# PO Change Order

## This MUNIS reference guide covers the following topics:

- Searching for a Posted or Printed PO to Change
- Changing the PO Header
- Updating Demographic Information
- Updating Line Detail
- Changing quantity and pricing
- Updating a GL Account
- Adding Line Items
- Removing Line Items

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## Creating a Purchase Order Change Order

Entering a Purchase Order Change Order is the only way to change a PO that has been printed or posted.  Typical changes include:

- Change PO header information
- Change pricing
- Change quantity ordered
- Add or remove line items
- Change general ledger allocation

A PO must have a status of **Printed** or **Posted** before a change order can be created.

If you need to cancel a PO, contact Procurement Services.

The basic steps involved in creating a Purchase Order Change Order:

1. Search for the Purchase Order to be changed
2. Enter a description of the change in the Journal Information area
3. Change header and/or line items
4. Release
5. Post after approval

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## Create a Purchase Order Change Order:

1. From the Tyler Menu, select Financials>Purchasing>Purchase Order Processing>Purchase Order Change Order.
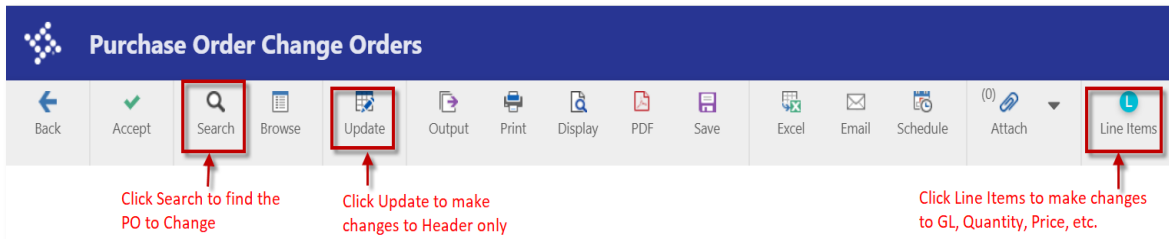


2. From the Purchase Order Change Orders screen, click Search.
3. Type the PO number if known or use Search to locate the PO
4. Click Accept.
5. Click Browse. Sort the Purchase Order # column in descending order.
6. Choose a PO with a printed or posted status that does not already have a change order (PO Status column), click Accept.
7. Note the PO Number.

## Purchase Order Header Changes

1. In the Main and Terms/Miscellaneous screens of the Purchase Order Change Order program, some fields you can are:
   - General commodity code
   - Change vendor details
   - Change reference name and phone
   - Change Bill to / Ship to locations

## Change the Header information:

1. Click Update.
2. Change any of the available fields on the Main or Terms/Miscellaneous tabs.
3. Change or Add the contact person and phone number in the Reference field, if desired
4. Click Accept.  Notice the Status fields for the Original and Change Order.

## Change Line Details

1. In the Line Detail screen of the Purchase Order Change Order program, you can:

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- change quantity and pricing
- change the GL allocation
- add new line items
- cancel PO line items



## Make changes to the ordered items on a PO

1. Click Line Detail in the Toolbar.
2. In the Toolbar, click Update
3. Complete the Journal Information section.
4. Tab to description.
5. Tab
   a. The Journal Information will save and the Pricing and other fields will open
6. Update pricing, quantity, Line Description, Freight as desired
   a. 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 change order is approved.
7. Tab through the fields until you get to the GL Accounts (Org/Object).  Once your curser is in the ORG field, the amount will update to match the new pricing/quantity entered.
8. Accept

When updating the GL area for the line 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 from the original Purchase Order, or you can update and/or split the GL Account and charges.

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## Add a second detail line

1. Click Add while in the Purchase Order Line Detail screen.
2. Fill in the line detail and GL allocation to order another item (tab passed commodity).
3. For this exercise, order an item of your choice and allocate it to one of your own department's Org & object code.
4. Click Accept to accept the new line item.

## Accepting Changes and Releasing the Change Order

1. Click BACK to go back to the Header of the Purchase Order.  Notice that the Status of the Change Order is C – Created.

|  | Status |
| --- | --- |
| ○ Original | 8 - Printed ▾ |
| ◉ Change Order | C - Created ▾ |
| Signature Status | NONE ▾ |

Change Order for year/period 2021/09

2. Click Release in the Menu portion of the Ribbon.  The Status of the Change Order is changed to P - Pending.

|  | Status |
| --- | --- |
| ○ Original | 8 - Printed ▾ |
| >> ◉ Change Order | P - Pending ▾ |
| Signature Status | NONE ▾ |

Change Order for year/period 2021/09

## Temporary Duplicate Purchase Order Number

There will be two records for the same Purchase Order number until the PO Change Order has been approved.  This feature allows the Approver to compare the original and the change order.
Note: from the HUB Approval tile, you will only see the final PO Changes. To view original PO and PO change order, open PO Change Order and search for that PO and Browse or navigate between Original and Change Order record.

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Once you open the purchase order, you can navigate between the two records.

## View the purchase order and change order in Purchase Order Change Orders

1. From the Tyler Menu, click Financials>Purchasing>Purchase Order Processing>Purchase Order
2. Change Orders.
3. Click Search.
4. Type the purchase order number in the PO number field.
5. Click Accept.
6. Notice 1 of 2 in the Navigation bar.
7. Notice the Status of the Original and Change Order.  The red arrows are a visual clue as to which record is displayed.
8. Click Browse.
9. Notice that there are two records for the same purchase order number.  The Change Order column indicates which record is the original and which is the change order.

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## Wildcards

| Wildcards *not all are available in all fields* | | | |
|---|---|---|---|
| **Symbol** | **Description** | **Examples** | **Results** |
| * | wildcard for zero or more characters. | supp*<br>*aut*<br>T*eresa | supply, supplies, support<br>automobile, automotive, caution<br>Teresa, Theresa |
| ? | single wildcard | 201? | 2014, 2015 (not 201000) |
| < | less than | <5000 | numbers less than 500 |
| > | greater than | >1000 | numbers greater than 1000 |
| <= | less than or equal to | <5000 | numbers up to and including 500 |
| >= | greater than or equal to | >1000 | numbers 1000 and up |
| = | is null | = | all except those that are blank |
| !=<br><> | not equal to | ! =2<br><>2 | anything except 2 |
| :<br>.. | range | 11500001:11500010<br>11500001..11500010 | 11500001, 11500002 etc. to 11500010 |
| \| | or | 710\|720 | 710 or 720 |