

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

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 Requisitions
 Requisition Entry
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Purchase Order Change Orders	- Munis [Racine County TRAIN 10/06]
Accept Cancel Search Browse Search Buguery Builder + Add Update Office Global Duplicate Print PDF Print Prin	Audit Line Items Close PO Maplink~ Notes Re-Open PO Alerts* Cancel PO 🗎 More*
Confirm Search Actions Output Office Tools Main Terms/Miscellaneous	Menu
Purchase Order Details	
Dept/Loc	Status
Fiscal year O Current O Next Period Buyer	Original
PO number Project accounts applied	O Change Order
General commodity Receive By O Quantity O Amou	unt
General description	Needed by
Cá General Notes	Expire
	Last changed
Vendor Details	Shipping Details
Vendor Committed	Ship to
Name	
PO mailing	
PO mailing	
PO mailing	Email
PO mailing	Email
PO mailing	Email Reference
PO mailing	Email Reference
PO mailing	Email Reference
PO mailing	Email Reference
PO mailing Delivery method Print Fax E-Mail Remit	Email Reference

Purchase Order Header Changes

1. 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".*)





Home C				Purchase	Order Change	Orders - Mun
Accept Cancel Search Confirm	Browse Advanced v Advanced v Guery Builder Search Advanced v Advanced v	Excel Schee	dule Notes V Audit TCM Attachments III Maplink V Notify I Alerts V Tools	Return Menu Return		
Main Terms/Miscella	ers - Munis [VIRTUAL SERVER 10.4EA Train] Ineous User Defined					
Purchase Order Detai	s					
Dept/Loc Fiscal year PO number	FINANCE DEPARTMENT 2014 © Current Next Period 06 B 11400000	uyer tony.belsit	o >> accounts applied	 Original Change Orde 	Status 8 - Printed N - None	•
General commodity General description	615 OFFICE SUPPLIES, GENERAL Office Supplies Order			Entered Needed by	12/20/2013 15 15 05/20/2014	
🚰 General Notes	Receiving			Expire Last changed	15	00
Vendor Details		Shipping Detai	ls			
Vendor	1013 Committed	Ship to	FIN			
Name	STAPLES					
PO mailing	0		2033 SUGAR GROVE AVE			
	1981 WODDBURY AVE					
			FALMOUTH	4E 04105		
	PORTSMOUTH NH 04105	Email	tony.belsito@tylertech.com			
Delivery method	✓ Print Fax ✓ E-Mail	Reference	ATTN: Tony Belsito]	
Remit	1 📰 📂 STAPLES					
😂 Vendor/Sourcin	g Notes					

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".)

Home 0				Purchase	Order Change	Orders - Munis
Accept Cancel Searc	Browse Add Update Global v Search Actions Output	le Word Excel Schee Office	ule Notes V Audit Attachments Maplink V Notify Alerts V Tools	Line Detail Audits Project Summary Menu	Release Return Return	
Main Terms/Miscel	aneous User Defined					
Purchase Order Deta	ils					
Dept/Loc Fiscal year PO number	IT INFORMATION TECHNOLOGY 2014 * Current Next Period 06 11400000 ************************************	Buyer tony.belsit	accounts applied >>	Original Original	Status 8 - Printed C - Created	
General commodity General description	615 OFFICE SUPPLIES, GENERAL Office Supplies Order			Entered Needed by	12/20/2013	
General Notes	Receiving Structures			Expire Last changed	06/30/2014 15	01
Vendor Details		Shipping Detai	ls			
Vendor	1013 Committed	Ship to	п			
Name	STAPLES					
PO mailing	0		5435 E WASHINGTON ST			
	1981 WODDBURY AVE		-			
			FALMOUTH	IE 04105	-	
	PORTSMOUTH NH 04105	Email	tony.belsito@tylertech.com			
Delivery method	Print Fax E-Mail	Reference	ATTN: Tony Belsito			
Remit	1 STAPLES					
E Vendor/Sourci	ng Notes					





Purchase Order Detail Changes

3. To change the Detail of the Purchase Order, click "Line Detail" in the Menu portion of the Ribbon.

Accept Cancel Search	Advanced Add Add Add Add	Actions	o Text file	eel Word Email IOM Schedule Office	Notes V Audit Attachments Maplink V Notify Alerts V Tools	Upd Ship To Return	
Purchase Order Change Orde	ers - Munis (VIRTUAL SERVER 1)).4EA Train] > Purchase Order	Detall				
Journal Information	Deried 5 5	Heating Date 12/20/2012	Purcha	Se Order	11400000 Line		
Description	Period 5	12/20/2013	Vendor Contra	r 1013 (STAPLES)		•	
Pricing				Detail			
Quantity Unit price GROSS	CURRENT N 10.00 11.49000 114.90	EW		Commodity Inventory Item Item Location Description	61509 3" Avery® Durable View Slant-D"" Rings	Binders with	
Freight Disc %	.00			UOM	EACH	•	Add'l Desc/Notes
TOTAL	114.90			Vendor item number 1099 box Manufacturer Manufacturer item numb	823526]	
Totals				Fix asset	N		
Liquidated Cancelled	0.00	Restore		Bid Dept/Loc Requested by	FIN FINANC		
Open	114.90			Required by Risk claim	Notify Buyer)	
Seq T Account			Descriptio	n Ar	nount GL B *		
1 E 1000-1-135-0	000-00-00-0000-0-5400 -		OFFICE SI	UPPLIES	114.90 U		
K < 1 of 6	>	NQT					

- 4. Click Update an 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 +.
- 5. Provide a reason for performing the change(s) that will post to the GL Journal Entry.

Journal Info	rmation					
Year	2014	Period	6	Effective Date	12/20/2013	15
Description	Update: Q	ty, Price, GL	account			

6. 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
		·

<u>*Note</u>*: 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.





7. 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	т	Account	Description	Amount	GL	в	•	
1	Е	1000-1-135-000-00-00-00-0-5400 -		OFFICE SUPPLIES	209.80	U		
								•

b) Add additional accounts to charge to and split cost

Seq	т	Account	Description	Amount	GL B	*
1	Е	1000-1-135-000-00-00000-0-5400 -	OFFICE SUPPLIES	104.90	U	
2	E	1000-1-155-000-00-00-00-0-5400 -	OFFICE SUPPLIES	104.90	А	
						-

- 8. Click Accept Sto save changes. Then, click Return Sto go back to the Header of the Purchase Order.
- 9. 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.

Confirm Confirm Unchase Order Change O Main Terms/Misce	Add Serverses Add Ser	ext file Wor DF Excel Ema eview Sch t Office	rd ai edule TCM Notify Tools	aplink∨ J erts ∨ i	ine Debiil Audits Yroject Summary Menu	Relcase Retu Retu) m	
Purchase Order Det Dept/Loc Fiscal year PO number General commodity General description	als IT INFORMATION TECHNOLOGY 2014 Current Next Period 04 11400000 615 OFFICE SUPPLIES, GENERAL Office Supplies Order Call Receiving Call Invoices	Buyer tony.bels	ito tt accounts applied	>> () E M E	Original Change Order ntered eeded by xpire ast changed	Status 8 - Printed C - Created 12/20/2013 06/30/2014 12/20/2013	•	
endor Details lendor lame O mailing Delivery method Aemit Delivery Sourci	1013 Committed STAPLES 0 1981 WODDBURY AVE 1981 WODDBURY AVE PORTSMOUTH INN 04105 PRITS Print Pax PRITS STAPLES Inn 04105	Shipping Deta Ship to Email Reference	T T S435 E WASHINGTON ST S435 E WASHINGTON ST FALMOUTH tony.belisito@tylertech.com ATTN: Tony Belsito	ME	04105			
ne Ordered Am 1 2	Junit Liquidated Balance 1st 209.80 0.00 209.80 10 29.85 0.00 29.85 10 258.80 0.00 258.80 258.80	GL Account 00-1-135-000-00-00-0 00-1-135-000-00-00-00-00-00-00-00-00-00-00-00-0	0000-0-5400 - 0000-0-5400 - 0000-0-5400 -		Ô			





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

Totals		Workflow					
Ordered	1127.10	Status					
Liquidated	0.00	My Approvals	Approve	Reject	Hold	Forward	Approvers
Open	1127.10						
K < 2	of 2	K <	Q Att	achments (0)			
<u>One reco</u>	ord will	be the Origina	al PO	<u>On</u>	<u>e record v</u>	vill be the Ch	ange Or
	St	atus				Status	
 Origina 	8	- Printed	•	0	Original	8 - Printed	•
Change	e Order C	- Created	•		Change Orde	C - Created	•
Entered	12	2/20/2013		Ente	ered	12/20/2013	15
Needed by		15		Nee	ded by		15
Expire	06	5/30/2014 15		Expi	ire	06/30/2014	15
Last chang	ed	15	00	Last	changed	12/20/2013	

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

Line Detail Audits Project Summary Menu	Post Return Return			
Original	Status			
 Change Order 	A - Approved	I	•	
Entered Needed by	12/20/2013	15		
Expire Last changed	06/30/2014	15	1	01





• 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.

Home C C		Purchase Order Change Orders - Munis
Wardse Browse Provide Provide	e Word Excel Bool Buyer tony.belsito Project a	Notes V Audit: Maplink V Audits Re-Open PO Mass Close PO ToM Tools Reference PO Tools Reference PO Tools Reference PO Mass Close PO Cancel Po Mass Close PO Cancel Po Mass Close PO Cancel Po Barsury Project Summary Status B - Printed V Entered 12/20/2013 15 Needed by Expire 06/30/2014 15
		Last changed 12/20/2013 15 01
Vendor Details	Shipping Details	
Vendor 1013 Committed	Ship to	FIN
Name STAPLES		
PO mailing 0		2033 SUGAR GROVE AVE
1981 WODDBURY AVE		
		FALMOUTH ME 04105
PORTSMOUTH NH 04105	Email	tony.belsito@tylertech.com
Delivery method	Reference	ATTN: Tony Belsito
Remit 1 STAPLES		
🔊 Vendor/Sourcing Notes		
Line Ordered Amount Liquidated Balance 1st GL	Account	1

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 cancelation 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 cancelation by defining specific criteria as to which GL segments that you wish to cancel those open Purchase Orders containing that criterion

