



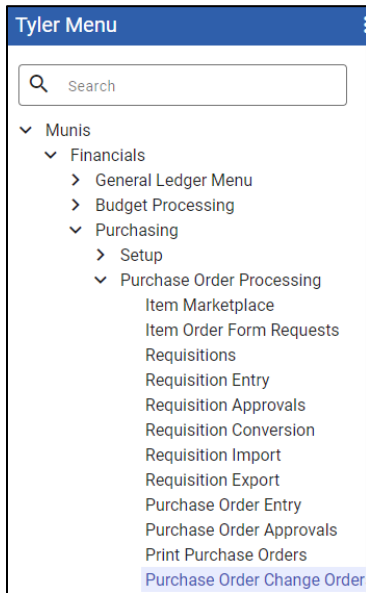
SUMNER COUNTY GOVERNMENT
Munis 2021.2 Purchase Order
Change Order

Section 1 General Information

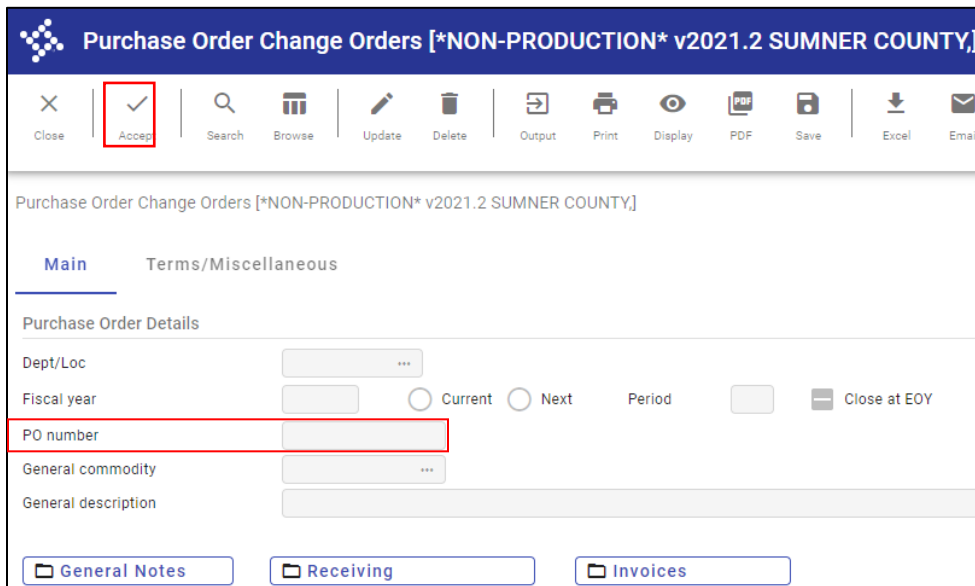
- If a purchase order (PO) needs to be changed (vendor details, account code, amount), this will need to be requested through the Munis Purchase Order Change Order Module.
- If assistance is needed, contact the finance department's purchasing clerk.

Section 2 Procedures

1. From the Tyler Menu, open "Purchase Order Change Order".



2. Click "Search" from the toolbar.
3. Enter the PO number that needs to be changed.
4. Click "Accept" from the toolbar.



5. To make changes to the vendor details
 - a. Click “Update” from the toolbar, tab to “Vendor Details”, make necessary changes, and click “Accept”.

Purchase Order Change Orders [*NON-PRODUCTION* v2021.2 SUMNER COUNTY]

Close Accept Search Browse Update Output Print Display PDF Save Excel Email Schedule Attach Line Items Notes Audits Cancel PO Close PO Re-Open PO Mass Cancel PO Mass Close PO Cancel by G

Purchase Order Change Orders [*NON-PRODUCTION* v2021.2 SUMNER COUNTY]

Main Terms/Miscellaneous

Purchase Order Details

Dept/Loc: 521 Finance-Accounting & Budg
 Fiscal year: 2022 Current Next Period: 04 Close at EOY
 PO number: 22000238
 General commodity: ...
 General description: testing

Buyer: jallison
 Project accounts applied:
 Receive By: Quantity Amount

General Notes Receiving Invoices

Vendor Details

Vendor: 100248 Committed
 Name: CANON SOLUTIONS AMERICA INC
 PO mailing: 0
 300 COMMERCE SQUARE BLVD
 BURLINGTON NJ 8016

Shipping Details

Ship to: 520110
 Sumner County Finance
 355 North Belvedere Drive
 Room 302
 Gallatin
 Email: dlawing@sumnercountytn.gov
 Reference:

Delivery method: Print Fax E-Mail
 Remit: 1 CANON SOLUTIONS AMERICA I
 Deliver To

Vendor/Sourcing Notes

- b. Click “Release” from the toolbar.

Purchase Order Change Orders [*NON-PRODUCTION* v2021.2 SUMNER COUNTY]

Close Accept Search Browse Update Delete Output Print Display PDF Save Excel Email Schedule Attach Line Items Notes Audits Release Update Journal Detail

Purchase Order Change Orders [*NON-PRODUCTION* v2021.2 SUMNER COUNTY]

Main Terms/Miscellaneous

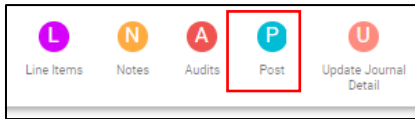
- c. When the following message appears, click “Approve”.

Munis

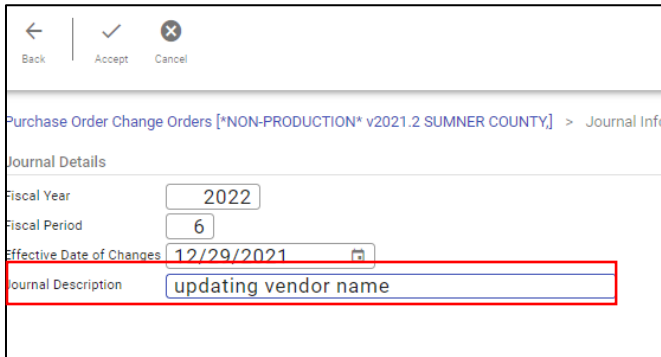
Warning!
 No Workflow Business Rule approval conditions were met.
 No pending actions were created for the PO:
 2022 22000238

Approve Cancel

d. Click “Post” from the toolbar.

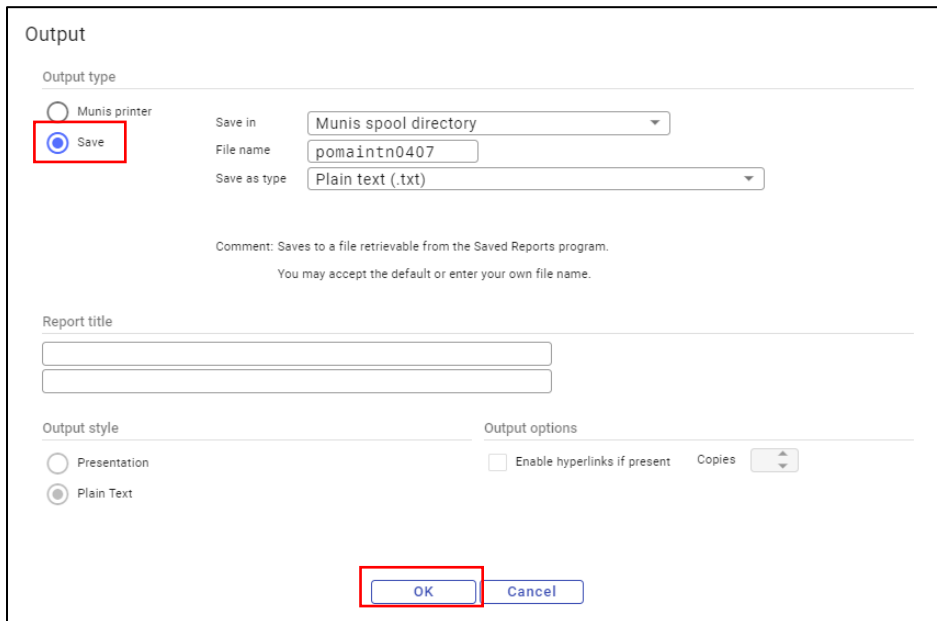


e. Enter a short “Journal Description” of why the change is being requested.



f. Click “Accept”

g. An “Output” box will appear. Click “Save” and “OK”.



6. To make changes to the account code or amount
 - a. Click “Line Items”, then click “Update” from the toolbar.



- b. Enter a brief but detailed “Description”, as much as possible, of what is being changed (i.e., increased quantity, increased dollar amount, change account code, etc.).
- c. If updating the quantity or dollar amounts, tab to “New”, and update the fields as necessary.
 - Usually only the quantity and/or unit price will be changed
 - The other fields will automatically update
- d. Tab to the “Account” line; this will cause the “Amount” field at the bottom to update if they were changed. Update the account number if needed.
- e. Click “Accept”
- f. Click “Back” to return to the previous screen.

Purchase Order Change Orders [*NON-PRODUCTION* v2021.2 SUMNER COUNTY] > Line Items

Journal Information
 Fiscal Year: 2022
 Description: larger quantity
 Effective Date: 12/29/2021

Purchase Order
 Fiscal Year: 2022 Number: 22000238 Line: 1
 Vendor: 100882 (OFFICE DEPOT)
 Contract:

Pricing

	CURRENT	NEW
Quantity	1.00	1.00
Unit Price	1,000.00000	1,500.00000
GROSS	1,000.00	1,500.00
Freight	0.00	0.00
Discount %	0.00	0.00
Credit	0.00	0.00
TOTAL	1,000.00	1,500.00

Totals

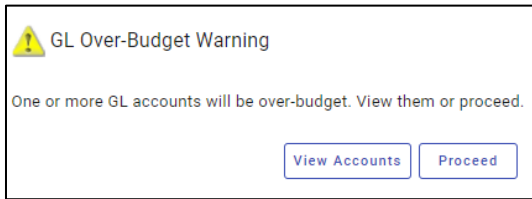
Liquidated	0.00	Modify
Cancelled	0.00	Restore
Open	1,000.00	

Description: maintenance agreement for copy machines

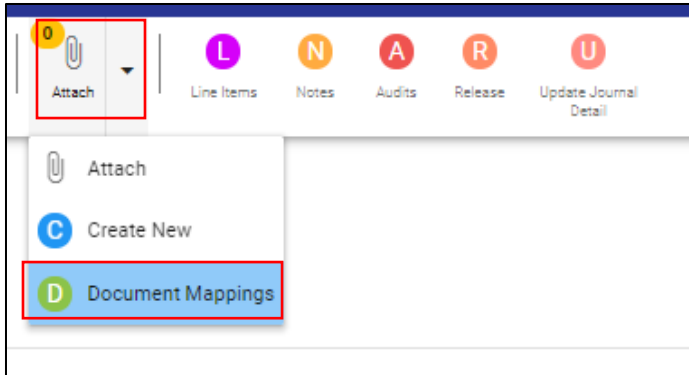
UOM: EACH

Account: 101-0000-52100-521-1100-52-533400- | Amount: 1,500.00 | U

- g. If the following pop-up message appears, the budget has been exceeded. A completed “Budget Adjustment Request” form will need to be submitted to the finance department before the PO change order can be approved.



7. If there are any supporting documents for the change order, attach them in Munis through the Tyler Content Manager (TCM).
 - a. Click on the drop down arrow next to “Attach” in the toolbar.
 - b. Click “Document Mappings”.



- c. Double Click “PO Attachment”.

Document Mappings

Attached Documents

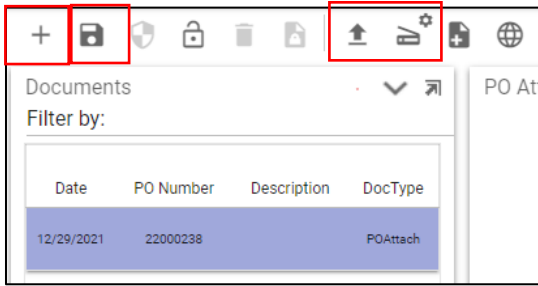
Attachment Type	Document Type	Read Only	Count	Required	Include in Launch
PO Attachment	PO Attachment		0	Yes	Yes
eSignature Archive	eSignature Archive	Yes	N/A		Yes
eSignature Combined PDF	eSignature Combined PDF	Yes	N/A		Yes
eSignature Source File	eSignature Source File	Yes	N/A		Yes

Associated Documents

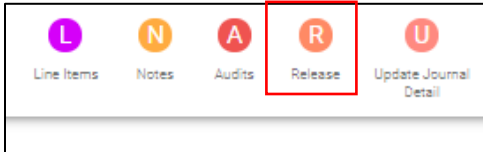
Document Title	TCM Document Type	Read Only	Count	Include in Launch
PO Change Order	PO Attachment		0	Yes
PO Receivable	PO Receivable	Yes	0	Yes
Purchase Order	Purchase Order	Yes	2	Yes
Penetration Attachment	Penetration Attachment	Yes	0	Yes

[View Documents](#) TCM Version: 2021.3.1 Show Counts

- d. Click “+” for new.
 - e. Click the scan or import icon, and attach the backup documentation.
 - f. Click “Save”, and close the TCM window.



8. Click “Release” from the toolbar to release the change order to the finance department for approval.



9. After the change order has been approved, follow the steps in “Requesting a Purchase Order” to print the revised PO.