

Tyler Topic: Purchase Order Change Orders

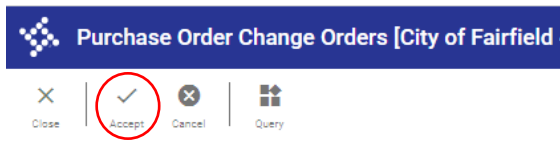
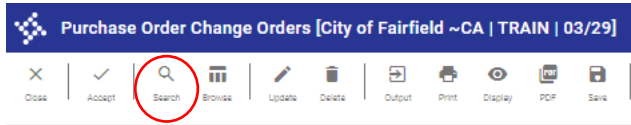
1) From the Tyler Menu, go to Financials>Purchasing>Purchase Order Processing>Purchase Order Change Orders

Tyler Menu

- ^ Enterprise ERP
 - ^ Financials
 - ^ General Ledger Menu
 - ^ Budget Processing
 - ^ Purchasing
 - ^ Setup
 - ^ Purchase Order Processing
 - Item Marketplace ☆
 - Item Order Form Requests ☆
 - Requisitions ★
 - Requisition Entry ☆
 - Requisition Approvals ☆
 - Requisition Conversion ☆
 - Requisition Import ☆
 - Requisition Export ☆
 - Purchase Order Entry ☆
 - Purchase Order Approvals ☆
 - Print Purchase Orders ☆
 - Purchase Order Change Orders ★

2) If you know the PO number, click the Search Icon and type in the PO number and hit Accept. If you do not know the PO number, you can Browse all the PO's to find the correct one.

Search by PO number:



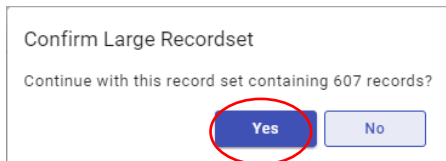
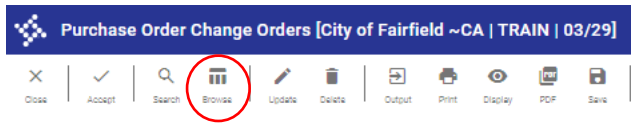
Purchase Order Change Orders [City of Fairfield ~CA | TRAIN | 03/29] > 🔍

Main | Terms/Miscellaneous | User Defined

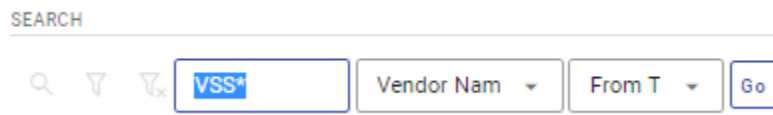
Purchase Order Details

Dept/Loc	<input type="text"/>
Fiscal year	<input type="text"/> <input type="radio"/> Current <input type="radio"/> Next
PO number	<input type="text" value="249"/>
General commodity	<input type="text"/>
General description	<input type="text"/>

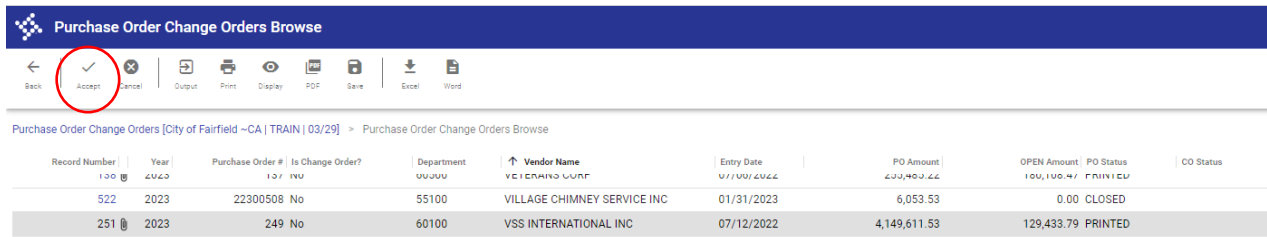
Browse all PO's:



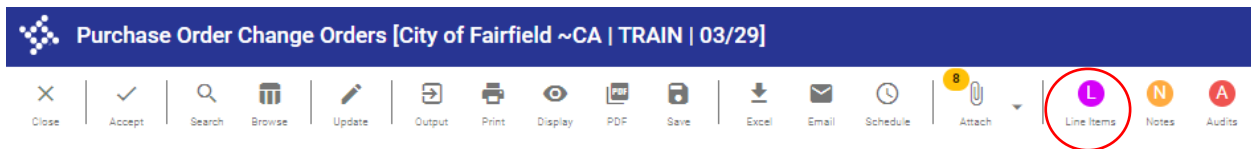
The Search function can be used at the bottom left of the next screen to Search by Vendor Name. Enter a portion of the Vendor name with the * symbol, Use Vendor Name in the first drop-down option, and From Top in the last drop-down. The Click Go.



Double click the correct PO or hit Accept after selected.



3) Once the PO is open on the screen, click the “L” Line Items skittle.



4) This will bring up the total original PO amount, as well as the allocations per account code. If you have multiple account codes for the PO, you will want to screenshot this to use later. Click on the Update pencil icon.

Line Items

← Back | 🔍 Search | ⊕ Add | ✎ Update | Ⓟ View Ship To | Ⓢ C Canc PO Line

Purchase Order Change Orders [City of Fairfield ~CA | TRAIN | 03/29] > Line Items

Journal Information

Year Period Effective Date

Description

Pricing

	CURRENT	NEW
Quantity	1.00	<input type="text"/>
Unit Price	4,149,611.53000	<input type="text"/>
GROSS	4,149,611.53	<input type="text"/>
Freight	0.00	<input type="text"/>
Discount %	0.00	<input type="text"/>
Credit	0.00	<input type="text"/>
TOTAL	4,149,611.53	<input type="text"/>

Totals

Liquidated	4,020,177.74	Modify
Cancelled	0.00	Restore
Open	129,433.79	

Seq	Org	Obj	Proj	Description	Amount	GL Bud
1	25260199	9505	10201	PJCT CST-CONSTRUCTION	3,679,803.06	A
2	25460199	9505	10059	PJCT CST-CONSTRUCTION	106,808.47	U
3	46560899	9505	10421	PJCT CST-CONSTRUCTION	363,000.00	U

5) Type in a description for the Update (PO Increase, PO Decrease, etc.). You may also have to change the period field to match the desired Effective Date (For example- Period 1 is July, Period 2 is for August, etc.). Then hit Accept.

Line Items

← Back | ✓ Accept | ✕ Cancel

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Journal Information

Year Period Effective Date

Description

6) This will open up the fields under NEW to type in the new PO amounts. The field under CURRENT are the original PO amounts. **THIS IS IMPORTANT**- instead of typing in the amount of the increase/decrease, you have to add/subtract the increase/decrease amount to the CURRENT Unit Price to get the NEW Unit Price.

For this example- we are going to increase this PO by \$50,000. CURRENT Unit Price of \$4,149,611.53 + \$50,000 Increase = \$4,199,611.53 NEW Unit Price. Type this new amount in the Unit Price field and hit tab. This also might be useful to screenshot and save and include in your TCM attachment so the approvers know how you arrived at the new amount.

❖ **Line Items**

← Back | ✓ Accept | ✕ Cancel | U Update Ship To

Purchase Order Change Orders [City of Fairfield ~CA | TRAIN | 03/29] > Line Items >

Journal Information

Year: 2023 | Period: 10 | Effective Date: 04/04/2023

Description: INCREASE PO CHANGE ORDER #1

Pricing

	CURRENT	NEW
Quantity	1.00	1.00
Unit Price	4,199,611.53000	4,199,611.53000
GROSS	4,199,611.53	4,199,611.53
Freight	0.00	0.00
Discount %	0.00	0.00
Credit	0.00	0.00
TOTAL	4,199,611.53	4,199,611.53

Totals

Liquidated	4,020,177.74	Modify
Cancelled	0.00	Restore
Open	179,433.79	

Seq	Org	Obj	Proj	Description	Amount	GL Bud
1	25260199	9505	10201	PJCT CST-CONSTRUCTION	3,724,142.19	A
2	25460199	9505	10059	PJCT CST-CONSTRUCTION	108,095.44	U
3	46560899	9505	10421	PJCT CST-CONSTRUCTION	367,373.90	U

7) This will also open up the GL account codes and amounts at the bottom of the screen. Tyler will automatically spread the increase amongst the different lines. If you only have one account code, this is not an issue. If you have multiple account codes on the same PO line, and you only want the increase on one of the account code lines, you will have to manually update these numbers (this is where the screenshot from earlier will come in handy).

For this example, we only want the increase to be reflected on the last line for the 465 account code so we have to change the other two lines back to their original amounts from the screenshot we took earlier. Then add the \$50,000 increase to the original amount on the 465 account code line from the screen shot earlier and type in the new amount and hit Accept. Click through any budget warnings and hit No if the Fixed Asset window pops up.

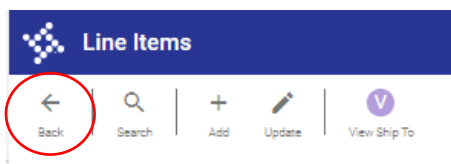
Seq	Org	Obj	Proj	Description	Amount	GL Bud
1	25260199	9505	10201	PJCT CST-CONSTRUCTION	3,679,803.06	A
2	25460199	9505	10059	PJCT CST-CONSTRUCTION	106,808.47	U
3	46560899	9505	10421	PJCT CST-CONSTRUCTION	413,000.00	U

This is the only line that changed amounts, the other lines were changed back to their original amounts from Step 4.

8) If there are multiple lines on the PO that need to be updated, use the arrows in the bottom left corner to move to the next line item and update if needed. In this example, there was only one line item so it shows 1 of 1.



9) Once finished with all line items, hit the Back Arrow.



10) Attach the back-up documents in TCM using the Attach Paperclip icon. Once the back-up is attached in TCM, hit the "R" Release skittle to release to workflow.



11) If you need to come back to view the Change Order (or let's say you didn't have the attachments ready or forgot to Release it), follow steps 1 & 2 to bring the PO back up in the Purchase Order Change Order screen. The bottom left corner will now show there two records for this PO. The first record is the original PO, and the second record is the PO Change Order.

Main Terms/Miscellaneous User Defined

Purchase Order Details

Dept/Loc: 60100 PUBLIC WORKS ADMINISTRATI

Fiscal year: 2023 Current Next Period: 01 Close at EOY

PO number: 249

General commodity:

General description: PAVEMENT MAINTENANCE PROJECT PO22565

General Notes Receiving Invoices

Vendor Details

Vendor: 77 Committed

Name: VSS INTERNATIONAL INC

PO mailing: 0

3785 CHANNEL DR

WEST SACRAMENTO CA 95691-3421

Delivery method: Print Fax E-Mail

Remit: 0

Vendor/Sourcing Notes

Line Items

Line	Ordered Amount	Liquidated	Balance	1st GL Account
1	4,149,611.53	4,020,177.74	129,433.79	25260199-9505-10201

Totals

Ordered	4,149,611.53
Liquidated	4,020,177.74
Open	129,433.79

1 of 2 < > >|

12) To see where this is going in Workflow, go to the Change Order record (record 2 of 2). In the bottom right corner of the screen, hit the Approvers button.

Workflow

Status

My Approvals Approve Reject Hold Forward **Approvers**

Select the Current POM Approvers and click OK.

Options X

Choose an option

- Current POM Approvers
- REQ Approvers
- RQC Approvers

Cancel

OK

This will show all the approval steps and where it currently is in the Workflow process. Click on Expand All at the bottom to see the people assigned in each step.

Current POM Approvers

BackSearch

Purchase Order Change Orders [City of Fairfield ~CA | TRAIN | 03/29] > Current POM Approvers

Originator

Name	Comment
Weihe, Kristan	

Approvers' comments

Name	Action taken date	Action taken	Action	Comment
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Steps

Step	Status	Activated Date	Activated TI
▼ 20	In Progress		
▼ Any approver from this group c Group Current			
Lewis, Christiana		04/04/2023	13:56
Park, Lydia		04/04/2023	13:56
Keller-Lundberg, Megan		04/04/2023	13:56
Minton, Melissa		04/04/2023	13:56
▼ By source business rule - Any Group Current			
Lewis, Christiana		04/04/2023	13:56
▼ 25	Not started		
▼ Any approver from this group c			
Vong, David			
▼ 30	Not started		
▼ Any approver from this group c			
Riley, Jason			
Panganiban, Ryan			
▼ 35	Not started		
▼ Any approver from this group c			
Panganiban, Ryan			
▼ 40	Not started		
▼ Any approver from this group c			
Kaushal, Paul			
▼ 45	Not started		
▼ Any approver from this group c			
Ballard, Kelly			
▼ 50	Not started		
▼ Any approver from this group c			
Gassaway, David			
▼ 60	Not started		
▼ Any approver from this group c			
de Guzman, Julie			
Weihe, Kristan			

Generate CheckExpand AllCollapse AllExpand In Progress