

PO Change Order/Cancel/Close Requests

To Request a Change, Cancel or Close:

- In SpartanMart, click on the PO number to open the PO.
- Click on the Comments tab of the PO
- Create a comment by clicking the “+”
- Add the Purchasing Agents (Anthony Kilar, Jim Riedel) as recipients to receive emails on your comment

Purchase Order ▾ : P0058747 Revision 0 (Closed)

Status Summary Revisions **1** Confirmations Shipments Receipts Invoices **Comments 1** Attachments History

Records found: 1 Show comments for Purcha... ▾ **+**

ADD COMMENT

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | **Add recipient**

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Attach file (optional)

Attachment Type File Link/URL

File Name

File

1000 characters remaining expand | clear

NOTE: If your comment is not emailed to an individual, it will not be seen, and the change will not be made. Email to more than one, in case someone is out of office.

- In your Comment:
 - CHANGE**
 - Explain in detail what is to be changed and which PO lines need to be changed
 - Advise if the PO needs to be resent to the supplier
 - CANCEL**
 - Indicate to cancel the entire PO or the specific PO lines that need to be cancelled.
 - Add the explanation of **why** the PO or line should be cancelled.
 - CLOSE**
 - Indicate to close the entire PO or the specific PO lines to be closed.

Which do I Request?

A **Change Order** is required to:

- add, modify or remove items/services from a PO
- change Fund/Account **BEFORE** invoice entry. After invoice entry, a journal voucher is required to move the expense to the correct fund or account

A **Cancel** is an action between UNCG and the supplier.

- The entire PO or only individual lines can be cancelled with the supplier.
- Cancellations always need to be communicated to the supplier. Unless there is a specific reason given to the contrary, requests to cancel a PO will be sent to the supplier.
- After the PO/lines is cancelled with the supplier, Purchasing will close the PO/lines in Banner to remove your encumbrance.
- DO NOT request a cancellation of a PO that is already in process/shipment with a supplier.
- PO's to punchout suppliers cannot always be cancelled because of the rapid shipping timelines. For punchout orders that are backordered or have longer lead times, contact the Purchasing Agent to discuss cancelling with the supplier.
- For punchout products that can be returned, it is usually recommended to receive the product and then process a return.

NOTE: Apple Computer does not accept returns unless the shipment is Apple's error. To cancel an Apple order, please obtain email verification from Apple Returns department that the cancellation has been processed.

A **"Close"** is the removal (liquidation) of a PO encumbrance in Banner. "Closing" is between the PO and Banner. Suppliers do not need to know that PO's are closed.

- If the PO remains open in Banner with a balance that will not be invoiced, request Purchasing to close the PO in Banner.
- PO's can be closed by Accounts Payable (AP) or by Purchasing. PO's are closed by AP if AP knows they are paying the last invoice.
- PO's closed by AP in Banner are not automatically marked "closed" in eMarketplace. If your Banner encumbrance has been removed, do not worry if eMarketplace still shows the PO being open.
- PO's and PO lines that are cancelled with a supplier will also be closed in Banner as part of the cancellation request.