT

Change Requests • 3755120

Summary Taxes/S&H PO Preview External Communication Comments 1 **Attachments** History

Assign Draft **Submit Request**

12. Attach the amendment documentation to the change order if you have not already done so.



13. After you review your changes, click the Submit Request button in the top right section of the change request. A confirmation will display to confirm the request is successfully submitted.

13. Submit

The screenshot shows the 'Change Requests' page for request 3755120. The 'Submit Request' button is highlighted in yellow. A green banner at the bottom right displays the message 'Change Request 3755120 Submitted'. The page includes a navigation bar with 'Summary', 'Taxes/S&H', 'PO Preview', 'External Communication', 'Comments 1', 'Attachments', and 'History'. A 'Draft' status bar is visible above the main content area. The main content area includes a 'Change Request Reason' section with the reason 'Adding additional attendee' and a 'General' section with details for the cart name, description, and business.

| Summary | Options |
|-----------------------|---------------|
| Change Request number | 3755120 |
| Change Request status | Pending |
| Change Request date | 4/19/2023 |
| Change Request total | 18,000.00 USD |
| Number of line items | 1 |