# SUMNER COUNTY GOVERNMENT
Munis 2021.2 Correcting a Rejected Purchase Order

<u>Section 1</u> 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.
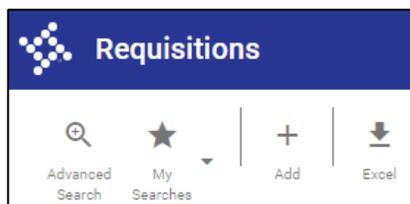
<u>Section 2</u> Procedures

A. From the Tyler Menu, open "Requisitions".
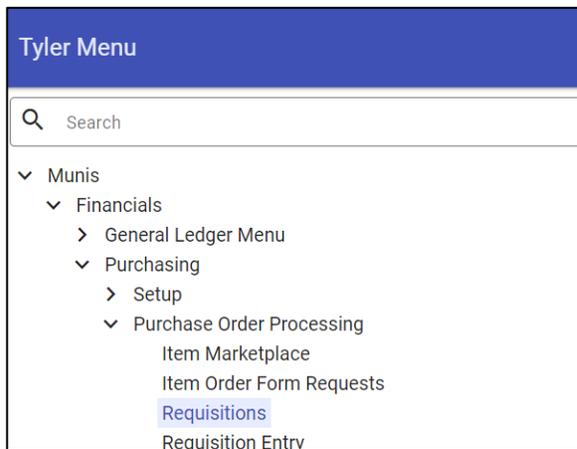
B. If the requisition number is known, it may be entered in the search box.

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".

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

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.

I. Click "Ok" to activate the requisition.

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.

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

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".

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.