

Purchase Order Change Orders

The Purchase Order Change Orders program enables a MUNIS user to maintain Purchase Orders after they have been converted and posted from a Requisition or entered and posted directly through Purchase Order Entry.

Financials > Purchasing > Purchase Order Processing > Purchase Order Change Orders

- ▲ Munis
 - ▲ Financials
 - ▷ General Ledger Menu
 - ▷ Budget Processing
 - ▲ Purchasing
 - ▷ Setup
 - ▲ Purchase Order Processing
 - Item Order Form Requests
 - Requisitions
 - Requisition Entry
 - Requisition Approvals
 - Requisition Conversion
 - Requisition Import
 - Requisition Export
 - Purchase Order Entry
 - Purchase Order Approvals
 - Print Purchase Orders
 - Purchase Order Change Orders**

Purchase Order Change Orders - Munis [Racine County | TRAIN | 10/06]

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global- Duplicate Print PDF Excel Word Email Attach Notes Audit Maplink- Alerts- Line Items Close PO Notes Re-Open PO Cancel PO More...- Return

Main Terms/Miscellaneous

Purchase Order Details

Dept/Loc: [] ...

Fiscal year: [] Current Next Period: []

PO number: []

General commodity: []

General description: []

Buyer: []

Status: Original Change Order

Project accounts applied: Quantity Amount

Receive By: []

Entered: []

Needed by: []

Expire: []

Last changed: []

General Notes Receiving Invoices

Vendor Details

Vendor: [] Committed

Name: []

PO mailing: []

Delivery method: Print Fax E-Mail

Remit: []

Vendor/Sourcing Notes

Shipping Details

Ship to: []

Email: []

Reference: []

Purchase Order Header Changes

- To change any of the Header information on an existing Purchase Order, click Update . Make changes to any of the fields that appear on the **Main, Terms/Miscellaneous** or **User Defined** tabs where you are able to place your cursor. (Note: Before any changes are made, notice that the status of the Change Order is "N-None".)

Purchase Order Change Orders - Munis

Home

Accept Cancel Search Advanced Add Update Global Print PDF Text file Word Notes Audit Attachments Maplink Return

Purchase Order Change Orders - Munis [VIRTUAL SERVER 10.4EA Train]

Main Terms/Miscellaneous User Defined

Purchase Order Details

Dept/Loc: FIN FINANCE DEPARTMENT Status: Original 8 - Printed
Fiscal year: 2014 Current Next Period: 06 Buyer: tony.belsito Change Order: N - None
PO number: 11400000
General commodity: 615 OFFICE SUPPLIES, GENERAL
General description: Office Supplies Order
Entered: 12/20/2013
Needed by: 06/30/2014
Expire: 06/30/2014
Last changed: 00

Vendor Details

Vendor: 1013 Committed
Name: STAPLES
PO mailing: 0
1981 WOODBURY AVE
PORTSMOUTH NH 04105
Delivery method: Print Fax E-Mail
Remit: 1 STAPLES

Shipping Details

Ship to: FIN
2033 SUGAR GROVE AVE
FALMOUTH ME 04105
Email: tony.belsito@tylertech.com
Reference: ATTN: Tony Belsito

2. After all, if any, changes have been made to the Header information of the Purchase Order, click Accept to save the changes. (Note: The status of the Change Order is now "C-Created".)

Purchase Order Change Orders - Munis

Home

Accept Cancel Search Advanced Add Update Global Print PDF Text file Word Notes Audit Attachments Maplink Return

Purchase Order Change Orders - Munis [VIRTUAL SERVER 10.4EA Train]

Main Terms/Miscellaneous User Defined

Purchase Order Details

Dept/Loc: IT INFORMATION TECHNOLOGY Status: Original 8 - Printed
Fiscal year: 2014 Current Next Period: 06 Buyer: tony.belsito Change Order: C - Created
PO number: 11400000
General commodity: 615 OFFICE SUPPLIES, GENERAL
General description: Office Supplies Order
Entered: 12/20/2013
Needed by: 06/30/2014
Expire: 06/30/2014
Last changed: 12/20/2013 01

Vendor Details

Vendor: 1013 Committed
Name: STAPLES
PO mailing: 0
1981 WOODBURY AVE
PORTSMOUTH NH 04105
Delivery method: Print Fax E-Mail
Remit: 1 STAPLES

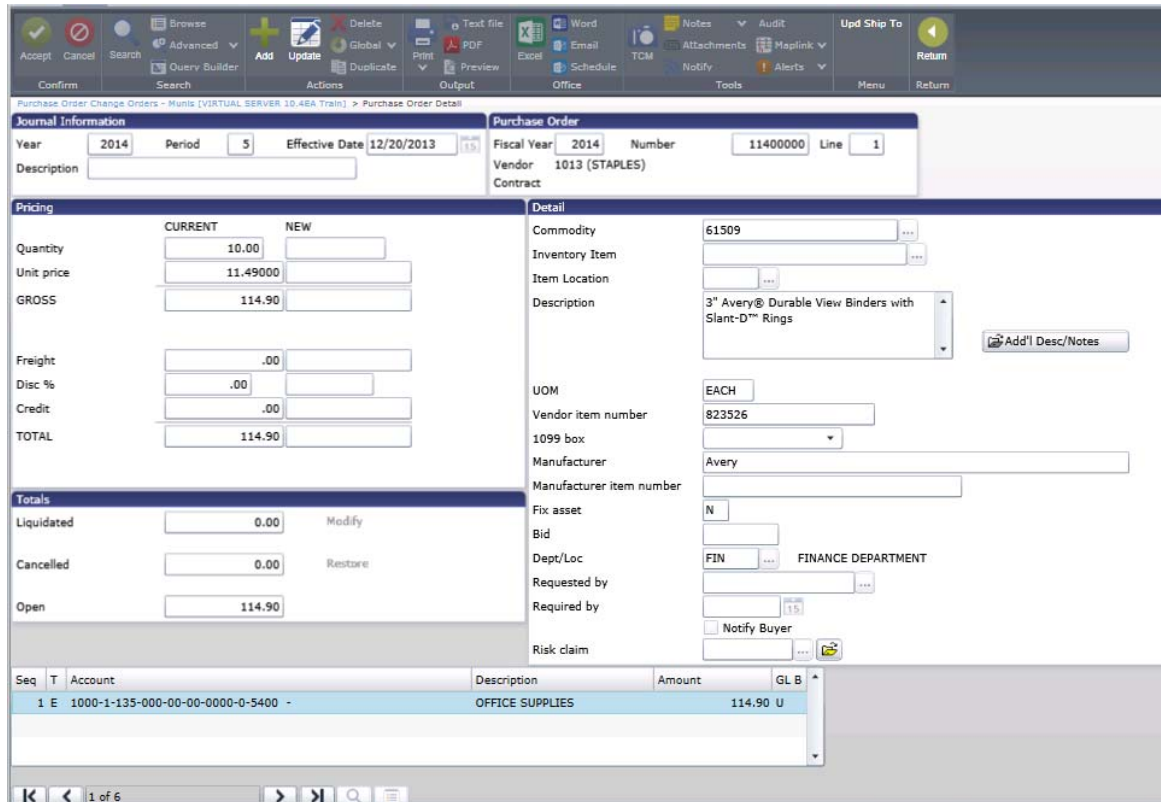
Shipping Details



Ship to: IT
5435 E WASHINGTON ST
FALMOUTH ME 04105
Email: tony.belsito@tylertech.com
Reference: ATTN: Tony Belsito

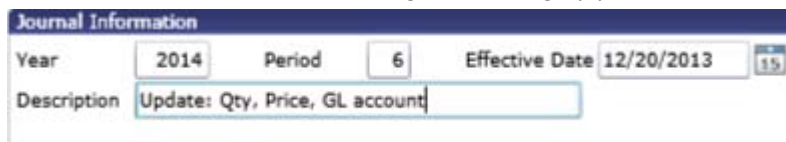
Purchase Order Change Orders

Purchase Order Detail Changes

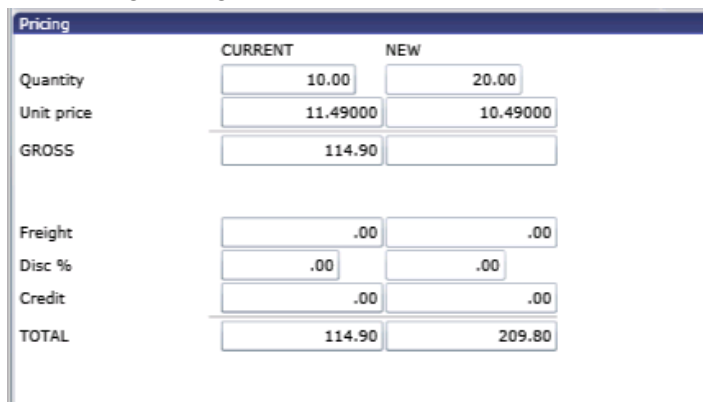
- To change the Detail of the Purchase Order, click “Line Detail” in the Menu portion of the Ribbon.



- Click Update  on the ribbon to make changes to any of the items on the Purchase Order, or if you wish to add items to the Purchase Order, click Add .
- Provide a reason for performing the change(s) that will post to the GL Journal Entry.



- Enter the new information for updated quantities, unit price, freight, discount, etc., that applies to the item being changed.



	CURRENT	NEW
Quantity	10.00	20.00
Unit price	11.49000	10.49000
GROSS	114.90	
Freight	.00	.00
Disc %	.00	.00
Credit	.00	.00
TOTAL	114.90	209.80

**Note*: Only enter the new order amounts rather than inputting negatives. The “CURRENT” column displays what is currently on order and the “NEW” column displays what the new order will be for that item after the record is approved and posted.*

Purchase Order Change Orders



- When the cursor arrives to the Account input section of the item, the Amount charged to that account will update automatically based on the new amounts specified in the Pricing section. You can leave the GL account specified per the original Purchase Order, or you can update and/or split the GL Account and charges.

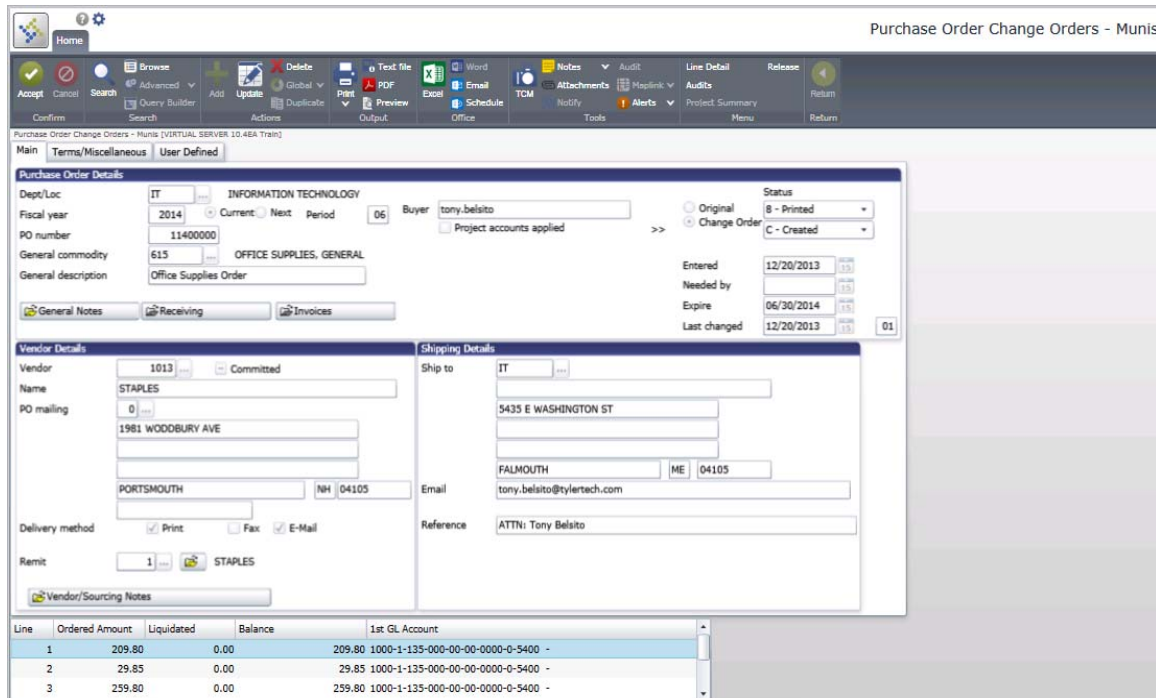
a) Account charges per original order

Seq	T	Account	Description	Amount	GL B
1	E	1000-1-135-000-00-00-0000-0-5400 -	OFFICE SUPPLIES	209.80	U

b) Add additional accounts to charge to and split cost

Seq	T	Account	Description	Amount	GL B
1	E	1000-1-135-000-00-00-0000-0-5400 -	OFFICE SUPPLIES	104.90	U
2	E	1000-1-155-000-00-00-0000-0-5400 -	OFFICE SUPPLIES	104.90	A

- Click Accept  to save changes. Then, click Return  to go back to the Header of the Purchase Order.
- When ready to accept the changes to the Purchase Order and send the changes through the Workflow approval process, click “Release” in the Menu portion of the ribbon.



Purchase Order Change Orders - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global PDF Text file Word Notes Attachments Audit Line Detail Release

Confirm Query Builder Search Actions Duplicate Post W Preview Output Office TCM Notify Alerts Project Summary Menu Return

Purchase Order Change Orders - Munis [VIRTUAL SERVER 10.46A Train]

Main Terms/Miscellaneous User Defined

Purchase Order Details

Dept/Loc: IT INFORMATION TECHNOLOGY Status: B - Printed

Fiscal year: 2014 Current Next Period: 06 Buyer: tony.belisto Change Order: C - Created

PO number: 11400000

General commodity: 615 OFFICE SUPPLIES, GENERAL

General description: Office Supplies Order

Entered: 12/20/2013

Needed by: 06/30/2014

Expire: 06/30/2014

Last changed: 12/20/2013 01

Vendor Details

Vendor: 1013 Committed

Name: STAPLES

PO mailing: 0

1981 WOODBURY AVE

PORTSMOUTH NH 04105

Delivery method: Print Fax E-Mail

Remit: 1 STAPLES

Shipping Details

Ship to: IT

5435 E WASHINGTON ST

FALMOUTH ME 04105

Email: tony.belito@tylertech.com

Reference: ATTN: Tony Belito

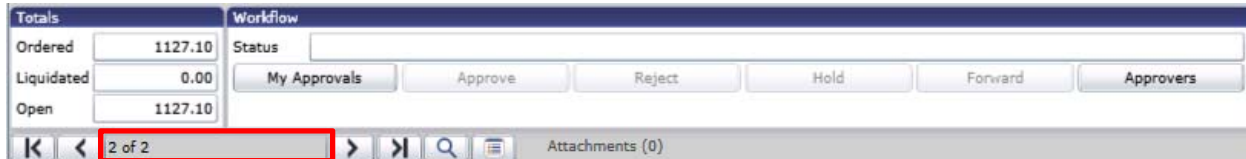
Vendor/Sourcing Notes

Line	Ordered Amount	Liquidated	Balance	1st GL Account
1	209.80	0.00	209.80	1000-1-135-000-00-00-0000-0-5400 -
2	29.85	0.00	29.85	1000-1-135-000-00-00-0000-0-5400 -
3	259.80	0.00	259.80	1000-1-135-000-00-00-0000-0-5400 -

Purchase Order Change Orders

10. At this point, you can exit out of the Purchase Order Change Orders program.

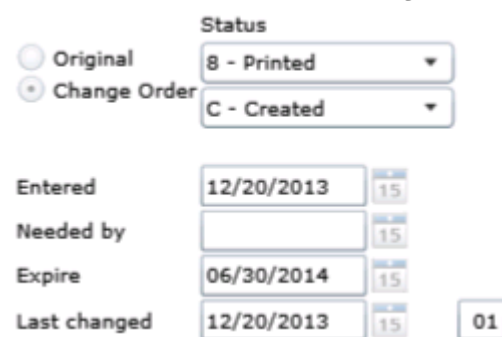
The next time that the Purchase Order is opened in this program and until the changes are “Posted”, the Originator or the Approver will notice that there is a second record for the same exact Purchase Order number. This feature allows the Approver to see what has been modified from the Original Purchase Order



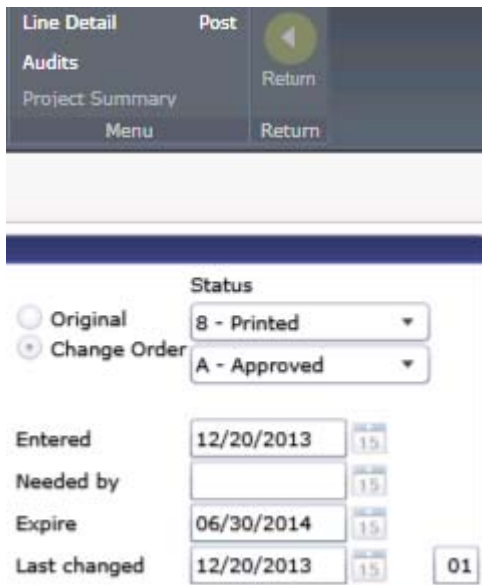
One record will be the Original PO



One record will be the Change Order



11. Once the Purchase Order Change Order has been “Approved”, it can be posted by clicking “Post” in the Menu portion of the Ribbon.



Purchase Order Change Orders

- Depending on the Purchasing module permissions and restrictions assigned to you, there are additional actions that may be performed from the Menu portion of the ribbon.

Additional Menu Actions

- Cancel PO:** Cancel an open Purchase Order and all Line Items on the Purchase Order with open amounts
- Close PO:** Close an open Purchase Order that has been fully liquidated and has no open amounts
- Re-Open PO:** Grants the ability to open a Purchase Order with a “C-Closed” status. Performing this action only changes the status of the Purchase Order to “8-Printed”. Each Line Item on the Purchase Order that you wish to “Re-Open”, must be restored within Line Detail.

Totals		
Liquidated	0.00	Modify
Cancelled	209.80	Restore
Open	0.00	

- Mass Cancel PO:** Performs a mass cancellation to all open Purchase Orders that were returned in the Find set.
- Mass Close PO:** Performs a mass closure of all open Purchase Orders that have been fully liquidated and were returned in the Find set.
- Cancel by GL:** Performs a mass cancellation by defining specific criteria as to which GL segments that you wish to cancel those open Purchase Orders containing that criterion