



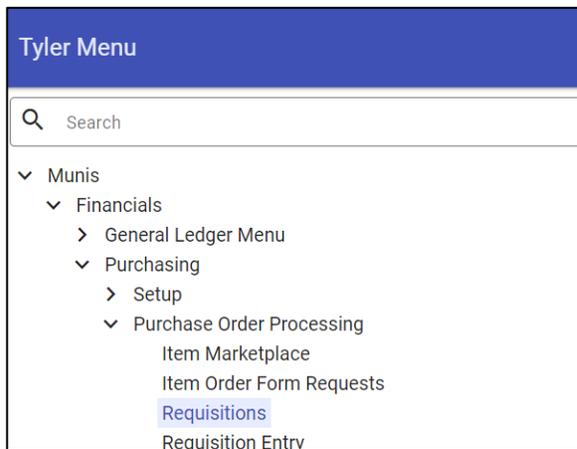
SUMNER COUNTY GOVERNMENT
Munis 2021.2 Correcting a
Rejected Purchase Order

Section 1 General Information

- A. Purchase order (PO) requisitions may be rejected by the finance staff. The most common reasons for PO requisition rejections.
- an incorrect or missing vendor
 - an incorrect account code
 - an incorrect price
 - a missing or incomplete description
 - missing or incomplete documentation
- B. If the end user receives an email stating a PO requisition has been rejected, corrections must be made to the requisition before the PO can be approved.

Section 2 Procedures

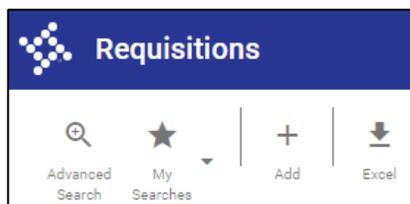
- A. From the Tyler Menu, open “Requisitions”.



- B. If the requisition number is known, it may be entered in the search box.



- C. If the requisition number is not known, click on “Advanced Search” to see a list of all requisitions.



D. When the next screen opens, click “Search”.

Advanced Search

My searches: Select a search

Clear search criteria

Startup search

Fiscal Year: [] Requisition Number: [] Created on: [] Entered by: []

Status: Choose status [] Needed by: [] General Commodity: []

Department: [] Bid: [] Item: []

Vendor: [] Purchase Order: [] Receive by: []

Contract: [] Work Order: [] Buyer: []

Project String: E- [] CLEAR []

GL Account: E- [] CLEAR []

Search Save Save As Reset Cancel

E. At the pop-up box, click “OK” to continue.

Search

You have not specified any search criteria.

Would you like to continue and load all requisitions?

OK Cancel

F. This will produce a list of all requisitions the end user has created with the most current showing at the top of the list.

G. Click on the requisition that needs to be updated.

H. When the requisition opens, click “Activate” from the toolbar.

Back Add Delete Excel Mass Allocate Duplicate Custom Interface Notes Actions/ Approvers Release Activate My Approvals Attach

I. Click “Ok” to activate the requisition.

Activate?

Are you sure you want to activate this requisition?

OK Cancel

- J. If the rejection is for missing documentation, click the “Attach” icon in the toolbar, and attach the documentation either by importing or by scanning directly into the Tyler Content Manager (TCM) as shown in the “Requesting a Purchase Order” instructions.
- K. If the rejection is for missing or incorrect data, click on the account line that needs to be corrected.

Items (1)						
Add Item						
Delete	Line	Description	Qty	UOM	Unit Price	Line Total GL Account
	1	Office Supplies for the Finance Department	4.00	EACH	\$125.00000	\$500.00 E (101-0000-52100-521-1100-52-543500-) Office Supplies

- The following screen will open, tab to the field(s) that needs to be corrected, and update the information accordingly.

The screenshot shows the 'Requisitions' interface for requisition 2022/335. The 'Item Details' section includes fields for 'Commodity', 'Inventory Item', 'Location', 'Pick Ticket', 'Purchase', and 'Description'. The 'Vendor' section shows details for '(100882) OFFICE DEPOT' with address '6600 NORTH MILITARY TRAIL, BOCA RATON, FL 33496'. The 'Ship to' section shows 'Summer County Finance' at '355 North Belvedere Drive, Room 202, Gallison, TN 37066'. The 'Quantity' is 4.00, 'Unit Price' is \$125.00000, and 'Unit of Measure' is EACH. The 'Line Item Total' is \$500.00. The 'Allocations (1)' section shows a table with columns for 'GL Budget code', 'Percent', and 'Amount'. The table contains one row with GL Budget code 'A', Percent '100.000', and Amount '\$500.00'. The total is 100.000 and \$500.00.

- L. After all corrections have been made, click “Save” in the bottom right corner.
- M. Click “Release” from the toolbar.
- N. The following pop-up box will appear; click “OK”.

The screenshot shows a pop-up dialog box titled 'Release Requisition?'. The text inside the box asks 'Are you sure you want to release the current requisition into workflow?'. At the bottom right of the box are two buttons: 'OK' and 'Cancel'.

- O. This will release the PO requisition to the finance department. An email should be generated within two hours indicating the PO request has been either approved or rejected.
 - If the PO request is rejected again, repeat the steps listed here until it is approved.
 - If the PO request is approved, follow the steps in the “Requesting a Purchase Order” instructions to print the PO.