

PURCHASE ORDER CHANGE ORDER - LINE WITHOUT SALES TAX (TEMPORARY WORK AROUND STEPS) (Munis 2021.5)

1. PO Change Order Menu Option
2. Select Search and enter PO Number to be updated
3. Select Line Items on ribbon
4. Select UPDATE, enter a description for the change order- hit ACCEPT
5. Tab to Dollar Amount – Enter new dollar amount
6. Tab and make taxable amount zero
7. Tab to the G/L line
8. Hit ACCEPT
9. **System will add tax back in** (Tyler Technology is working on software fix.)
10. Save by clicking Accept Key at top of screen
11. Then hit Update Key
12. Then select Modify Tax Groups

Purchase Order Change Orders [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items >

Journal Information

Year Period Effective Date

Description

Pricing

	CURRENT	NEW
Quantity	<input type="text" value="1.00"/>	<input type="text" value="1.00"/>
Unit Price	<input type="text" value="1,000.00000"/>	<input type="text" value="1,000.00000"/>
GROSS	<input type="text" value="1,000.00"/>	<input type="text" value="1,000.00"/>
Freight	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Discount %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Credit	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Taxable Amount	<input type="text" value="1,000.00"/>	<input type="text" value="1,000.00"/>
Sales Tax Amount	<input type="text" value="79.75"/>	<input type="text" value="79.75"/>
TOTAL	<input type="text" value="1,079.75"/>	<input type="text" value="1,079.75"/>

Totals

Liquidated Modify

Cancelled Restore

Open

13. Under Modify tax groups – Click on APSalesGroup1

← | ✓ | ✕
Back | Accept | Cancel

Purchase Order Change Orders [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items

Sales tax group ... Sales tax rate

Use tax group ... Use tax rate

14. Change 7.975 to .00

← | ✓ | ✕
Back | Accept | Cancel

Purchase Order Change Orders [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items >

Sales tax group ... Sales tax rate

Use tax group ... Use tax rate

15. Hit Accept

16. Change taxable amount to .00 on PO Change Order Line and hit ACCEPT.

Back | Accept | Cancel

Purchase Order Change Orders [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items > ✎

Journal Information

Year: 2023 | Period: 2 | Effective Date: 08/25/2022

Description: TEST SALES TAX ON POCO

Pricing

	CURRENT	NEW
Quantity	1.00	1.00
Unit Price	1,000.00000	1,000.00000
GROSS	1,000.00	1,000.00
Freight	0.00	0.00
Discount %	0.00	0.00
Credit	0.00	0.00
Taxable Amount	1,000.00	0.00
Sales Tax Amount	79.75	0.00
TOTAL	1,079.75	1,000.00

Modify tax groups

17. PO Change Order Line Amount and G/L Amount are Now the Same and do NOT include sales tax (Please note – you are not seeing the original line amount that you saw when starting the change order – this is your PO Change Order line)

Freight	0.00	0.00	
Discount %	0.00	0.00	
Credit	0.00	0.00	
Taxable Amount	1,000.00	0.00	Descri
Sales Tax Amount	79.75	0.00	
TOTAL	1,079.75	1,000.00	

Modify tax groups

Totals

Liquidated	0.00	Modify	UOM
Cancelled	0.00	Restore	Vendo
Open	1,079.75		1099 b
			Manuf
			Manuf
			Capita
			Bid
			Dept/L
			Reque
			Requir

Seq	T	Account	Description	Amount	GL Bud
1		430008-646-1400-9646-3140-0000-0-60001-	SUP NON-CL EPA NURSING	1,000.00	U

18. HIT ACCEPT

19. HIT BACK BUTTON

20. You are now back at PO Change Order Header and can release the POCO

Close | Accept | Search | Browse | Update | Delete | Output | Print | Display | PDF | Save | Sync | Email | Schedule | Attach | Line Items | Notes | Approve | Release | Update Journal Detail | Print PO

Purchase Order Change Orders [V2021.5 PRODUCTION DATABASE JULY 16 2022]

Main | Terms/Miscellaneous

Purchase Order Details

Dept/Loc: 646 40-05 NURSING | Buyer: LaceyWolf | Status: 8 - Printed

Fiscal year: 2023 | Period: 01 | Close at EOY: | Change Order: C - Created

PO number: 23001023 | General commodity: 300 OPEN PO OR MAINT AGREEMENT | Entered: 08/25/2022

General description: OPEN PO OR MAINT AGREEMENT | Inspector: | Needed by: 07/01/2022

Receive By: Quantity Amount | Expire: 06/30/2023

Vendor Details: Vendor: 359069 | Name: WALMART COMMUNITY | PO mailing: 0

Shipping Details: Ship to: OP | OPEN PURCHASE ORDER

Last changed: 08/25/2022

21. POCO will release to Purchasing Dept for processing (Status 8) unless Principal /Dept Approval is needed (Status 6) Purchasing staff cannot process anything in Status 6 – Principal/Dept must approve