MUNIS Purchase Order Change Orders

Hampton City Schools Cheat Sheet

USE CHROME WEB BROWSER ONLY

Accounts Payable is authorized to pay 10% over your PO up to $300.00.

Anything over will need a Change Order.

To Create a Change Order

Complete this procedure if you need to modify a Purchase Order

1. Open the **Tyler Menu**, then
   a. **Financials**
   b. **Purchase Order Central**
2. Click **Advanced Search**.
3. In **Purchase Order Number** , type the PO number or search for all Purchase orders for your department.
4. Click **Search**.
5. Click on the Number to open the Purchase Order.
6. Select **Change Order from Ribbon**. **Please note that if you start a change order and leave the page, you will need to go directly to Purchase Order Change Orders instead of going from the Purchase Order.**
7. *If the PO has Department, shipping or address changes then:*
   a. Click **Update**.
   b. In Description type a reason for the change.
   c. Change the department, address or ship to Address.
   d. Click **Accept** in the top ribbon.
   e. If no changes to the line items, click **Release** to release into workflow.

*****Never make a change to the vendor name. If the vendor is incorrect, the PO will need to be closed and a new requisition will need to be entered.*****

8. *If you need to change the quantity, unit price, select **LINE ITEMS** from the top ribbon then:*
   a. Click **Update**.
   b. In Description type a reason/description for the change.
   c. Under ***NEW*** change the Quantity or Unit Price and tab. ***MAKE SURE TO ENTER THE NEW TOTAL FOR THE LINE, NOT THE DIFFERENCE.***
   d. Click **Accept** in the top ribbon.
   e. Click **Back.**
   f. Click **Release** to release into workflow.

*****Note: If closing a PO or a line on a PO where no payments have been made, change Unit Price to zero. If payments have been made, the new amount must be changed to the liquidated amount.**

9. *If you need to add a line, to the PO then:*
   a. Click **Add**.
   ***b.* In Description enter a general description for the new line.**
   c. Enter Unit Price.
   d. Enter Account.
   e. Description will autofill from the Account.
   f. Enter Amount.
   g. Click **Accept.**
   h. Click **Back**.
   i. Click **Release** to release into workflow.

Use TCM to attach any required documentation to the CHANGE ORDER.

See TCM instructions.