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.
Step 2: Select “Create Change Request” from your Purchase Order from the options dropdown menu on the upper right – hand side of the page.
PO Change Request – Decrease or Increase Quantities or Prices

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

Click this link to take you to your cart where you can adjust the quantities of your order.
Step 4: Update quantity to required amount. Once updated click “Save”
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.
Step 6: Review all your changes and if accurate, click “Submit Request”
You have now submitted your Change Request.