

# Amend a Standard Requisition or Order in Unimarket



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## Introduction

This document describes when it is possible to amend a standard requisition or purchase order and how to go about it.

This does not cover how to amend blanket requisitions and blanket orders. For more information see 'Amend a Blanket Requisition or Order in Unimarket'.

## Requisition vs Order

A requisition is what the end-user creates when they are requesting goods or services.

After the requisition has been through any required approvals, an order is created.

The order (or sometimes just the order number) is what gets sent to the supplier. When the supplier sends us an invoice they should quote the order number.

## How to Edit a Requisition or Order

At all stages of a requisition and order, to make an edit go to the 'More Actions' drop-down menu. The menu options will change depending on your level of access and the stage of the requisition or order.



## Amending an Incomplete Requisition

While the requisition is being created by the requestor it's called an **incomplete requisition**.

While it has a status of incomplete, anything can be edited by the original requestor, including the supplier if it's a non-catalogue requisition.

- To save a requisition and come back to it later, click **Save**. At this point it will be given a requisition number and a status of Incomplete.
- To find a requisition that has been saved go to the Tasks menu in the top right-hand corner > Incomplete Requisitions. To continue to edit the requisition click **Checkout**.
- To submit the requisition, click 'Reassign' and select your local Supply Chain Hub.
- Once the requisition has been reassigned to a Supply Chain Hub the supplier can no longer be changed, but all other details can.

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When the requisition is submitted for approval, approvers then get the ability to make changes to the requisition, including the supplier on a non-catalogue requisition.

## Amending a Pending Requisition

While the requisition is waiting for approvals it has a status of **pending**.

In this state, approvers can use More Actions > Edit to make the following changes:

- Update shipping address
- Add attachments
- Add special instructions
- Cancel a line item
- Edit a line item
  - For round trip and catalogue:
    - Account Code
    - Quantity
    - Tax code
    - Notes
    - Delivery date
  - For a non-catalogue item, all of the above plus:
    - Supplier
    - Item detail (name, description, code, category, manufacturer part ID, unit of measure)

Approvers **cannot add line items** during the approval process.

## Amending a standard Purchase Order

Once a requisition is fully approved an order is created.

Only the person named as the 'Buyer' can make edits.

The order can only be edited in certain situations. Those are:

- It has not been receipted (even if subsequently undone), **and**
- There are no invoices against the order, **and**
- The supplier has opted to "allow" order changes in their profile settings.


A new incomplete requisition will be created to manage the edits. As with any other Incomplete Requisition, almost everything can be changed including line item quantity and account code, with the following notes:

- If the order has non-catalogue line items these can be copied and details can be changed (**not including** the supplier)
- If the order catalogue or round-trip line items these can only be removed.

## Amend a Standard Requisition or Order in Unimarket



Once the requisition has been through any required approvals (if necessary) it will get a suffix to indicate it has been updated (e.g. /2, /3). Previous versions can no longer be used and will point to the latest version:

 **Order OU02403/1**  
University of Otago [P2P Up... > Net Xpress Procurement - NXP

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ⓘ This order has been edited and replaced by order [OU02403/2](#) and can no longer be edited, closed or received.