



Drexel University

Smart Source

Accounts Payable &
Procurement Services

How to Create PO Change Order Request in Smart Source

Revised April 2024

PO Change Request Criteria

1. Change Request can only be created by the owner of the purchase order.
2. Change Request will now be initiated through the PO instead of a PO Change Order Request form, which will no longer be available.
3. The PO must be still be open for a change request to be successfully processed. The status of a PO can be checked in Smart Source.
4. The Change Request can only be used for following transactions:
 - To increase or decrease the quantity.
 - To increase or decrease the price of an order.
 - To liquidate the remaining balance of the purchase order.
5. The Change Request form **cannot** be used on Catalog or Punchout Orders.
6. The following forms can be used in conjunction with the Change Request form:
 - Non-Catalog Form
 - Sole Source Award Form
 - Subaward
 - Multi-Year Form

Step 1 : Locate your PO. You can use the search fields located at the upper right-hand side of the Smart Source screen

The screenshot shows the Smart Source Shopping Dashboard interface. At the top right, there is a search bar labeled "Search (Alt+Q)" which is highlighted with a red box and a blue arrow pointing to it. Below the search bar, the breadcrumb navigation reads "Shop > Shopping > Shopping Home > Shopping Dashboard". The main content area is titled "Shopping Dashboard" and includes several informational cards: "Updated SAP Form", "Off-Campus Delivery Information", "Multi-Address Amazon Orders", and "Contract Templates". On the left side, there is a vertical navigation menu with icons for Home, Shopping Cart, SAP (highlighted with a yellow box and a blue arrow), and other functions. At the top right of the dashboard, there are utility icons for currency (0.00 USD), a shopping cart, a heart icon, and notification counts (208 and 92). A "Logout" button is located in the top right corner.

Shop > Shopping > Shopping Home > Shopping Dashboard

All ▾ Search (Alt+Q) 0.00 USD 208 92 Logout

Shopping Dashboard

Dashboard Actions ▾ View Another Dashboard ▾

Updated SAP Form

As of Wednesday, March 17th, the Smart Source Speaker, Artist, and Performer form has been updated including the addition of a new workflow for events involving minors on campus. Please refer to our updated SAP job aid located on our site: [Smart Source Training Guides](#).

Off-Campus Delivery Information

If you require off-campus delivery of **business-critical goods**, prior to submitting your Smart Source cart, email Sourcing@drexel.edu and provide the following:

- Smart Source cart number
- Off-Campus shipping address
- and the business case for the order.

Your order will be reviewed and once approved; you will be informed when the address has been added to the system.

The address will be inactivated once normal operations resume.

Multi-Address Amazon Orders

If you need to purchase items from Amazon that ship to a large number of off-campus addresses during modified operations due to COVID-19, Procurement has the ability to grant access for you to directly set up and place orders for off-campus shipments with your P-Card.

If you have a need to place such orders, please contact Dave Collins at dcc328@drexel.edu and provide an overview of the products to be purchased, the business need, and the intended recipients.

If you require off-campus delivery of **business-critical goods**, please refer to the instructions provided in the Off-Campus Delivery section.

Contract Templates ?

[Contract Templates](#)

Action Items ?

My Assigned Approvals

- 26 Requisitions To Approve
- 7 Supplier Registrations

Unassigned Approvals

- Requisitions

PO Change Request – Decrease or Increase Quantity

Purchase Order • [CoCo Gauff Tennis Academy](#) • U0294706 Revision 0

Status Summary Revisions **1** Confirmations Shipments

Step 2: Select **“Create Change Request”** from your Purchase Order from the options dropdown menu on the upper right – hand side of the page.

0.00 USD 298 5

1 of 115 Results

- Add Comment
- Create Change Request**
- Add Notes to History
- Cancel PO
- Finalize Revision
- Create Receipt
- Create Credit Memo
- Create Invoice
- Print Fax Version
- Send Test PO

General Information

PO/Reference No. **U0294706**

Revision No. 0

Supplier Name [CoCo Gauff Tennis Academy](#)

Address 10 N Ocean Blvd
Events Office
Delray Beach, Florida 33483 United States

Phone +1 561-274-3200

Purchase Order Date 11/20/2023

Total 3,250.00

Requisition Number [3907496](#) [view](#) | [print](#)

3-Way Match ✗

Pcard Transaction - Do Not Pay ✗

Bank Code *no value*

Shipping Information

Ship To

Attn: Wendi Williams
Rm/MS: 3420 Powelton Ave 2nd fl
CENTRAL RECEIVING
34TH & LUDLOW STREETS
PHILADELPHIA, PA 19104
United States

ShipTo Address Code CENREC

End User Information

Owner Name Wendi Williams

Owner Phone +1 215-895-2000

Owner Email wbw29@drexel.edu

Billing/Payment

Bill To

PROCUREMENT SVCS A/P
Drexel_University@edmamericas.com
US MAIL:
PO BOX 42485
PHILADELPHIA, PA 19104
United States

BillTo Address Code AP

Billing Options

Accounting Date *no value*

Payment Terms 0, Net 45

F.O.B. Destination

Enclosure Code *no value*

Grouping Indicator *no value*

Distribution Indicator *no value*

Tax Group Code *no value*

Internal Information

Internal Attachments

Date	Add
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PO Change Request – Decrease or Increase Quantities or Prices

Create Change Request

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](#)

- Jennifer Fuller (Approved Requisition) <jm4537@drexel.edu>
- Wendi Williams (Prepared by, Prepared for) <wbw29@drexel.edu>

User with change request permission:

- Dave Collins (Approved) <dcc328@drexel.edu>
- Elizabeth Goralczyk (Approved) <emg334@drexel.edu>
- Jennifer Fuller (Approved) <jm4537@drexel.edu>
- Siobhan McGovern (Approved) <scm347@drexel.edu>
- Stephanie Garcia (Approved) <smg429@drexel.edu>

[add email recipient...](#)

Change Request Reason

Need to decrease to the quantity of the order.

[Create Change Request](#) [Close](#)

Step 3: Determine who will be notified that change order request is being done and add a reason on why the Change Order is needed. (i.e. There was a decrease or increase to the quantities or prices of items originally ordered.)

Create Change Request

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](#)

- Jennifer Fuller (Approved Requisition) <jm4537@drexel.edu>
- Wendi Williams (Prepared by, Prepared for) <wbw29@drexel.edu>

User with change request permission:

- Dave Collins (Approved) <dcc328@drexel.edu>
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- Jennifer Fuller (Approved) <jm4537@drexel.edu>
- Siobhan McGovern (Approved) <scm347@drexel.edu>
- Stephanie Garcia (Approved) <smg429@drexel.edu>

[add email recipient...](#)

Change Request Reason

Need to increase price of service.

[Create Change Request](#) [Close](#)

PO Change Request – Decrease or Increase Quantities or Prices

Change Requests • 3907612



Assign Draft

Submit Request

Summary PO Preview

This is the Draft of the Change Order Request. It provides a Change Order # and states the reason for the change in quantity.

Changes will be sent to the Supplier.

Change Request Reason

Reason Need to add more quantities to the order.

Summary

Draft

Total (3,250.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for

1 Item

CoCo Gauff Tennis Academy • 1 Item • 3,250.00 USD

SUPPLIER DETAILS

PO Number U0294706 Quote number no value
Contract no value PO Clauses

Item

[Non-Catalog Purchasing Request](#)

Contract: no value

Click this link to take you to your cart where you can adjust the quantities of your order.

Quantity Ext. Price

Item	Quantity	Ext. Price
1 tennis training package for 5 students	1	3,250.00

ITEM DETAILS

Commodity Code 49000000 Internal Note no value
Classification no value Internal Attachments Add
External Note no value
Attachments for supplier Add

PO Change Request – Decrease or Increase Quantities or Prices

Step 4: Update quantity to required amount. Once updated click **“Save”**

The screenshot shows a web application interface for a PO Change Request. At the top, there is a navigation bar with a search bar, currency (3,500.00 USD), and notification icons. Below the navigation bar, the page title is "Form • Non-Catalog Item Form". On the right side of the form header, there are icons for heart, print, help, and a "Close" button. A red box highlights a "Save" button with a dropdown arrow.

The main content area is divided into two columns: "Supplier Information" and "Product/Service Description".

Supplier Information:

- Existing Supplier: Enter Manually
- Supplier: A search box contains "CoCo Gauff Tennis Academy". Below it, a list of suggestions includes "Parallel Design Inc".
- Fulfillment Address: "PO Purchasing 1", "5543 Webster St", "Philadelphia, Pennsylvania 19143 United States".
- Supplier Phone: "+1 215-476-4040".

Product/Service Description:

- Catalog No.: An empty text box.
- Table with columns: Desc. ★, Unit Price ★, Quantity ★.
- Row 1: Desc. "equipment", Unit Price "3,500.00", Quantity "2".
- Text below table: "245 characters remaining expand | clear".
- Summary bar: "PRODUCT/SERVICE DESCRIPTION TOTAL 7,000.00".

PO Change Request – Decrease or Increase Quantities or Prices

Step 5: You will be returned to the Draft page of your Change Order Request. You will be able see all the updates you have made to the order. Add or/Change the **Accounting Date** located under **Billing Options** to the current date.

The screenshot displays a web application interface for a PO Change Request. The main content area is titled 'Change Requests • 3988490' and has tabs for 'Summary', 'PO Preview', 'External Communication' (selected), 'Comments 1', 'Attachments 3', and 'History'. A notification states 'Changes will be sent to the Supplier.' Below this is the 'Change Request Reason' section with the reason 'Update quantity of equipment packages'. The main details are organized into three columns: 'General', 'Shipping', and 'Billing'. The 'Billing' column contains a 'Billing Options' section, which is highlighted with a red box and shows 'Accounting Date' set to '03/21/2024'. A right-hand sidebar provides a 'Summary' (Draft), 'Total (7,000.00 USD)', 'Related Documents' (Purchase Order: U0305877, Requisition: 3988415), 'What's next for my order?' (Next Step: Purchasing Review, Approvers: Arias, Michele; Collins, Dave; Fuller, Jennifer; Maertzig, Kathleen; Williams, Wendi), and 'Workflow' (Draft Active, Michele Arias).

General	Shipping	Billing
Cart Name: 2024-03-21 ma484 02 - CR	Ship To: Attn: Wendi Williams, Rm/MS: 3420 Powelton Ave 2nd fl, CENTRAL RECEIVING, 34TH & LUDLOW STREETS, PHILADELPHIA, PA 19104, United States	Bill To: PROCUREMENT SVCS A/P, Drexel_University@edmamericas.com, US MAIL: PO BOX 42485, PHILADELPHIA, PA 19104, United States
Description: no value	Delivery Options: Expedite (X)	No credit card has been assigned.
Prepared by: Michele Arias	Ship Via: Best Carrier-Best Way	Billing Options
Prepared for: Wendi Williams	Requested: no value	Accounting Date: 03/21/2024
3-Way Match: (X)		Enclosure Code: no value
Validate FOMPROF Access: (X)		
Pcard: (X)		

PO Change Request – Decrease or Increase Quantities or Prices

Step 6: Review all your changes and if accurate, click “Submit Request”

The screenshot displays a web interface for a PO Change Request. At the top, the title is "Change Requests • 3988490". A navigation bar includes "Assign Draft" and a highlighted "Submit Request" button. Below this, tabs for "Summary", "PO Preview", "External Communication", "Comments", "Attachments", and "History" are visible. A message states "Changes will be sent to the Supplier." The "Change Request Reason" section shows "Update quantity of equipment packages". The main content is divided into three columns: "General", "Shipping", and "Billing". The "General" column includes fields for Cart Name, Description, Prepared by, Prepared for, 3-Way Match, Validate FOMPROF Access, and Pcard. The "Shipping" column includes Ship To, Delivery Options, and Ship Via. The "Billing" column includes Bill To, Billing Options, and Enclosure Code. A right-hand sidebar contains a "Summary" section with a "Draft" status and a "Total (7,000.00 USD)", "Related Documents" (Purchase Order and Requisition), "What's next for my order?" (Next Step: Purchasing Review, Approvers: Michele Arias, Dave Collins, Jennifer Fuller, Kathleen Maertzig, Wendi Williams), and a "Workflow" section with a "Show skipped steps" toggle and a "Draft" indicator.

General	Shipping	Billing
Cart Name: 2024-03-21 ma484 02 - CR	Ship To: Attn: Wendi Williams, Rm/MS: 3420 Powelton Ave 2nd fl, CENTRAL RECEIVING, 34TH & LUDLOW STREETS, PHILADELPHIA, PA 19104, United States	Bill To: PROCUREMENT SVCS A/P, Drexel_University@edmamericas.com, US MAIL: PO BOX 42485, PHILADELPHIA, PA 19104, United States
Description: no value	Delivery Options: Expedite (X)	No credit card has been assigned.
Prepared by: Michele Arias	Ship Via: Best Carrier-Best Way	Billing Options: Accounting (no value), Date
Prepared for: Wendi Williams	Requested: no value	Enclosure Code: no value
3-Way Match: (X)		
Validate FOMPROF Access: (X)		
Pcard: (X)		

PO Change Request – Decrease or Increase Quantities or Prices

You have now submitted your Change Request.

Simple Advanced

Search for products, suppliers, forms, part number, etc.

✓ Change Request 3988490 Submitted

Summary	Options
Change Request number 3988490	Print
Change Request status Pending	Recent orders
Cart name 2024-03-21 ma484 02 - CR	Return to your home page
Change Request date 3/21/2024	
Change Request total 7,000.00 USD	
Number of line items 1	