



RICHLAND ONE

ENGAGE • EDUCATE • EMPOWER

**MUNIS v2018
Requisitions /Approvals &
Purchasing Order Receiving**

**End-User Training Guide
Richland County School District One
January 14-18, 2019**

Table of Content

Log In Steps	3
Requisition	8
Requisition Approval (PRINCIPALS/DIRECTORS ONLY)	16
Purchase Order Receiving	22
Returning Items After Entering a Receiving Record	29
Handling Rejected Requisitions.....	34
Additional Resource Tools.....	35

Step 1: Log-in to MUNIS

Click on the following Desktop icon:



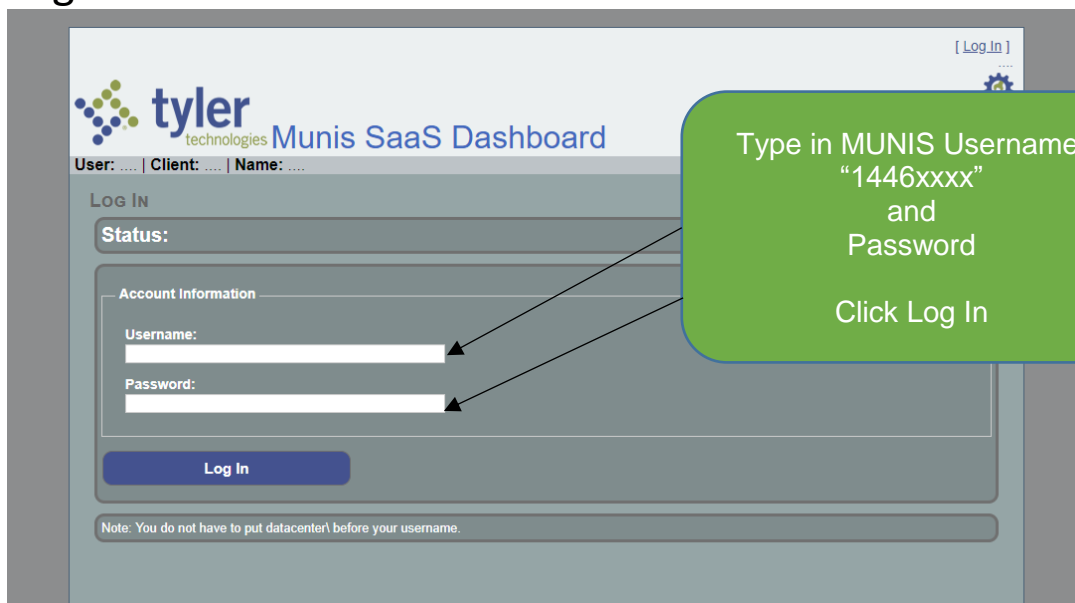
or

Type the following link into “Chrome”:

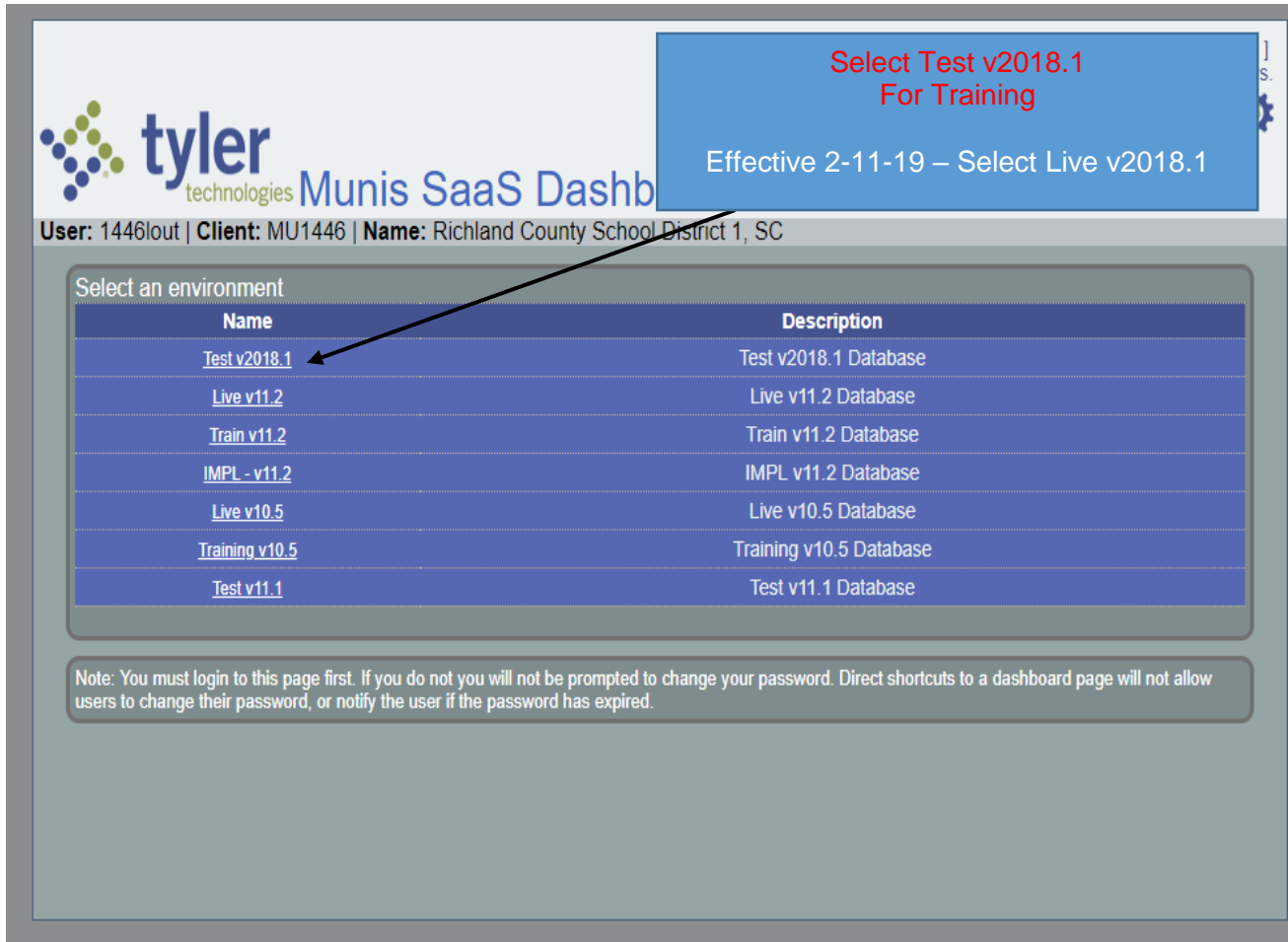
<https://saasdashboard.tylertech.com>

Step 2:

Log-in with Credentials:

A screenshot of the Tyler Technologies Munis SaaS Dashboard login page. The page has a light blue header with the Tyler Technologies logo and the text 'Munis SaaS Dashboard'. Below the header, there is a 'LOG IN' section. The 'LOG IN' section contains a 'Status:' field, an 'Account Information' section with 'Username:' and 'Password:' input fields, and a 'Log In' button. A green callout box with a blue border is overlaid on the right side of the page, containing the text: 'Type in MUNIS Username: "1446xxxx" and Password' and 'Click Log In'. Arrows point from the callout box to the 'Username:' and 'Password:' input fields. At the bottom of the page, there is a note: 'Note: You do not have to put datacenter before your username.'

Step 3:



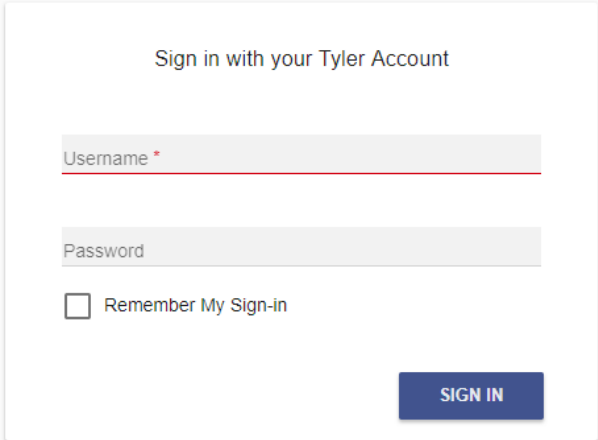
The screenshot shows the Tyler Technologies Munis SaaS Dashboard. At the top left is the Tyler Technologies logo. To the right, a blue callout box contains the text: "Select Test v2018.1 For Training" and "Effective 2-11-19 – Select Live v2018.1". Below the logo, the text "Munis SaaS Dashboard" is visible. Underneath, user information is displayed: "User: 1446lout | Client: MU1446 | Name: Richland County School District 1, SC". The main content area is titled "Select an environment" and contains a table with two columns: "Name" and "Description". An arrow points from the callout box to the "Test v2018.1" link in the table. Below the table is a note: "Note: You must login to this page first. If you do not you will not be prompted to change your password. Direct shortcuts to a dashboard page will not allow users to change their password, or notify the user if the password has expired."

Name	Description
Test v2018.1	Test v2018.1 Database
Live v11.2	Live v11.2 Database
Train v11.2	Train v11.2 Database
IMPL - v11.2	IMPL v11.2 Database
Live v10.5	Live v10.5 Database
Training v10.5	Training v10.5 Database
Test v11.1	Test v11.1 Database

Note: You must login to this page first. If you do not you will not be prompted to change your password. Direct shortcuts to a dashboard page will not allow users to change their password, or notify the user if the password has expired.

Step 3:

Type in Credentials here (final time):



The image shows a sign-in form for Tyler Identity. At the top center is the Tyler Identity logo, which consists of a cluster of colored dots (blue, green, yellow) to the left of the text "tyler identity" in a blue sans-serif font, with "a total tyler solution" in a smaller font below it. Below the logo, the text "Sign in with your Tyler Account" is centered. There are two input fields: the first is labeled "Username *" and the second is labeled "Password". Below the password field is a checkbox labeled "Remember My Sign-in". At the bottom right of the form is a blue button with the text "SIGN IN" in white capital letters.

Step 4:

MUNIS Hub – Setting it up

The Tyler Hub (or MUNIS Dashboard) can be set up to make access to what you need easier. As we rollout this new version, we have set up a few default menus to start. To make these easier to apply, we have set them up in “bundles”.

Bundles set up


We currently have 3 bundles set up. It is important that you select the **one** set up with your access in mind to avoid getting insufficient access error message.

MGR Home Page– set up for school principals and department heads with items they most need.

MUNIS Home Page – set up for secretaries, bookkeepers, media specialists and assistants with items they most need.

Core Department Page – set up for the core department areas with items they most need. These core departments are Procurement, Warehouse, Budget, Human Resources, Payroll, Accounts Payable, Fixed Assets, General Ledger and other areas in Finance.

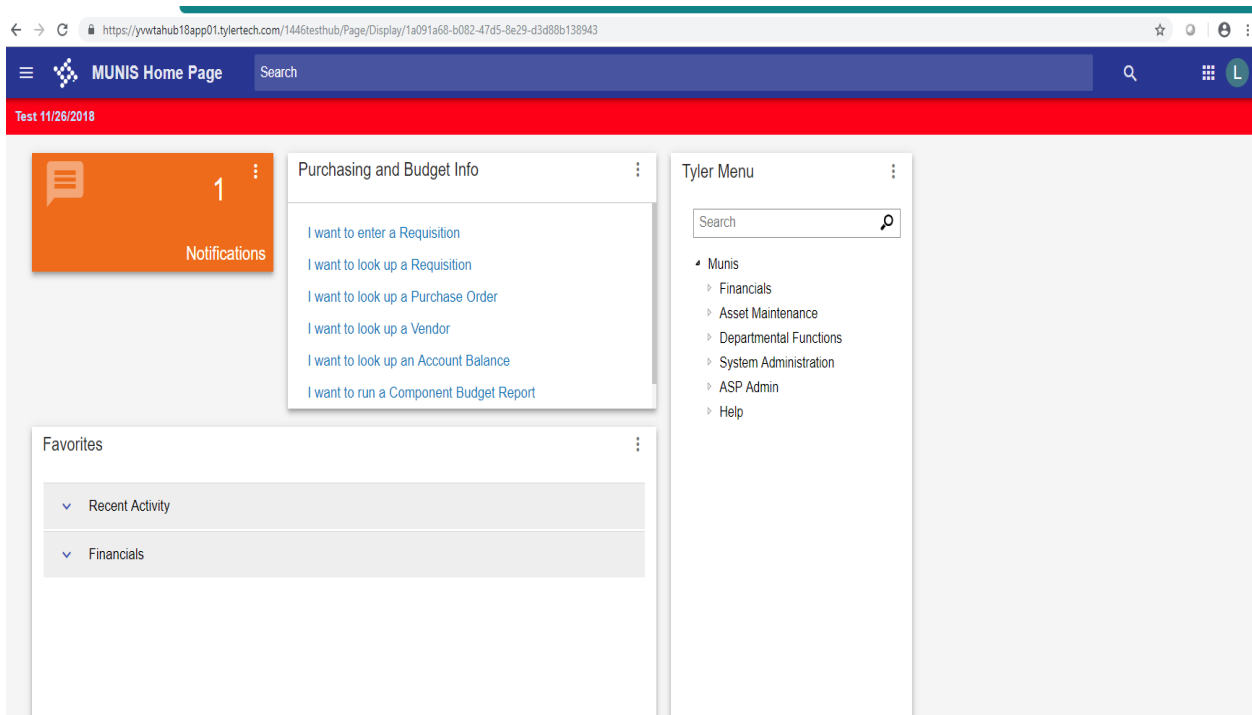
To apply bundles

1. Log in to MUNIS 2018.
2. Select the three lined icon () in the upper left area.
3. Select Content Library.
4. Select Content Bundles.
5. Click on the **one** that most applies to **your position**.
6. When it expands, select “**Apply Bundle**” and then close.
7. After your screen refreshes, the new settings will be applied.

The Next steps will provide instructions on how to locate and work in the Requisition screen

Using Munis

Using Munis provides details for standard Munis® screen, toolbar, and menu options. It also provides an overview of several features that enable you to efficiently manage information within Munis programs.



Requisitions

Objective

This document provides a description of the process used to request items using the Requisitions program.

Overview

The Requisitions program is intended as a replacement or alternative to the Requisition Entry program when using Munis Purchasing+.

Prerequisites

Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system.

Confirm the following:

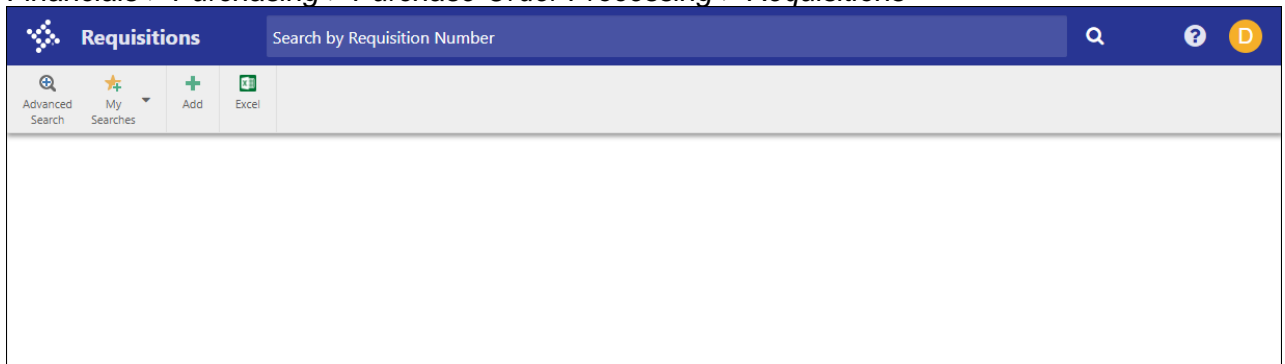
- One or more item records must exist in the Items program.

Procedure

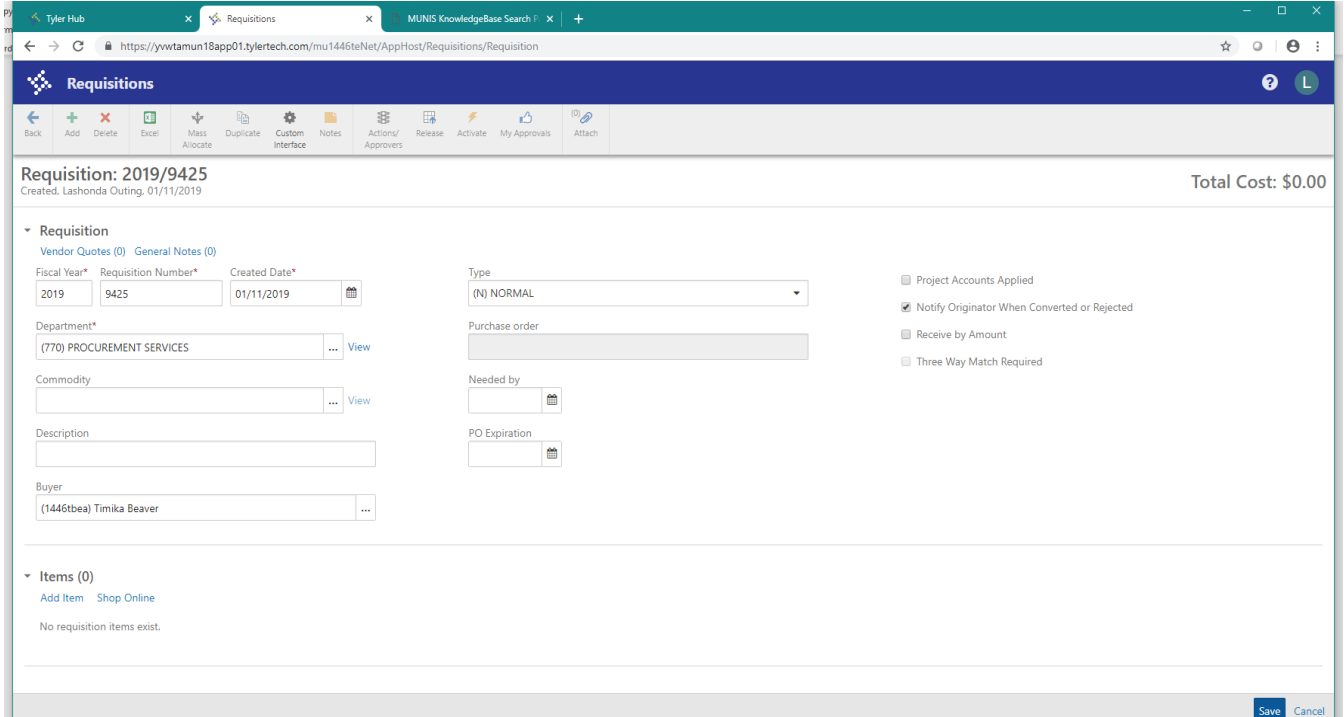
To enter an item request:

- Open the Requisitions program.

Financials > Purchasing > Purchase Order Processing > Requisitions



- On the toolbar, click Add.
 The program refreshes the screen to display the data fields.



- Complete the fields in the header section. Use the following table as a reference.

REQUIRED Fields	Description	Richland County School District One
Requisition	Provides the fiscal year and requisition number. The program automatically enters the default values based on the current fiscal year and next available requisition number. The requisition number is drawn from the Purchasing Settings program.	These fields will auto populate the next default requisition number.
Created Date	Contains the date the request was created.	This field will auto populate. *****DO NOT CHANGE *****
Department	Indicates the department making the request. The program enters the department from your user ID as the default value, but you can change it.	Field will default the end-users department code *****DO NOT CHANGE *****

REQUIRED Fields	Description	Richland County School District One
Commodity	Sets the commodity code for the requested items, if applicable.	*REQUIRED Select from list of 1 through 37
Description	Provides a general description of the request.	Information will auto-fill based on selection of commodity
Buyer	Defines the buyer for the request. Buyers are potentially notified at various points in the purchasing process based on your organization's settings.	The buyer is procurement specialist.
Type	Designates the type of requisition: <ul style="list-style-type: none"> • (B) Blanket—Indicates a purchase order that is intended to be used over a long period of time. • (N) Normal—Designates a purchase order for specific goods or services. Types are typically used for reporting and grouping purposes. Identifies the request type.	Choose from either: Blanket (Blanket PO's) or Normal (Line item PO's).
Purchase Order	Contains the purchase order number created when the request was converted. This box is not accessible, and will be blank until the request is successfully converted to a purchase order.	This field will auto populate with the PO number after the requisition is converted.
Needed By	Sets the date by which the request is needed.	Enter the need by date for delivery of product or services - CAN NOT BE TODAY'S DATE (MUST BE 10-30 DAYS ARO)
Project Accounts Applied	Indicates that project strings apply to the request. When you select the check box, the program makes the Project Strings fields available in the Items group.	This check box will be selected for capital project expenditures. This allows the user to allocate the item to the project expense string.
Notify Originator when Converted to PO/Rejected	Directs the program to send an email <u>to the employee who entered the request when it has been successfully converted to a purchase order.</u> If the Notify Originator When Requisition is Rejected or	Auto Checked, NO ACTION Required Default Setting based on the department code of the user.

REQUIRED Fields	Description	Richland County School District One
	Converted to a PO check box in Department Codes is selected, this option is selected as well, but you can change this.	
Receive by Amount	Select either AMOUNT	<p>Only check if this PO is a BPO -receive by "amount" for blanket purchase orders.</p> <p>For all other PO's item will be received by "Quantity".</p>
Three Way Match Required	<p>Indicates that a three-way match will be required for the purchase orders created from this request. The check box has no effect at the request level. It is intended as a method of speeding the data entry process, as the value of the check box is carried to the created purchase order when the request is converted.</p> <p>If you copy a request for which the check box is selected, the resulting copy also has the check box selected. Copying a request for which the check box is cleared causes the resulting copy to use the current default value of the Three-Way Match Status list in Accounts Payable Settings.</p>	<p>If your requisition has multiple fund code lines - *****DO NOT CHECK THIS BOX</p> <p>When in doubt, leave unchecked.</p> <p>This box will delay invoice payment processing.</p>
Notify Originator of Overages	Causes the program to notify the requester when the request has liquidations greater than the specified amount.	N/A

3. After completing the fields, click **Save** to save the requisition.
 The program saves your entries and examines the field values for errors. If the program encounters any errors, it displays the Errors button at the bottom of the screen.
4. If errors exist, click the Errors button to view a list of the errors that must be corrected before you continue.
5. Once all errors have been resolved, click Save again.

6. Munis accepts the requisition; however, line items and funds have not been specified for the requisition record.
7. To continue this process, click **Add Item** in the Items section.

Requisition: 2018/20100110
Created, Dan Olson, 02/16/2018

Total Cost: \$0.00

Item Details
[Add Item](#) [Delete Item](#) [Notes \(0\)](#) [Line 1 ▾](#)

Replenish Inventory

Item ... [View](#)

Contract ... [View](#)

Commodity ... [View](#)

Pick Ticket Purchase

Description*

Vendor ... [View](#) [+ New](#)

Ship to*
 ...

3202 EAST 42ND STREET
 FALMOUTH, ME 04105

E-mail

Quantity

Unit Price Unit of Measure

Discount Percent

Freight Amount

Credit Amount

Line Item Total

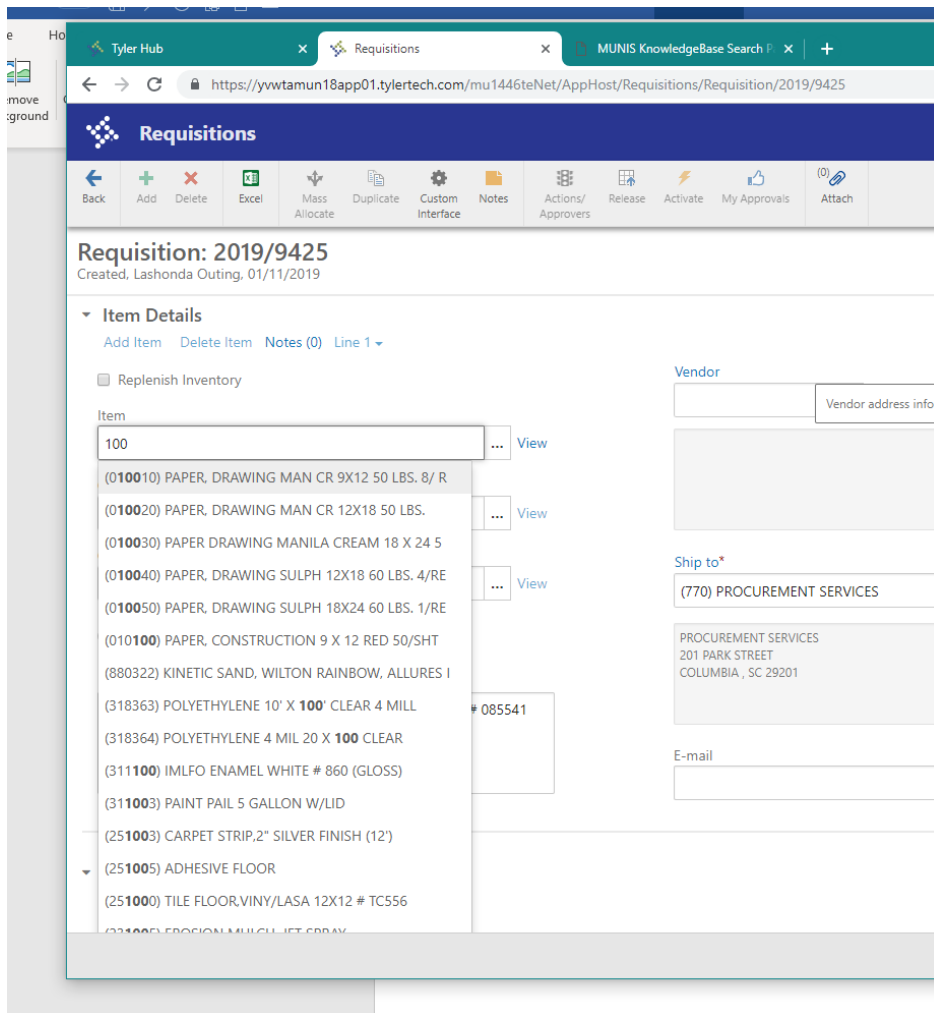
Allocations (0)
[Add Allocation](#) [Allocation Codes](#)
No allocations exist.

Optional Details

➤ **FOR WAREHOUSE INVENTORY ITEMS ONLY –**

Step 1: Begin by typing the Item number in the “ITEM” field

Step 2: **Select** and **Click** on the desired item.



The screenshot shows a web browser window with the URL <https://jywtamun18app01.tylertech.com/mu1446teNet/AppHost/Requisitions/Requisition/2019/9425>. The page title is "Requisitions" and the breadcrumb is "Requisition: 2019/9425". The page is created by Lashonda Outing on 01/11/2019.

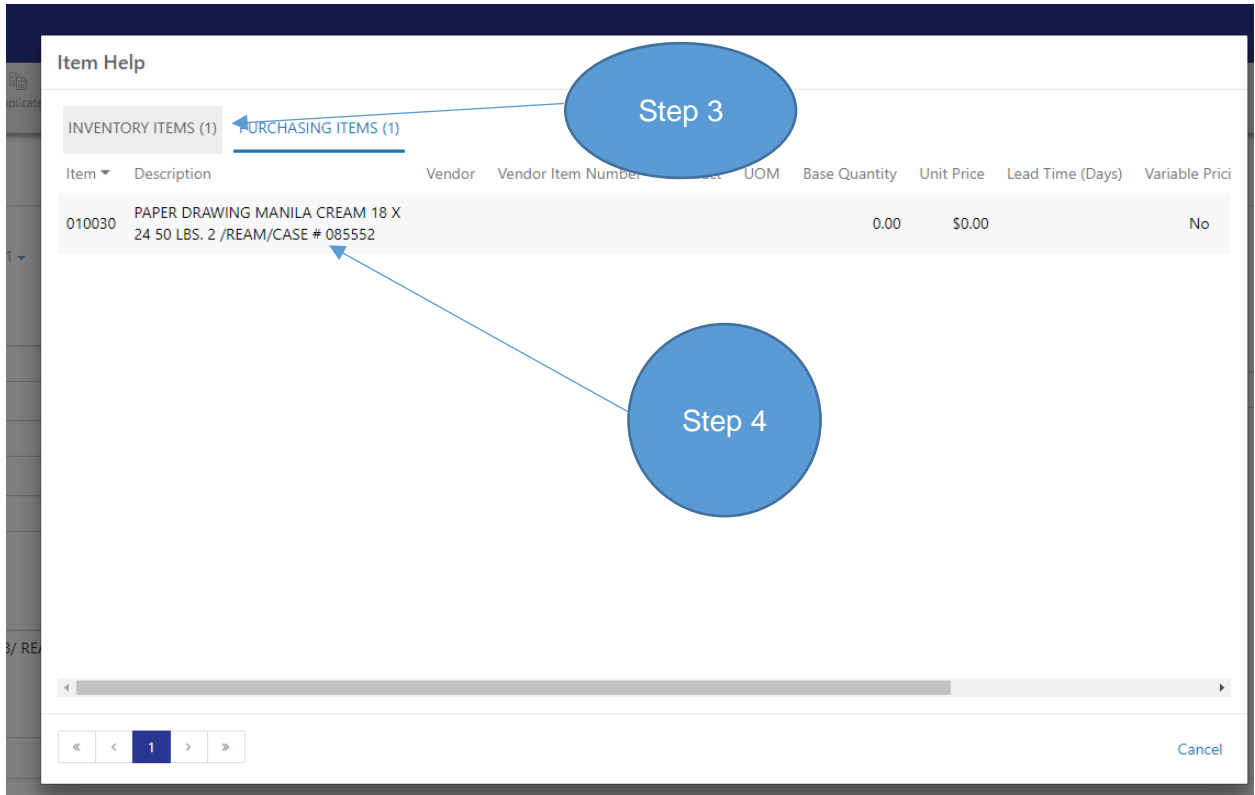
The "Item Details" section shows a dropdown menu for the "Item" field. The selected item is "100". The dropdown list contains the following items:

- (010010) PAPER, DRAWING MAN CR 9X12 50 LBS. 8/ R
- (010020) PAPER, DRAWING MAN CR 12X18 50 LBS.
- (010030) PAPER DRAWING MANILA CREAM 18 X 24 5
- (010040) PAPER, DRAWING SULPH 12X18 60 LBS. 4/RE
- (010050) PAPER, DRAWING SULPH 18X24 60 LBS. 1/RE
- (010100) PAPER, CONSTRUCTION 9 X 12 RED 50/SHT
- (880322) KINETIC SAND, WILTON RAINBOW, ALLURES I
- (318363) POLYETHYLENE 10' X 100' CLEAR 4 MILL
- (318364) POLYETHYLENE 4 MIL 20 X 100 CLEAR
- (311100) IMLFO ENAMEL WHITE # 860 (GLOSS)
- (311003) PAINT PAIL 5 GALLON W/LID
- (251003) CARPET STRIP,2" SILVER FINISH (12')
- (251005) ADHESIVE FLOOR
- (251000) TILE FLOOR,VINYL/LASA 12X12 # TC556
- (311000) EROSION MULCH,1FT,GRAY

The dropdown menu also shows a "View" button next to each item. The "Vendor" field is set to "(770) PROCUREMENT SERVICES" and the "Ship to" field is set to "PROCUREMENT SERVICES, 201 PARK STREET, COLUMBIA, SC 29201".

Step 3: **Click** the Words: **Inventory Items**

Step 4: **Click** on the **Description** of the Warehouse Item.



Step 5: Confirm that Pick Ticket is Selected before moving forward.

Step 6: Click “Ship to”

Step 7: Once the new screen loads, type in **REFERENCE** field to apply NAME to the order, then Click **OK**.

Ship To Details

<p>Ship to*</p> <input type="text" value="(770) PROCUREMENT SERVICES"/> ...	<p>Bill to</p> <input type="text" value="(750B) RICHLAND COUNTY SCH DIST ONE"/>
<p>PROCUREMENT SERVICES 201 PARK STREET COLUMBIA, SC 29201</p>	<p>RICHLAND COUNTY SCH DIST ONE ACCOUNTS PAYABLE P.O. BOX 11615 COLUMBIA, SC 29211</p>
<p>Ship to E-mail</p> <input type="text"/>	<p>Bill to E-mail</p> <input type="text"/>
<p>Reference</p> <input type="text"/>	
<p>Special Handling</p> <input type="text" value="(N) NONE"/>	

- After you have completed the fields for the item, click Add Item again to create a new item, if applicable.
The program adds another item line, and clears the fields.
- Complete the fields for the second item.
You can view any item line by clicking on it in the item list.
- When you have finished adding item lines, click Save.
- If your organization uses workflow, click Release on the toolbar to submit the request. Item requests are controlled by the Requisition Approvals (REQ) business rule.
If your organization does not use workflow, clicking Release immediately approves the request.

Results

You have created an item request record.

What's Next?

After item requests are approved, they can be converted into purchase orders using the Requisition Conversions program.

If the Allow Auto Posting of Purchase Orders check box is selected in Purchase Order Settings, the Request for Item program automatically approves released requests that are to be converted to purchase orders.

Requisition Approval

Objective

This document provides instruction for approving released requisitions. It is intended for personnel responsible for approving requisitions.

Overview

The Approvals card, in conjunction with the Workflow business rules, establishes an electronic approval process for requisitions. When a requisition is released in Munis, the requisition is submitted to an approval process. The requisition must be approved by all necessary approvers in order for it to be converted into a purchase order or contract. This document describes the approval process using the Approvals card.

Prerequisites

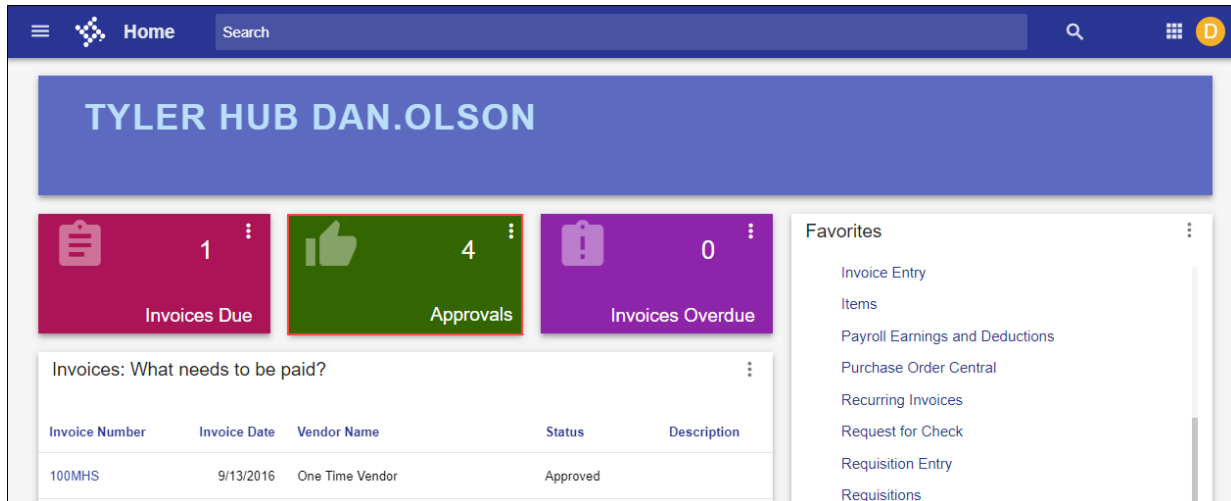
Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system.

Confirm the following:

- Requisitions have been completed and released.
- Workflow business rules are established.
- You are included in the Workflow User Attributes program as an approver.
- You have access to the Approvals card on Tyler Hub.

Procedure

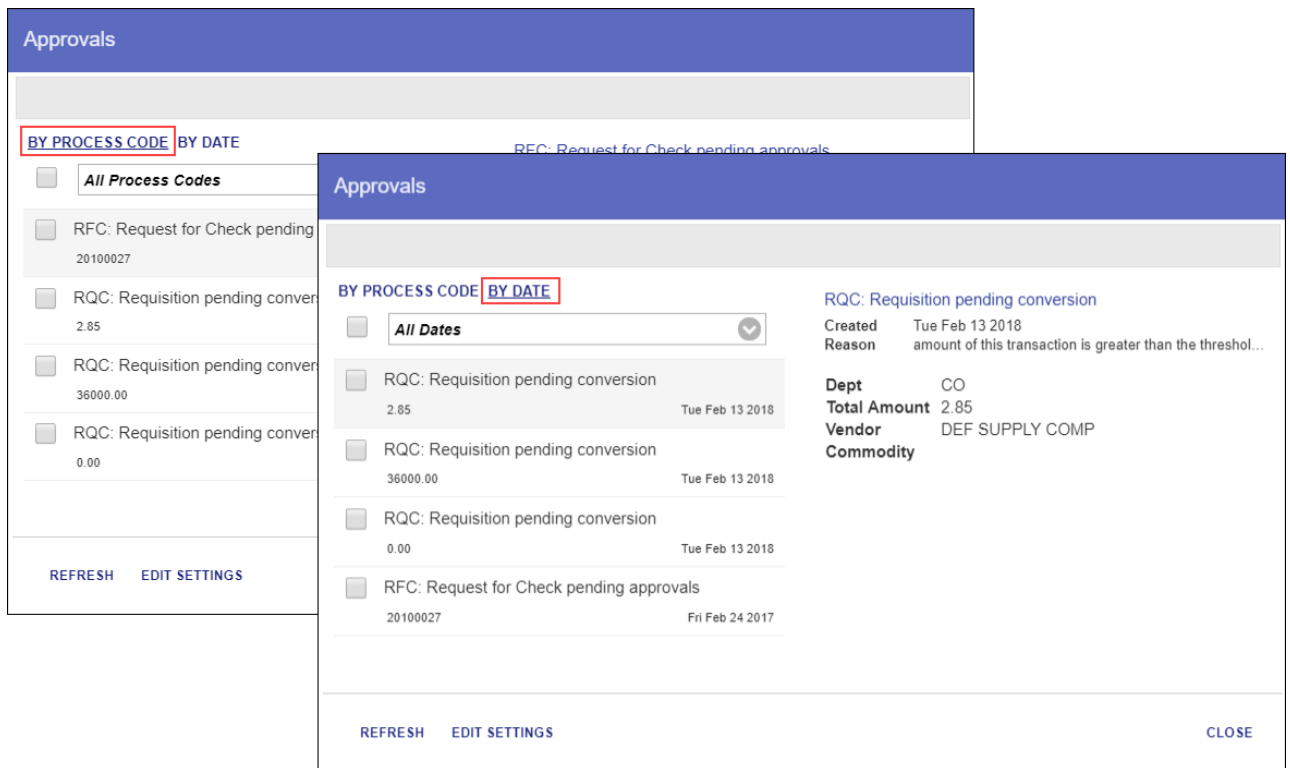
Munis Workflow transactions are approved using the Approvals card on Tyler Hub.



The screenshot shows the Tyler Hub dashboard for user DAN.OLSON. At the top, there are navigation icons and a search bar. Below the user name, there are three main cards: 'Invoices Due' with a count of 1, 'Approvals' with a count of 4 (highlighted with a red border), and 'Invoices Overdue' with a count of 0. To the right is a 'Favorites' list. Below the cards is a table titled 'Invoices: What needs to be paid?' with columns for Invoice Number, Invoice Date, Vendor Name, Status, and Description. A single row is visible with the following data: 100MHS, 9/13/2016, One Time Vendor, Approved.

To approve an item:

1. Double-click the Approvals card to list all items currently awaiting approval. Use the By Date or By Process Code options to sort the items.



The first screenshot shows the 'Approvals' modal window with the 'BY PROCESS CODE' option selected and highlighted with a red box. The second screenshot shows the same modal window with the 'BY DATE' option selected and highlighted with a red box. The modal displays a list of items with checkboxes, process codes, amounts, and dates. A detailed view of one item is shown on the right side of the second screenshot.

Process Code	Amount	Date
<input type="checkbox"/> RFC: Request for Check pending approvals 20100027		Fri Feb 24 2017
<input type="checkbox"/> RQC: Requisition pending conversion 2.85	2.85	Tue Feb 13 2018
<input type="checkbox"/> RQC: Requisition pending conversion 36000.00	36000.00	Tue Feb 13 2018
<input type="checkbox"/> RQC: Requisition pending conversion 0.00	0.00	Tue Feb 13 2018

Item Details:
 RQC: Requisition pending conversion
 Created: Tue Feb 13 2018
 Reason: amount of this transaction is greater than the threshol...
 Dept: CO
 Total Amount: 2.85
 Vendor: DEF SUPPLY COMP
 Commodity:

2. Review the items awaiting approval.

- To view additional information, click the Detail link to view the item in the applicable Munis program.

Approvals

BY PROCESS CODE BY DATE

All Dates

RQC: Requisition pending conversion
2.85 Tue Feb 13 2018

RQC: Requisition pending conversion
36000.00 Tue Feb 13 2018

RQC: Requisition pending conversion
0.00 Tue Feb 13 2018

RFC: Request for Check pending approvals
20100027 Fri Feb 24 2017

REFRESH EDIT SETTINGS

RQC: Requisition pending conversion

Created Reason: Tue Feb 13 2018
amount of this transaction is greater than the threshol...

Dept Total An Vendor Commo

Requisitions

Requisition: 2017/20100109
Allocated, Dan Olson, 02/13/2018

Total Cost: \$2.85

Requisition

Fiscal Year: 2017 Requisition Number: 20100109 Created Date: 02/13/2016 Type: (N) NORMAL Convert to: Purchase Order

Department: (CO) CENTRAL OFFICE

Commodity:

Description: Copper wire

Buyer: (grant.jewett) Grant Jewett

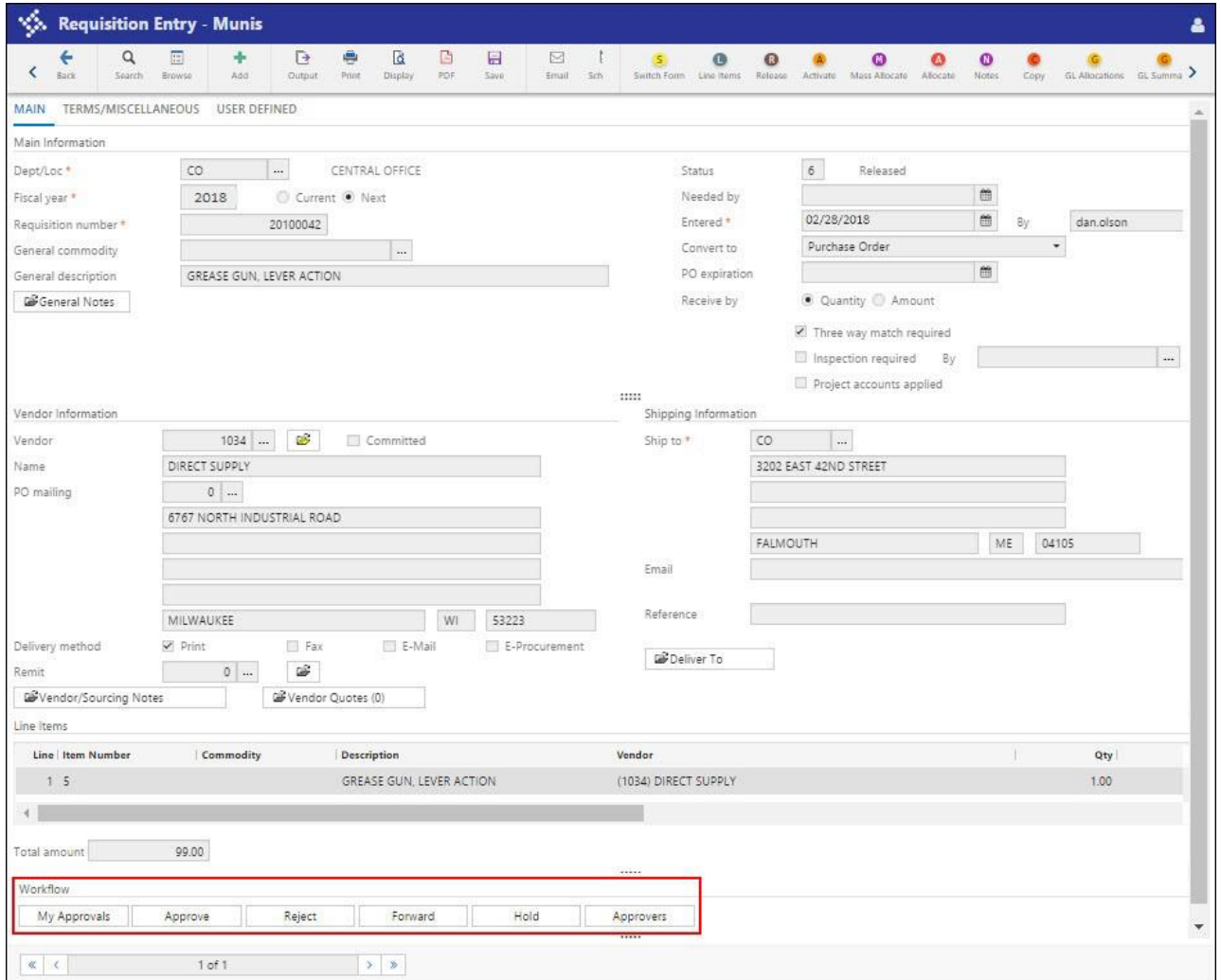
Notification Threshold %: 0.00

Items (1)

Delete	Line	Description	Qty	UOM	Unit Price	Line Total	GL Account	Bid Item
X	1	Copper wire, 3AWG, THHN, Stranded copper, 600V, BI	6.00	FEET	\$0.50000	\$2.85	E () TECHNOLOGY HARDWARE	<input type="checkbox"/>

Save Cancel

- To approve the item from the Munis program, use the options in the **Workflow group at the bottom of the screen.**



Requisition Entry - Munis

MAIN TERMS/MISCELLANEOUS USER DEFINED

Main Information

Dept/Loc * CO ... CENTRAL OFFICE

Fiscal year * 2018 Current Next

Requisition number * 20100042

General commodity

General description GREASE GUN, LEVER ACTION

General Notes

Status 6 Released

Needed by

Entered * 02/28/2018 By dan.olson

Convert to Purchase Order

PO expiration

Receive by Quantity Amount

Three way match required

Inspection required By

Project accounts applied

Vendor Information

Vendor 1034 ... Committed

Name DIRECT SUPPLY

PO mailing 0 ...

6767 NORTH INDUSTRIAL ROAD

MILWAUKEE WI 53223

Delivery method Print Fax E-Mail E-Procurement

Remit 0 ...

Vendor/Sourcing Notes Vendor Quotes (0)

Shipping Information

Ship to * CO ...

3202 EAST 42ND STREET

FALMOUTH ME 04105

Email

Reference

Deliver To

Line Items

Line	Item Number	Commodity	Description	Vendor	Qty
1	5		GREASE GUN, LEVER ACTION	(1034) DIRECT SUPPLY	1.00

Total amount 99.00

Workflow

My Approvals Approve Reject Forward Hold Approvers

1 of 1

- To approve the item from the Approvals card, select the item to display the Workflow options, and then select the appropriate action.

Approvals

BY PROCESS CODE [BY DATE](#)

All Dates ▼

RQC: Requisition pending conversion
2.85 Tue Feb 13 2018

RQC: Requisition pending conversion
36000.00 Tue Feb 13 2018

RQC: Requisition pending conversion
0.00 Tue Feb 13 2018

RFC: Request for Check pending approvals
20100027 Fri Feb 24 2017

RQC: Requisition pending conversion

Created Tue Feb 13 2018
Reason amount of this transaction is greater than the threshol...

Dept PR
Total Amount 36000.00
Vendor JOHN DEERE
Commodity

REFRESH EDIT SETTINGS

APPROVE
REJECT
HOLD
FORWARD
CLOSE

When you select Accept, Reject, Forward, or Hold, the Approvals card provides an Optional Comment (Accept) or Required Comment (Reject, Forward, or Hold) box. For required comments, enter the reason for the action.

Button	Description
Approve	Identifies the record as approved, and sends notification to the next approver in sequence.
Reject	Rejects the item. You must enter a rejection reason. The program notifies the originator of the rejection and reason. The originator determines the next course of action (alteration and resubmission or deletion).
Forward	Allows you to choose another Munis user to review this pending record. If you are approving an item that has been forwarded to you, the Forward option is not available.
Hold	Retains an item in your approval queue for additional review. It will remain here until further action is taken.
Convert	When you are the final approver for a requisition and you have the appropriate permissions, the Convert option allows you to convert the requisition to a purchase order or contract.

Results

Depending on the action selected for each record, the status results differ.

Status Change

The status of rejected requisitions is changed from 6–Released to 1–Rejected. The status of approved requisitions remain at 6–Released until the approval of the final step in the approval process. At that time, the status changes to 8–Approved.

GL Impact

There is no impact on the general ledger accounts at this time.

What's Next?

Requisitions with a status of 8–Approved are eligible for conversion to purchase orders. Rejected requisitions may be corrected by the originators and resubmitted to the approval process.

Purchase Order Receiving

Objective

This document provides instructions on how to record the receipt of items using the Munis Purchase Order Receiving program.

Overview

The purpose of creating a receiving record is to document that goods that have been ordered have been received before invoices are paid. Entering these records allows Accounts Payable personnel to match the purchase order, purchase order receiving record, and the accounts payable invoice to ensure that all pieces match prior to payment to the vendor. You may receive each item individually or you may receive all items at one time.

Prerequisites

Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system.

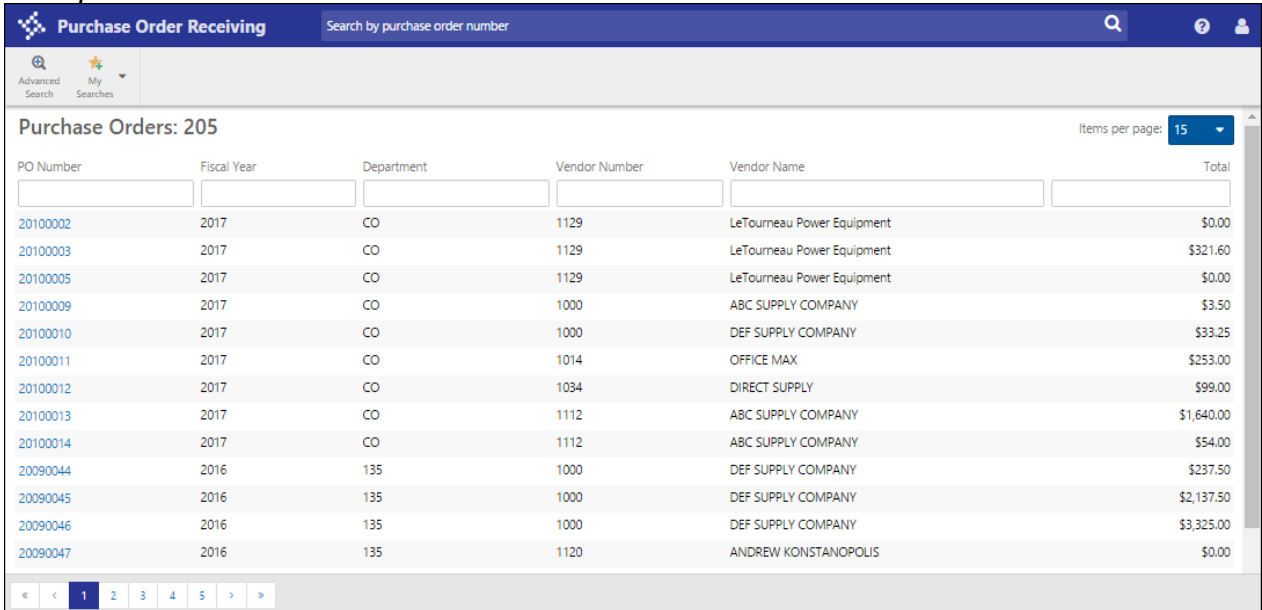
Confirm the following:

- You have permission to receive purchase orders for the department.
- Open purchase orders exist.
- Ordered goods have been received from the vendor.

Procedures

To enter a receipt for all items on a purchase order:

1. Navigate to the Purchase Order Quick Receipt program.
Munis > Financials > Purchasing > Purchase Order Processing > Purchase Order Quick Receipt



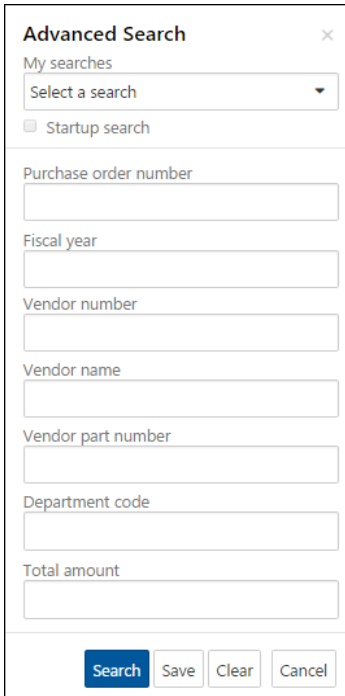
Purchase Order Receiving Search by purchase order number

Advanced Search My Searches

Purchase Orders: 205 Items per page: 15

PO Number	Fiscal Year	Department	Vendor Number	Vendor Name	Total
20100002	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100003	2017	CO	1129	LeTourneau Power Equipment	\$321.60
20100005	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100009	2017	CO	1000	ABC SUPPLY COMPANY	\$3.50
20100010	2017	CO	1000	DEF SUPPLY COMPANY	\$33.25
20100011	2017	CO	1014	OFFICE MAX	\$253.00
20100012	2017	CO	1034	DIRECT SUPPLY	\$99.00
20100013	2017	CO	1112	ABC SUPPLY COMPANY	\$1,640.00
20100014	2017	CO	1112	ABC SUPPLY COMPANY	\$54.00
20090044	2016	135	1000	DEF SUPPLY COMPANY	\$237.50
20090045	2016	135	1000	DEF SUPPLY COMPANY	\$2,137.50
20090046	2016	135	1000	DEF SUPPLY COMPANY	\$3,325.00
20090047	2016	135	1120	ANDREW KONSTANOPOLIS	\$0.00

2. Use the Advanced Search feature to find the purchase order for which to receive items.



Advanced Search ×

My searches
Select a search

Startup search

Purchase order number

Fiscal year

Vendor number

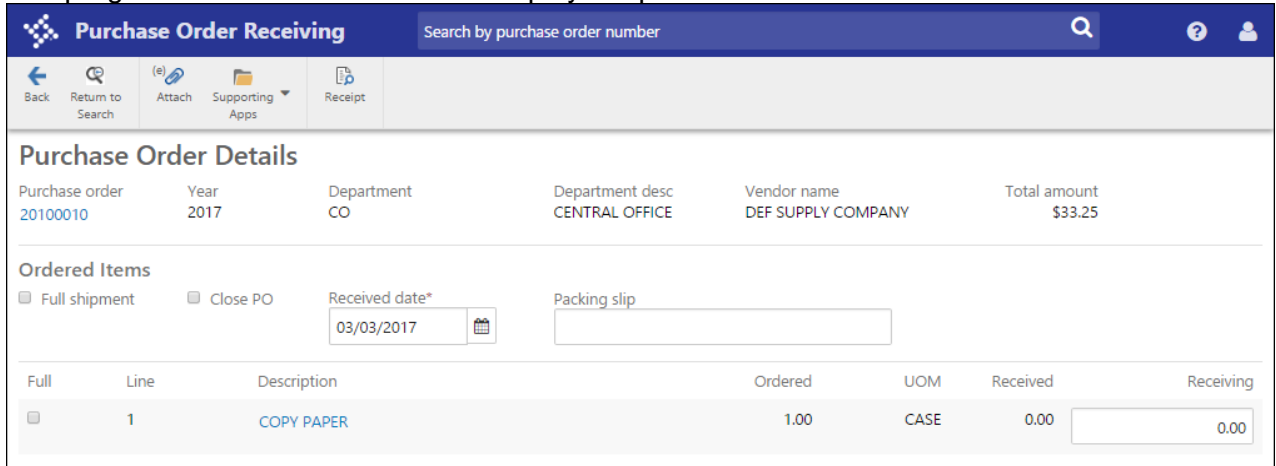
Vendor name

Vendor part number

Department code

Total amount

- Click the link in the PO Number column.
 The program refreshes the screen to display the purchase order information.



Purchase Order Receiving Search by purchase order number

Back Return to Search Attach Supporting Apps Receipt

Purchase Order Details

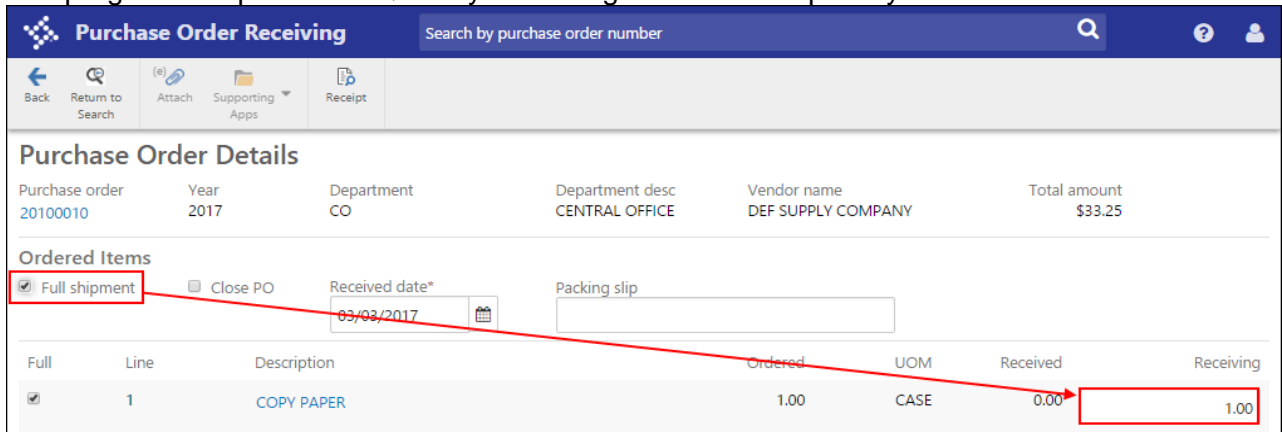
Purchase order	Year	Department	Department desc	Vendor name	Total amount
20100010	2017	CO	CENTRAL OFFICE	DEF SUPPLY COMPANY	\$33.25

Ordered Items

Full shipment Close PO Received date* 03/03/2017 Packing slip

Full	Line	Description	Ordered	UOM	Received	Receiving
<input type="checkbox"/>	1	COPY PAPER	1.00	CASE	0.00	<input type="text" value="0.00"/>

- Select the Full Shipment check box in the Ordered Items group.
 The program completes the Quantity Receiving field with the quantity to receive.



Purchase Order Receiving Search by purchase order number

Back Return to Search Attach Supporting Apps Receipt

Purchase Order Details

Purchase order	Year	Department	Department desc	Vendor name	Total amount
20100010	2017	CO	CENTRAL OFFICE	DEF SUPPLY COMPANY	\$33.25

Ordered Items

Full shipment Close PO Received date* 03/03/2017 Packing slip

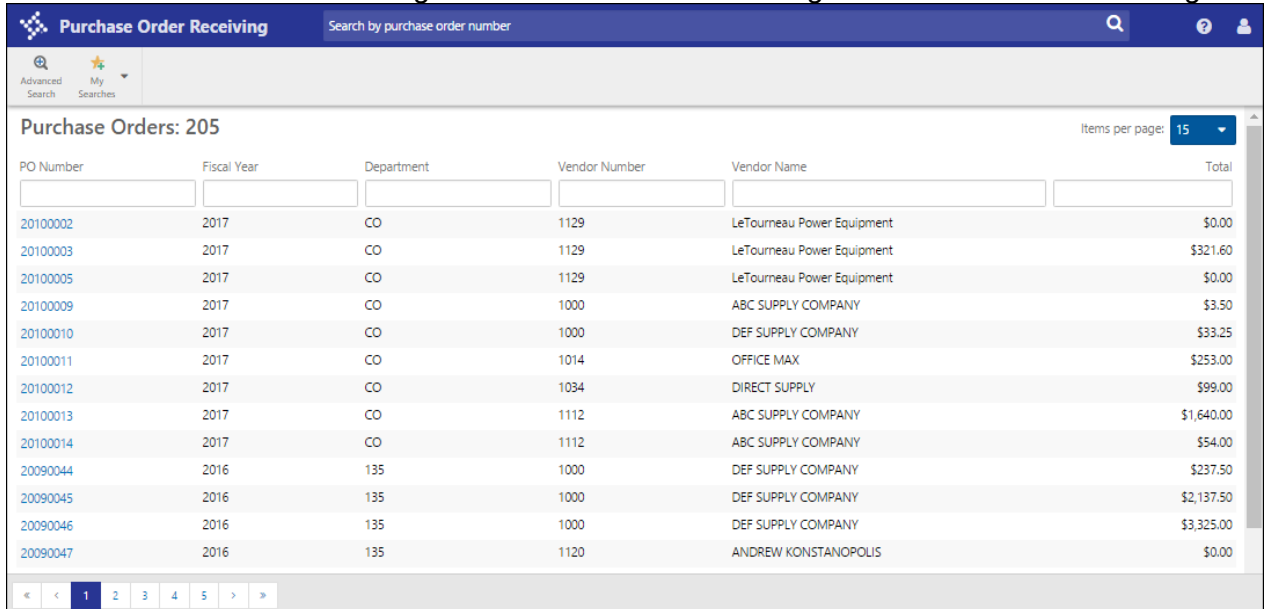
Full	Line	Description	Ordered	UOM	Received	Receiving
<input checked="" type="checkbox"/>	1	COPY PAPER	1.00	CASE	0.00	<input type="text" value="1.00"/>

- If the purchase order should be closed after the receipt is completed, select the Close PO check box.
- Update the Received Date for the shipment. The default value is the current date.
- Enter a packing slip number, if applicable.
- Click Save.
 The program saves the entries and displays a confirmation message.
- Click OK.
 The program updates the Total Received column.
 For inventory items, the program displays the Inventory Transactions > Receipts program.
- Enter an expiration date, if applicable, and then click Save.

To enter a receipt of a partial shipment:

11. Navigate to the Purchase Order Receiving program.

Munis > Financials > Purchasing > Purchase Order Processing > Purchase Order Receiving



Purchase Order Receiving Search by purchase order number

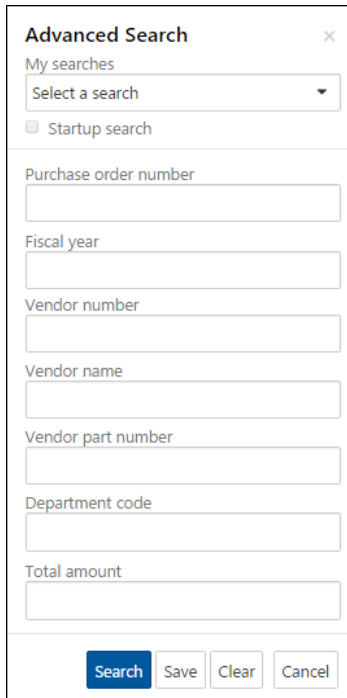
Advanced Search My Searches

Purchase Orders: 205 Items per page: 15

PO Number	Fiscal Year	Department	Vendor Number	Vendor Name	Total
20100002	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100003	2017	CO	1129	LeTourneau Power Equipment	\$321.60
20100005	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100009	2017	CO	1000	ABC SUPPLY COMPANY	\$3.50
20100010	2017	CO	1000	DEF SUPPLY COMPANY	\$33.25
20100011	2017	CO	1014	OFFICE MAX	\$253.00
20100012	2017	CO	1034	DIRECT SUPPLY	\$99.00
20100013	2017	CO	1112	ABC SUPPLY COMPANY	\$1,640.00
20100014	2017	CO	1112	ABC SUPPLY COMPANY	\$54.00
20090044	2016	135	1000	DEF SUPPLY COMPANY	\$237.50
20090045	2016	135	1000	DEF SUPPLY COMPANY	\$2,137.50
20090046	2016	135	1000	DEF SUPPLY COMPANY	\$3,325.00
20090047	2016	135	1120	ANDREW KONSTANOPOLIS	\$0.00

12. Click Advanced Search on the toolbar.

13. Use the Advanced Search feature to find the purchase order for which to receive items.



Advanced Search [X]

My searches
Select a search [v]

Startup search

Purchase order number
[]

Fiscal year
[]

Vendor number
[]

Vendor name
[]

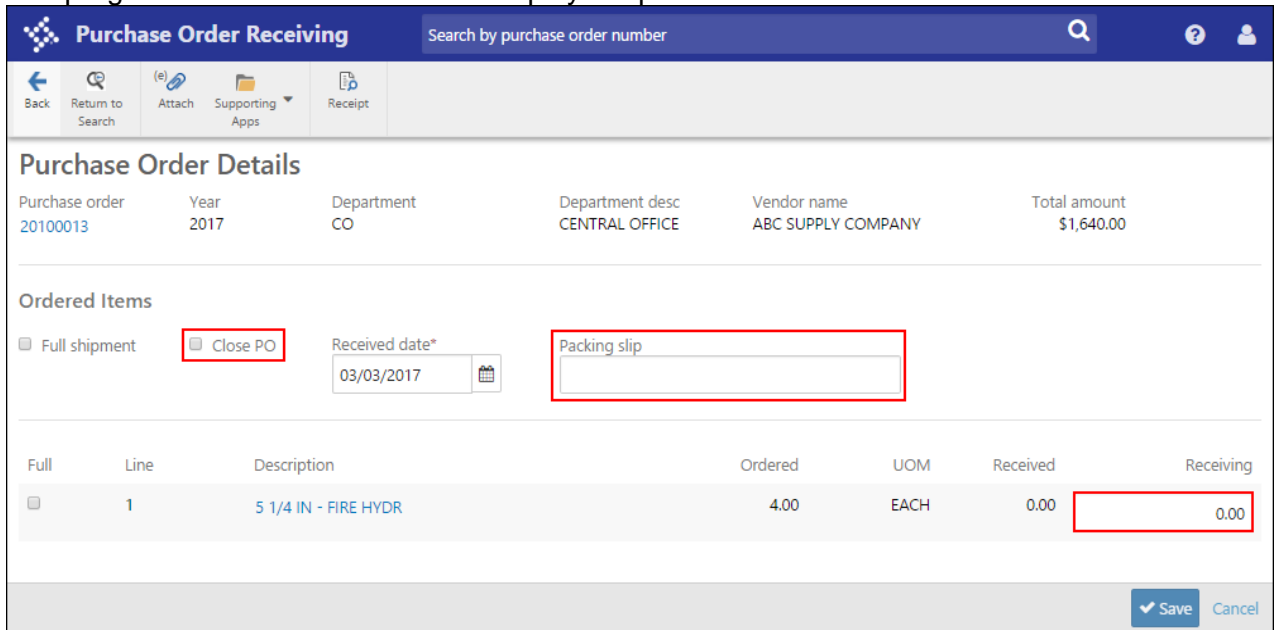
Vendor part number
[]

Department code
[]

Total amount
[]

[Search] [Save] [Clear] [Cancel]

- Click the link in the PO Number column.
 The program refreshes the screen to display the purchase order information.



Purchase Order Receiving Search by purchase order number

Back Return to Search Attach Supporting Apps Receipt

Purchase Order Details

Purchase order	Year	Department	Department desc	Vendor name	Total amount
20100013	2017	CO	CENTRAL OFFICE	ABC SUPPLY COMPANY	\$1,640.00

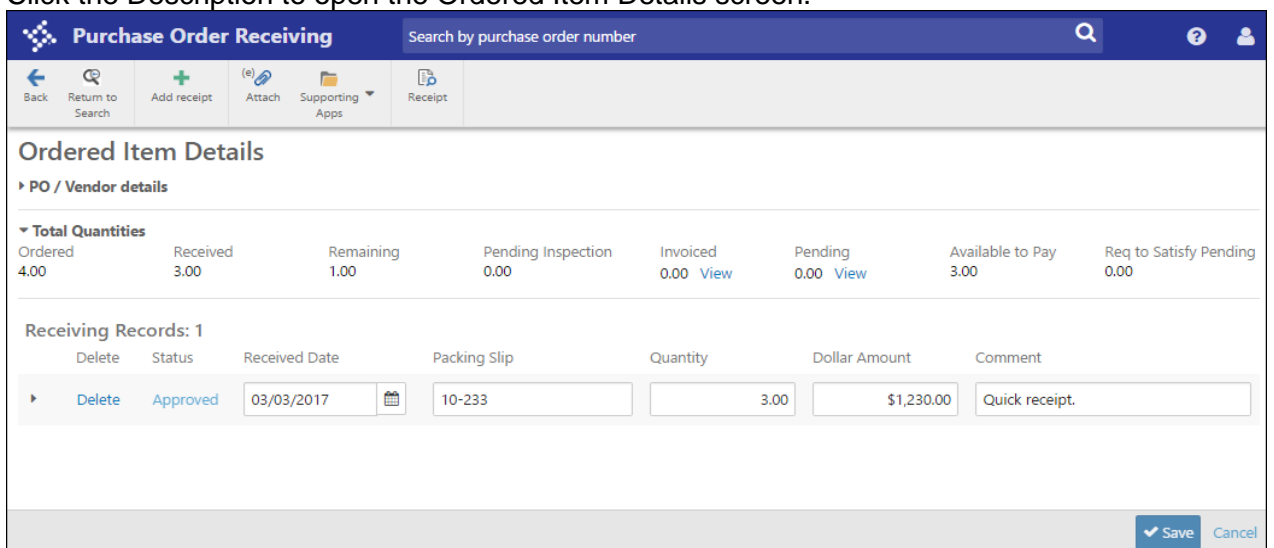
Ordered Items

Full shipment
 Close PO
 Received date*

Full	Line	Description	Ordered	UOM	Received	Receiving
<input type="checkbox"/>	1	5 1/4 IN - FIRE HYDR	4.00	EACH	0.00	<input type="text" value="0.00"/>

Save Cancel

- If the purchase order should be closed after completing the receipt, select the Close PO check box.
- The program automatically enters today's date in the Received Date field, but you can change this.
- Enter a packing slip number that applies to the receiving record.
- In the Receiving box, enter the number of items to receive.
- Click Save to save the receiving record.
- Click the Description to open the Ordered Item Details screen.



Purchase Order Receiving Search by purchase order number

Back Return to Search Add receipt Attach Supporting Apps Receipt

Ordered Item Details

PO / Vendor details

Total Quantities

Ordered	Received	Remaining	Pending Inspection	Invoiced	Pending	Available to Pay	Req to Satisfy Pending
4.00	3.00	1.00	0.00	0.00 View	0.00 View	3.00	0.00

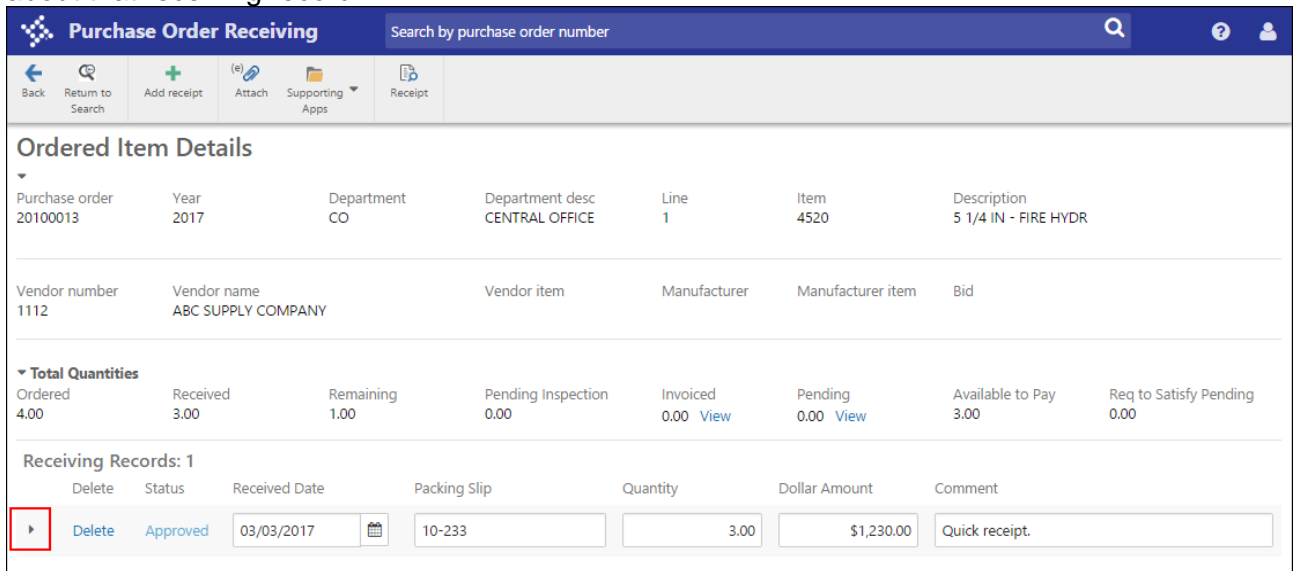
Receiving Records: 1

Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
Delete	Approved	<input type="text" value="03/03/2017"/>	<input type="text" value="10-233"/>	<input type="text" value="3.00"/>	<input type="text" value="\$1,230.00"/>	<input type="text" value="Quick receipt."/>

Save Cancel

- The PO/Vendor Details section is hidden by default. Click the arrow to show it.

22. On the Ordered Item Details screen you can update the Dollar Amount box if the dollar amount of the received items differs from the default value.
23. In the Receiving Records section, click the arrow for an individual row to view full details about that receiving record.



Purchase Order Receiving Search by purchase order number

Back Return to Search Add receipt Attach Supporting Apps Receipt

Ordered Item Details

Purchase order	Year	Department	Department desc	Line	Item	Description
20100013	2017	CO	CENTRAL OFFICE	1	4520	5 1/4 IN - FIRE HYDR

Vendor number	Vendor name	Vendor item	Manufacturer	Manufacturer item	Bid
1112	ABC SUPPLY COMPANY				

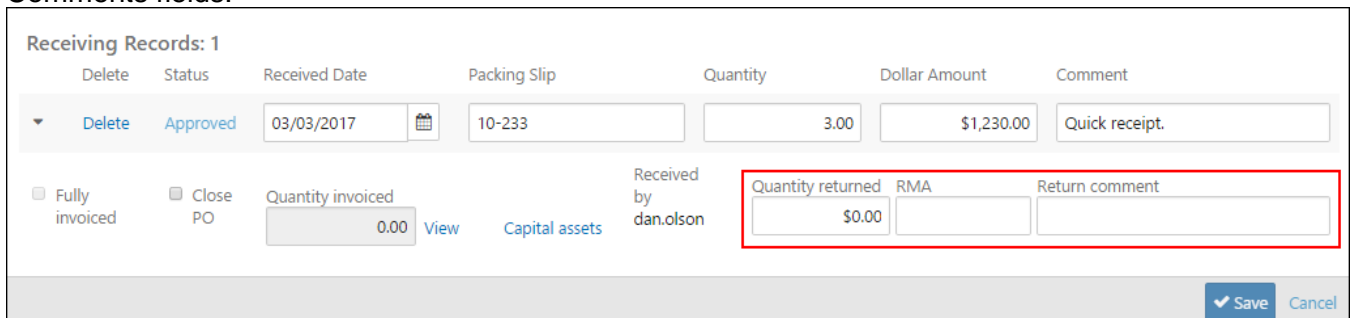
Total Quantities

Ordered	Received	Remaining	Pending Inspection	Invoiced	Pending	Available to Pay	Req to Satisfy Pending
4.00	3.00	1.00	0.00	0.00 View	0.00 View	3.00	0.00

Receiving Records: 1

Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
<input type="button" value="Delete"/>	Approved	03/03/2017	10-233	3.00	\$1,230.00	Quick receipt.

24. If items from this shipment are or have been returned to the vendor, you can enter the quantity of returned items and a comment regarding the return in the Quantity and Comments fields.



Receiving Records: 1

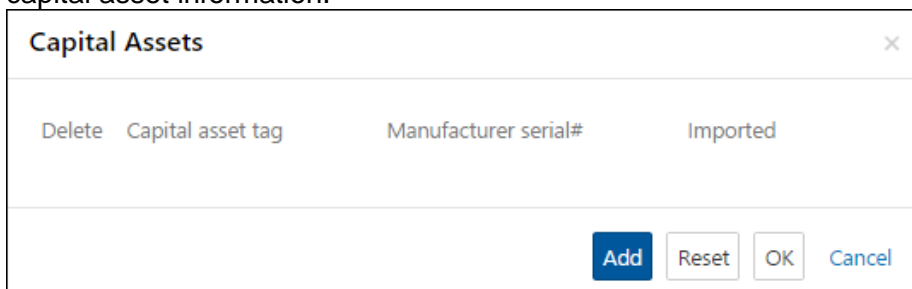
Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
<input type="button" value="Delete"/>	Approved	03/03/2017	10-233	3.00	\$1,230.00	Quick receipt.

Fully invoiced
 Close PO
 Quantity invoiced: 0.00 [View](#)
 Capital assets
 Received by: dan.olson

Quantity returned	RMA	Return comment
\$0.00		

[Save](#) [Cancel](#)

25. If the receiving record is for a capital asset, click the Capital Assets link to view or modify the capital asset information.

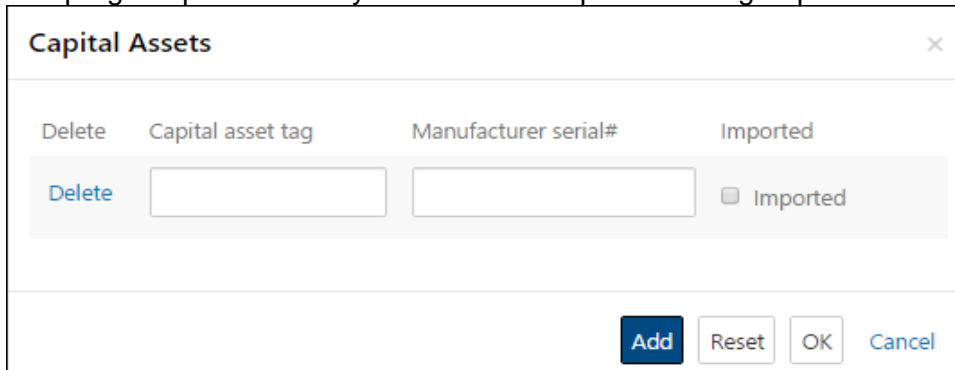


Capital Assets [X]

Delete	Capital asset tag	Manufacturer serial#	Imported

[Add](#) [Reset](#) [OK](#) [Cancel](#)

26. Click Add to create a new capital asset from the received items.
The program provides entry fields for the Capital Assets group.



The screenshot shows a web form titled "Capital Assets" with a close button (X) in the top right corner. The form contains a table with the following columns: "Delete", "Capital asset tag", "Manufacturer serial#", and "Imported". Below the column headers, there is a row of input fields: a "Delete" button, an empty text box for "Capital asset tag", an empty text box for "Manufacturer serial#", and a checkbox labeled "Imported". At the bottom right of the form, there is a toolbar with four buttons: "Add" (dark blue), "Reset" (light blue), "OK" (light blue), and "Cancel" (light blue).

27. Enter an asset tag number and a manufacturer serial number for the item.
28. If the asset record is imported from outside of Munis, select the Imported check box.
29. Click Save.
The program saves your entries. If you entered a capital asset as part of the receiving record, the Inventory Receiving program opens to allow you to complete the inventory receipt.

Use the toolbar options on the Order Item Detail screen to:

- Add additional purchase order receiving lines.
- Add or view attachments to the receiving record.
- View receipt audit information.

Returning Items After Entering a Receiving Record

Objective

This document provides instruction on returning received items using the Purchase Order Receiving program.

Overview

The Munis Purchase Order Receiving program allows you to indicate if a portion of items being received are being returned due to damage or any other issues with the shipment.

Prerequisites

Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system.

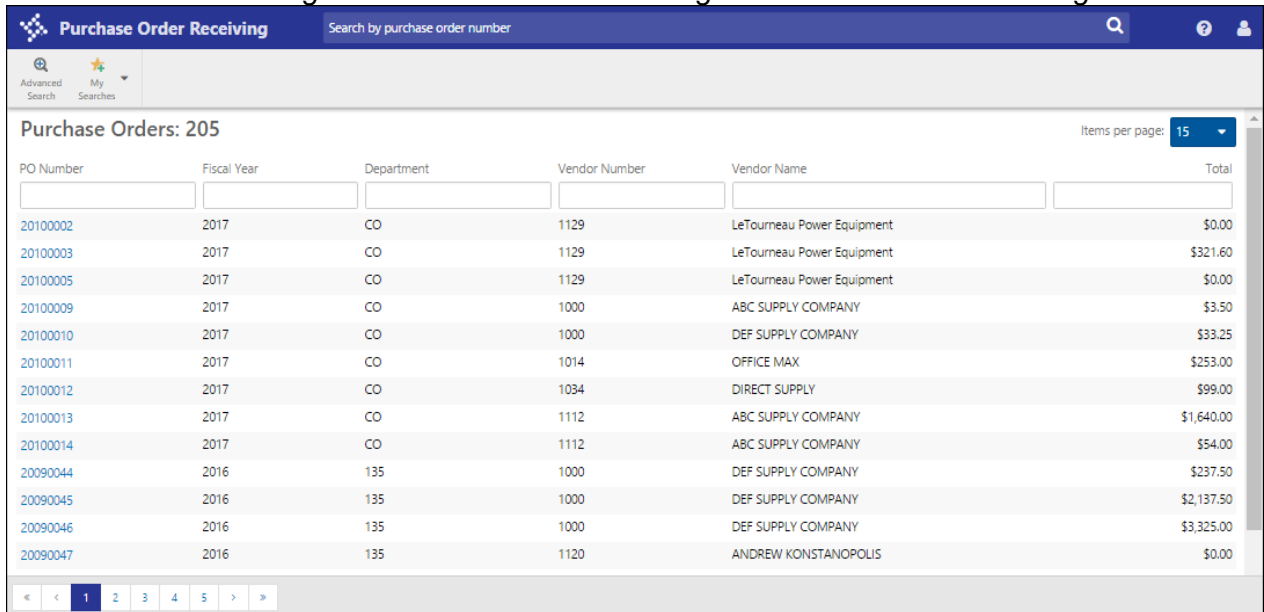
Confirm the following:

- You have permissions to maintain PO receipts.

Procedure

Complete the following steps to enter returned items:

- Open the Munis Purchase Order Receiving program.
Financials > Purchasing > Purchase Order Processing > Purchase Order Receiving



Purchase Order Receiving Search by purchase order number

Advanced Search My Searches

Purchase Orders: 205 Items per page: 15

PO Number	Fiscal Year	Department	Vendor Number	Vendor Name	Total
20100002	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100003	2017	CO	1129	LeTourneau Power Equipment	\$321.60
20100005	2017	CO	1129	LeTourneau Power Equipment	\$0.00
20100009	2017	CO	1000	ABC SUPPLY COMPANY	\$3.50
20100010	2017	CO	1000	DEF SUPPLY COMPANY	\$33.25
20100011	2017	CO	1014	OFFICE MAX	\$253.00
20100012	2017	CO	1034	DIRECT SUPPLY	\$99.00
20100013	2017	CO	1112	ABC SUPPLY COMPANY	\$1,640.00
20100014	2017	CO	1112	ABC SUPPLY COMPANY	\$54.00
20090044	2016	135	1000	DEF SUPPLY COMPANY	\$237.50
20090045	2016	135	1000	DEF SUPPLY COMPANY	\$2,137.50
20090046	2016	135	1000	DEF SUPPLY COMPANY	\$3,325.00
20090047	2016	135	1120	ANDREW KONSTANOPOLIS	\$0.00

- Click Advanced Search on the toolbar.
- Use the Advanced Search feature to find the purchase order for which to receive items.

Advanced Search ×

My searches
 Select a search ▼

Startup search

Purchase order number

Fiscal year

Vendor number

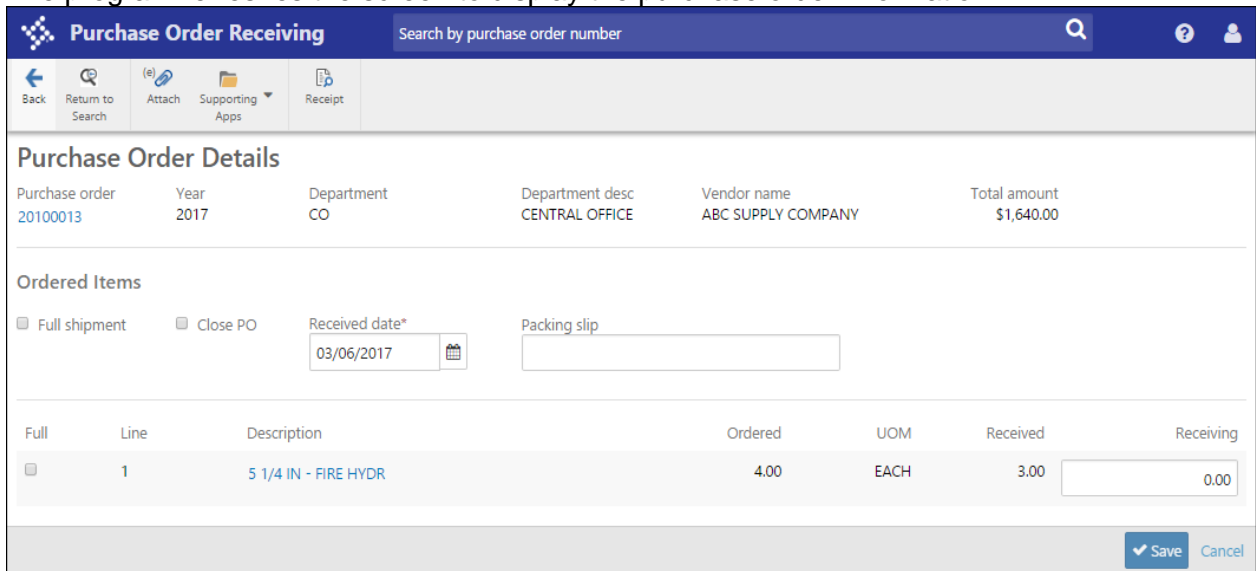
Vendor name

Vendor part number

Department code

Total amount

- Click the link in the PO Number column of the record returned.
 The program refreshes the screen to display the purchase order information.



Purchase Order Receiving Search by purchase order number

Back Return to Search Attach Supporting Apps Receipt

Purchase Order Details

Purchase order	Year	Department	Department desc	Vendor name	Total amount
20100013	2017	CO	CENTRAL OFFICE	ABC SUPPLY COMPANY	\$1,640.00

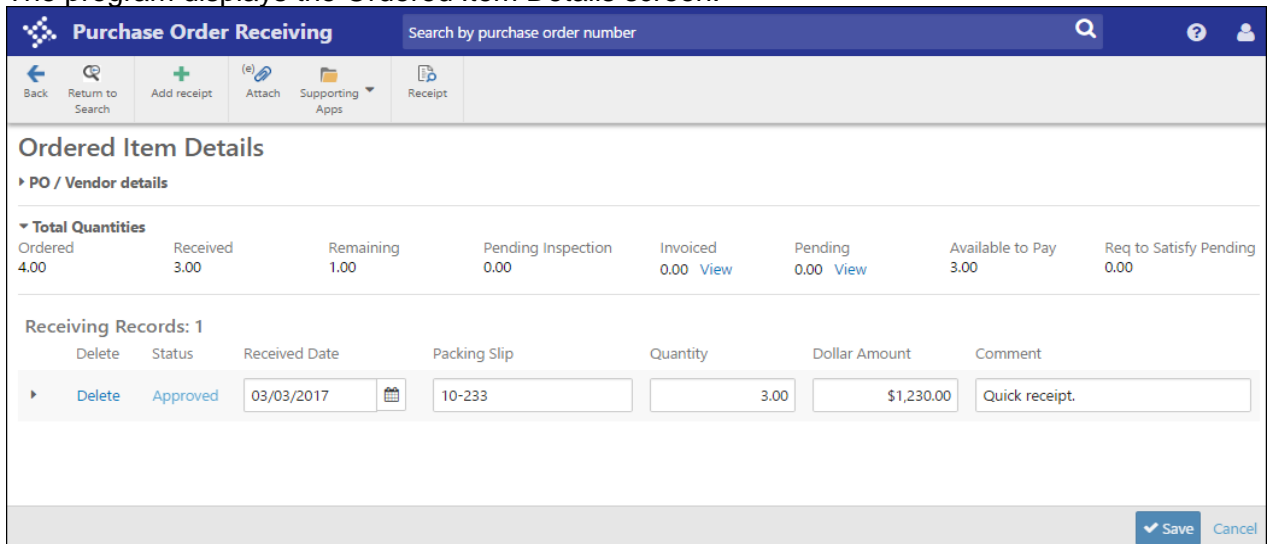
Ordered Items

Full shipment
 Close PO
 Received date*
 Packing slip

Full	Line	Description	Ordered	UOM	Received	Receiving
<input type="checkbox"/>	1	5 1/4 IN - FIRE HYDR	4.00	EACH	3.00	<input type="text" value="0.00"/>

Save Cancel

- Click the Description.
 The program displays the Ordered Item Details screen.



Purchase Order Receiving Search by purchase order number

Back Return to Search Add receipt Attach Supporting Apps Receipt

Ordered Item Details

PO / Vendor details

▼ Total Quantities

Ordered	Received	Remaining	Pending Inspection	Invoiced	Pending	Available to Pay	Req to Satisfy Pending
4.00	3.00	1.00	0.00	0.00 View	0.00 View	3.00	0.00

Receiving Records: 1

Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
▶ Delete	Approved	03/03/2017	<input type="text" value="10-233"/>	<input type="text" value="3.00"/>	<input type="text" value="\$1,230.00"/>	<input type="text" value="Quick receipt."/>

Save Cancel

- In the Receiving Records section, click the arrow for an individual row to open the full details about that receiving record.
- Enter the quantity of returned items and a comment regarding the return in the Quantity and Comments fields.

Receiving Records: 1

Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
<input type="button" value="Delete"/>	Approved	03/03/2017	10-233	3.00	\$1,230.00	Quick receipt.

Fully invoiced
 Close PO
 Quantity invoiced: 0.00
 View
 Capital assets
 Received by: dan.olson

Quantity returned	RMA	Return comment
\$0.00		

- Enter the quantity returned and any applicable comments.

Receiving Records: 1

Delete	Status	Received Date	Packing Slip	Quantity	Dollar Amount	Comment
<input type="button" value="Delete"/>	Approved	03/03/2017	10-233	3.00	\$1,230.00	Quick receipt.

Fully invoiced
 Close PO
 Quantity invoiced: 0.00
 View
 Capital assets
 Received by: dan.olson

Quantity returned	RMA	Return comment
\$410.00		Returned due to casting flaw

- If this receipt is for a capital asset, click Capital Assets.
- Click Add to create a new capital asset from the received items. The program provides entry fields for the Capital Assets group.

Capital Assets ✕

Delete	Capital asset tag	Manufacturer serial#	Imported
<input type="button" value="Delete"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Imported

11. Click Save.

12. Close the Order Item Detail screen.

The program returns to the main Purchase Order Receiving screen.

Results

The original Purchase Order receiving record is updated.

GL Impact

The general ledger is not affected by this action.

Results

Approval Status

- 1- Rejected: The requisition has been rejected by an approver. Click the Approvers button to view the rejection comments. To update a rejected requisition, click the Activate button.
- 2- Created: The requisition header (general) details have been entered, but general ledger (GL) details have not been entered, or, the requisition has header and GL detail, but does not have the appropriate budget to move it to a Status 4. In this case, a budget transfer must be made and posted, after which, you can click the Allocate option to move the requisition to a status 4–Allocated.
- 4- Allocated: The requisition has been entered and has been allocated (charged) to a general ledger account, therefore money is being taken from available budget. The requisition has not been released into Workflow. A requisition must be in a status 4–Allocated to be released into Workflow; click Release to initiate the Workflow process.
- 6- Released: The requisition has been released into Workflow and is awaiting approval. Click the Approvers button to see the current approval status.
- 8- Approved: The requisition has been fully approved in Workflow and is ready to be converted to a purchase order.
- 0- Converted: The requisition has been converted to a purchase order. The number is included on the Terms/Miscellaneous tab in Requisition Entry.

Status Change

With Workflow in place, a released requisition has a status of 6–Released. To see the approval process at any point, click the Approvers button on the Workflow group of the Requisition Entry screen.



Requisitions must be successfully approved by all approvers prior to being converted to into a purchase order. Once a requisition is approved, it is eligible to be converted into a purchase order. When your requisition has been converted to a purchase order, you receive a confirming email.

Handling Rejected Requisitions

Reactivating a Rejected Requisition in Requisition

If a requisition is rejected, the originator receives an email. Rejection notes can be viewed in the original requisition within the Requisition Entry program. If the requisition has been rejected, it must be reactivated prior to making any changes to the requisition.








To reactive a rejected requisition:












- On the Requisition Entry header, click Search, enter search criteria to identify the submitted requisition, and then click Accept to execute the search.
- Click Notes to view the rejection notes. At this point, determine whether the requisition can be resubmitted with changes. If so, proceed.
- Click Activate to change the status from 1- Rejected to 4-Allocated.
- Click Update on the toolbar to make changes to the Requisition header.
- To make changes to the line items, click Line Detail and make the necessary changes to the appropriate lines. Be sure to save any changes by clicking Accept.
- When line item changes are complete, click Return on the toolbar to return to the Requisition Entry screen.









Once all changes have been made, click the Release option on the Requisition Entry screen to resubmit the requisition to the approval process.

REFERENCE TOOLS:

The following table provides descriptions for common Munis toolbar buttons.

Button	Description
Accept 	Accept saves information after you have created or updated a record. This button typically displays when you are adding, updating, or searching for records.
Add 	Add enters a new record into the database. When you click Add, entry fields become available with the cursor positioned in the first field. The program may place default values in fields to save you keystrokes, but typically you can replace the defaults. You can move from one field to the next by pressing Tab, by using the arrow keys, or by placing the cursor in a field. When the cursor is in a field, helpful information often displays at the bottom of the screen. Some fields have an additional field help button that lists available entries.
Advanced 	Advanced provides advanced searching options. Click the down arrow to access the advanced options available in the active program.
Alerts 	Alerts allow you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute emails at specified dates as a reminder of upcoming events or activities that require attention. Reminder alerts are established using the Alert Administration programs on the System Administration menu. The Alert programs are not available for use with all Munis programs. Click the down arrow to manage alerts.
Attach 	<p>Attach allows you to view, add, or delete documentation related to the current record.</p> <ul style="list-style-type: none"> • If your organization uses Tyler Content Manager (TCM), the Attach option provides the Document Mappings screen, from which you can add or view documents using TCM. • If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you can add or access documentation from your Munis server. Once a file is attached, it is copied and stored with the Munis program. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files. <p>Note: The Attach option is available only if the View Attachments and Associated Documents check box is selected in the Roles–Munis System program. If this check box is not selected, the Attach button is not accessible.</p>
Audit 	Audit provides the audit history for the selected record.
Back 	Back returns you to the main menu if you are currently viewing a primary program screen, or to the previous screen if you are viewing a secondary program screen.

Button	Description
Browse 	Browse is available when an active set of records exists, or after an active set is created using the Search or Define buttons. The browse screen displays a list of all the records in the active set. You can sort, view, or export data from the browse screen. The Excel button exports the data directly to a Microsoft® Excel spreadsheet.
Cancel 	Cancel ends an operation, such as adding or updating a record.
Delete 	Delete removes the currently displayed record or set of records from the program. If the record is being used by another process, you cannot delete it. Once you delete a record, you cannot recover it.
Display 	Display allows you to immediately preview a report on the screen.
Duplicate 	Duplicate creates a copy of data and creates a new record in the same program using the original data as a base. Once you duplicate data, you can modify the new record.
Email 	Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, the Munis program opens and displays the linked record.
Excel 	<p>Excel exports the active set of records to a Microsoft® Excel spreadsheet.</p> <ul style="list-style-type: none"> • If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application. • If you click Excel from a master program or subprogram screen, the program displays the Export Filter screen. Use this screen to specify the data field values to export to Microsoft Excel. When you click Save and Exit, the program opens Microsoft Excel with the selected data in the active worksheet. <p>In each case, the program inserts hyperlinks to the individual Munis records. The file created during export is automatically saved in the directory where the Munis software is installed; use the Save As feature in Excel to save the file to a new location.</p>
MapLink 	MapLink allows integration of map data sources with Munis programs. The web-based version of MapLink is an inquiry-only version. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session.
Notes 	Notes provides the option to add or update notes for the selected record. Click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
Notify 	<p>Notify provides integration with Tyler Notify, which allows you to contact Munis customers by telephone or email using predefined content.</p> <p>Note: This feature is only available if your organization has implemented Tyler Notify.</p>
Output 	Output displays the Output dialog box, which features a list of available printers and print settings.

Button	Description
<p>PDF </p>	<p>PDF creates the report in PDF format. The program opens the document in the installed PDF reader. Note: The PDF button is only accessible if the Output to PDF permission is granted in Munis System Roles for at least one role assigned to your user ID.</p>
<p>Print </p>	<p>Print sends a report directly to your default printer. Default printers are established for your user ID in the User Attributes program.</p>
<p>Query </p>	<p>Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard (similar to the expression builders found in Microsoft Excel or Microsoft Access) allows you to create an expression based on the fields in the active program.</p>
<p>Save </p>	<p>Save creates the report and saves it as a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. You can access Saved Reports by clicking Saved Reports in the Departmental Functions group of the Munis menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.</p>
<p>Schedule </p>	<p>Schedule displays the Appointments screen, which allows you to schedule meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message that contains meeting start and end times, and a meeting description. You can define the meeting times and modify the description, as appropriate. When the email recipient accepts the meeting, it is automatically added to his or her Microsoft Exchange calendar.</p>
<p>Search </p>	<p>Search locates records in a program. Search is often used to create an active set of records before proceeding to another step, such as printing a report, purging records, or posting invoices. In many cases, you can use wildcard characters to further define a search.</p>
<p>Update </p>	<p>Update adds data or changes existing data in a record. You can change data in any active field. Fields that are not active typically are part of the record key. The key is the field or combination of fields that uniquely identifies the record from all other records. If you need to change data in a key field, you must delete the record and enter it again.</p>
<p>Word </p>	<p>Word creates an active set of records to export to Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing. An additional feature of Microsoft Word Export is Mail Merge. This feature enables you to print professional forms, mailing labels, directories, and so on with user-defined templates.</p>

Keyboard Shortcuts

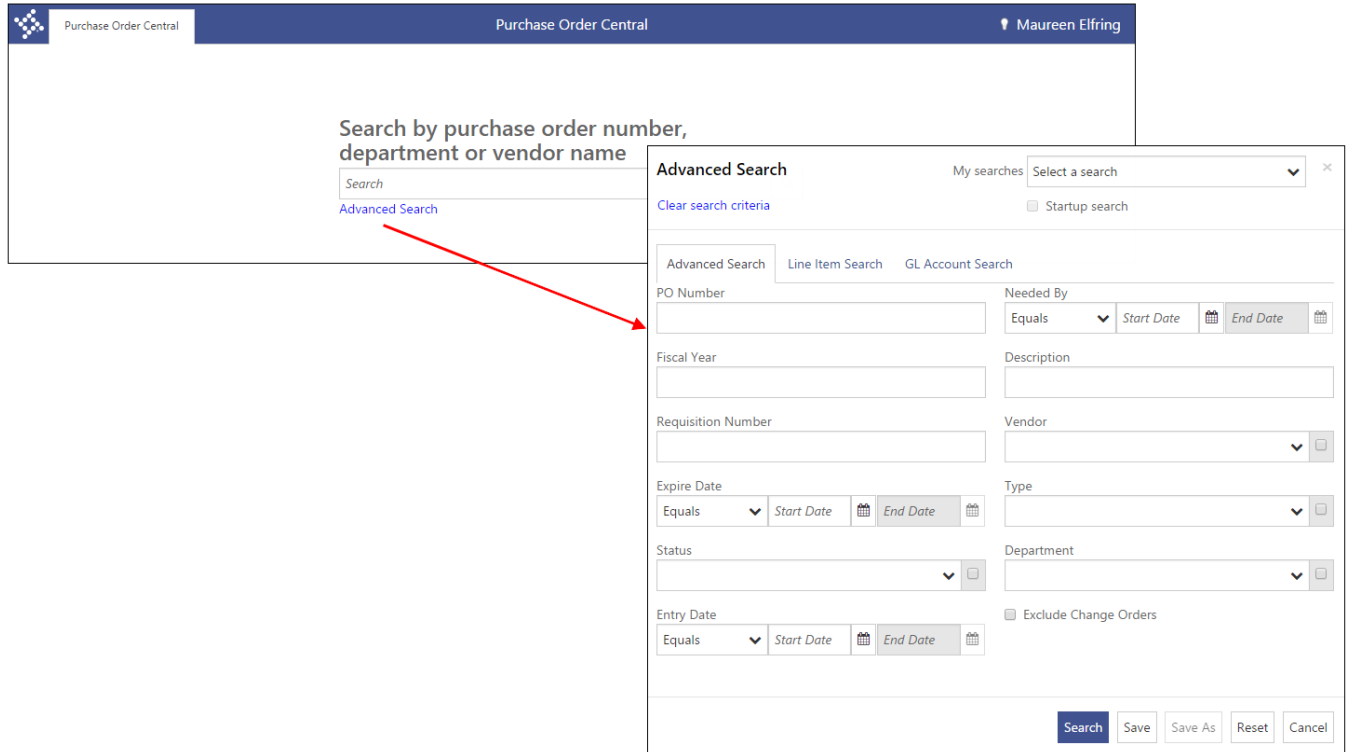
Some actions in Munis can be completed using the keyboard. The following table provides a description of available shortcuts.

Available Keyboard Shortcuts	
Shortcut	Action
Enter	Saves the active record.
Esc	Cancels changes to the active record.
Tab	Moves forward to the next available field; press Shift+Tab to move back to a previous field.
Space Bar	<ul style="list-style-type: none"> • Clears or selects check boxes. • Displays available options in a list field. Use the up and down arrows to move through the options; press Enter to select an option.
Ctrl+U	Initiates Update mode for the current record.
Ctrl+F	Initiates the Search process.
Ctrl+D	Deletes the active record or set of records.
Ctrl+B	Provides a browse screen of the active set of records.
Ctrl+Down Arrow	Moves to the next record in an active set.
Ctrl+Up Arrow	Moves to the previous record in an active set.
Ctrl+Right Arrow	Moves to the last record in an active set.
Ctrl+Left Arrow	Moves to the first record in an active set.

—Purchase Order Central

The Purchase Order Central program provides a listing of purchase orders in both summary and detail views.

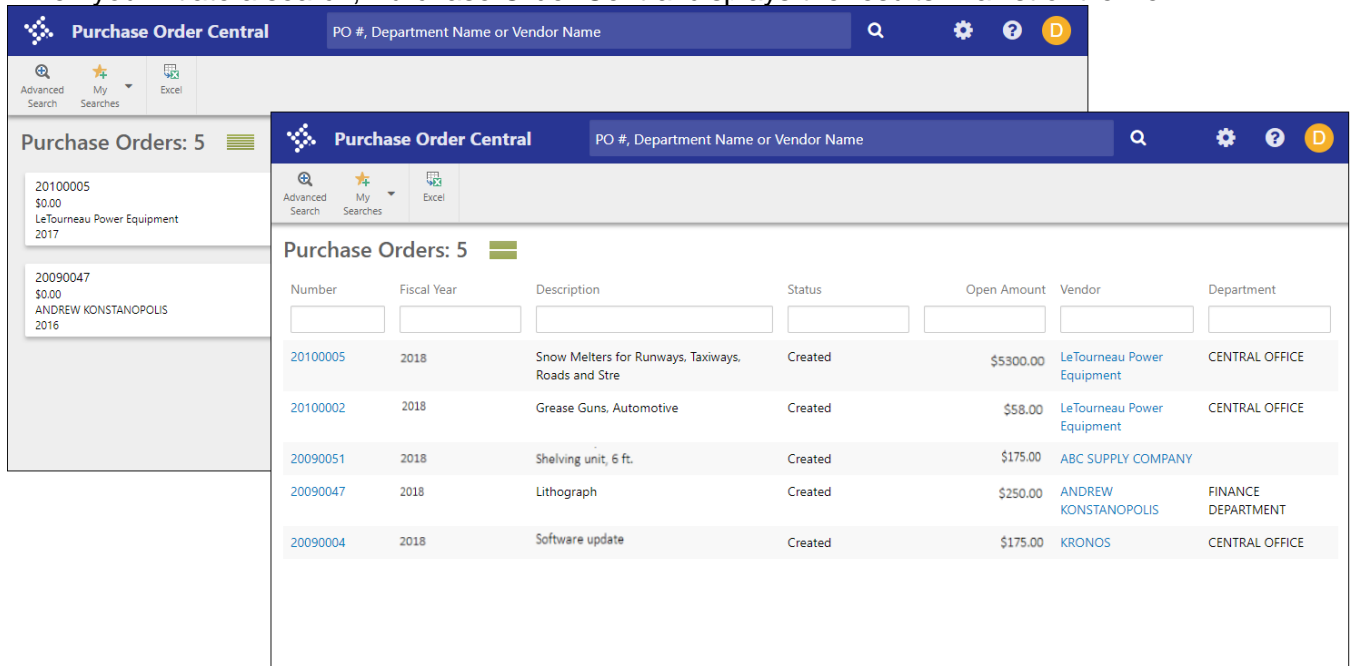
When you open Purchase Order Central, the program displays a Search box where you can enter a specific purchase order number, department, or vendor to find.



The screenshot shows the 'Purchase Order Central' application interface. At the top, there is a navigation bar with the application name and a user profile for 'Maureen Elfring'. Below the navigation bar, the main content area displays a search prompt: 'Search by purchase order number, department or vendor name'. A search input field is present with a 'Search' button and a link to 'Advanced Search'. A red arrow points from this 'Advanced Search' link to a detailed 'Advanced Search' modal window. This modal window features a 'My searches' dropdown menu, a 'Clear search criteria' link, and a 'Startup search' checkbox. It is divided into three tabs: 'Advanced Search' (selected), 'Line Item Search', and 'GL Account Search'. The 'Advanced Search' tab contains several search criteria fields: 'PO Number', 'Fiscal Year', 'Requisition Number', 'Expire Date', 'Status', and 'Entry Date'. Each date field includes a dropdown menu for 'Equals', 'Start Date', and 'End Date' with calendar icons. Other fields include 'Needed By', 'Description', 'Vendor', 'Type', and 'Department', each with a dropdown menu. There is also an 'Exclude Change Orders' checkbox. At the bottom of the modal, there are buttons for 'Search', 'Save', 'Save As', 'Reset', and 'Cancel'.

The Advanced Search option allows you to find a purchase order record using multiple text and list fields. Using Advanced Search, you can also save a search that you can retrieve at a later time using the My Searches list. If you select the Startup Search check box for a saved search, the program automatically initiates that search when you open Purchase Order Central.

When you initiate a search, Purchase Order Central displays the results in a list or tile view.

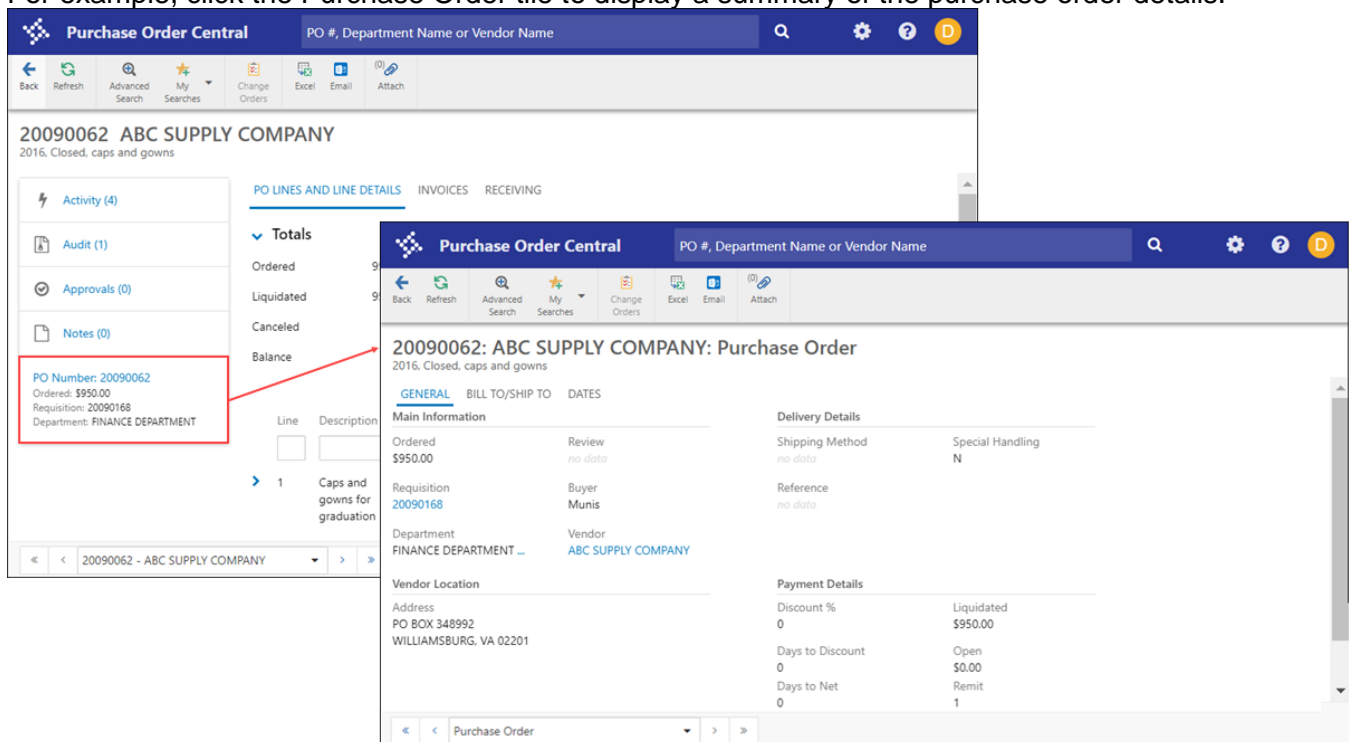


The screenshot shows the 'Purchase Order Central' interface. At the top, there is a search bar with the placeholder text 'PO #, Department Name or Vendor Name'. Below the search bar, there are navigation options: 'Advanced Search', 'My Searches', and 'Excel'. The main content area displays a list of purchase orders. On the left, there is a sidebar with a 'Purchase Orders: 5' header and a list of search results in tile view. The main list view shows the following data:

Number	Fiscal Year	Description	Status	Open Amount	Vendor	Department
20100005	2018	Snow Melters for Runways, Taxiways, Roads and Stre	Created	\$5300.00	LeTourneau Power Equipment	CENTRAL OFFICE
20100002	2018	Grease Guns, Automotive	Created	\$58.00	LeTourneau Power Equipment	CENTRAL OFFICE
20090051	2018	Shelving unit, 6 ft.	Created	\$175.00	ABC SUPPLY COMPANY	
20090047	2018	Lithograph	Created	\$250.00	ANDREW KONSTANOPOLIS	FINANCE DEPARTMENT
20090004	2018	Software update	Created	\$175.00	KRONOS	CENTRAL OFFICE

In list view, click the purchase order number to display the details; in tile view, click the tile to display the details. In either view, the Excel option is available on the toolbar; click Excel to export the search results to an Excel spreadsheet.

On the Detail page, click a tile to further expand the details for a specific purchase order record. For example, click the Purchase Order tile to display a summary of the purchase order details.



The screenshot shows the 'Purchase Order Central' interface in detail view for purchase order 20090062. The header shows '20090062 ABC SUPPLY COMPANY' and '2016, Closed, caps and gowns'. The left sidebar contains a navigation menu with 'Activity (4)', 'Audit (1)', 'Approvals (0)', and 'Notes (0)'. A red box highlights the 'PO Number: 20090062' tile, with a red arrow pointing to the main detail view. The main detail view shows the following information:

20090062: ABC SUPPLY COMPANY: Purchase Order
 2016, Closed, caps and gowns

GENERAL BILL TO/SHIP TO DATES

Main Information

Ordered \$950.00	Review <i>no data</i>	Shipping Method <i>no data</i>	Special Handling N
Requisition 20090168	Buyer Munis	Reference <i>no data</i>	
Department FINANCE DEPARTMENT ...	Vendor ABC SUPPLY COMPANY		

Vendor Location

Address
 PO BOX 348992
 WILLIAMSBURG, VA 02201

Payment Details

Discount % 0	Liquidated \$950.00
Days to Discount 0	Open \$0.00
Days to Net 0	Remit 1