

Adding AP forms to HUB page

From left sidebar menu, select Edit Content

Select Add Card

Select Add Card From Library

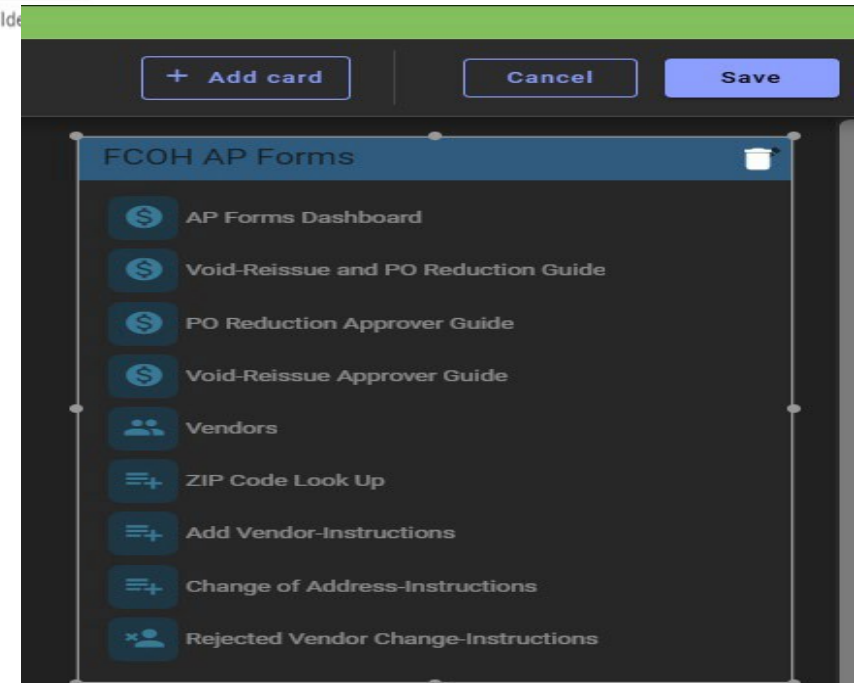
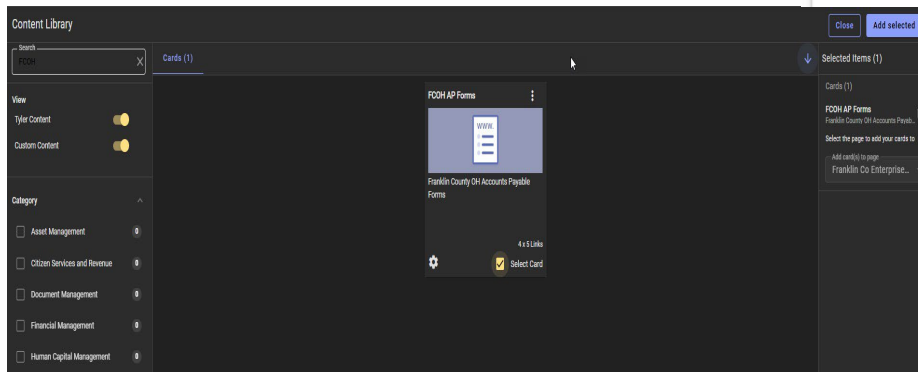
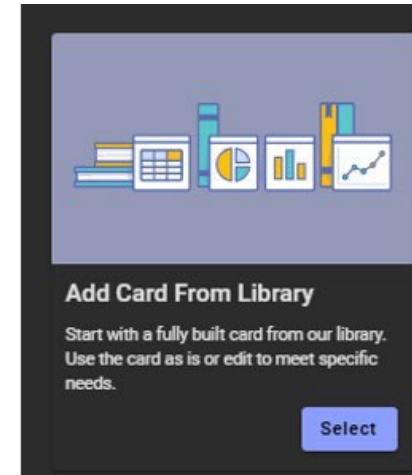
In Top left search bar enter FCOH

FCOH AP Forms card appears → Select Card

Select Add Selected in top right

Leave location as is on page or adjust

Select Save



Edit Card

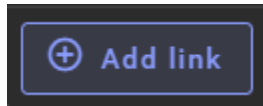


Select Pencil in top right

= → Click to move location of link

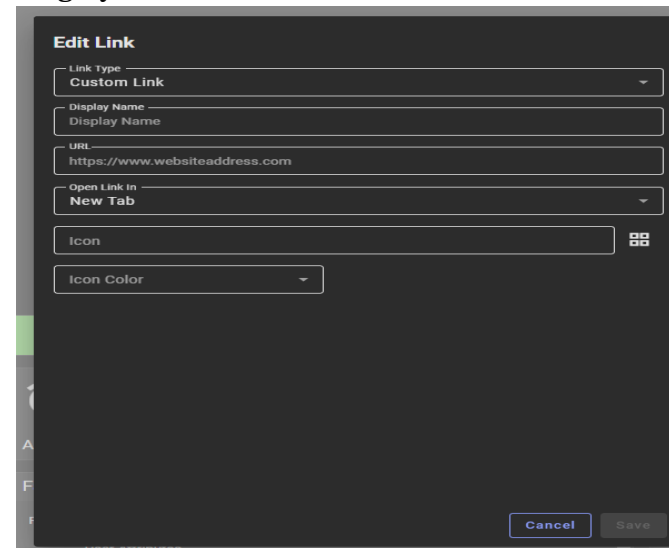
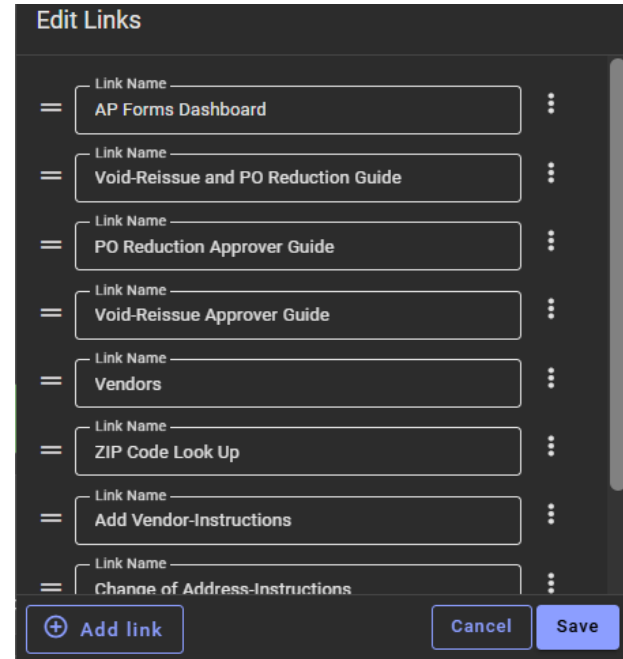


→ Edit Link or Delete Link



→ Add additional links

- Edit Link Box opens
- Select Link Type- Custom or Tyler Menu
- Enter Display Name
- Enter URL (would be a paste of the custom link or selecting Tyler menu link)
- Open Link In → Keep as New Tab
- Select Icon
- Select Icon Color
- Select Save





Submit a Request

New Void and Reissue Request

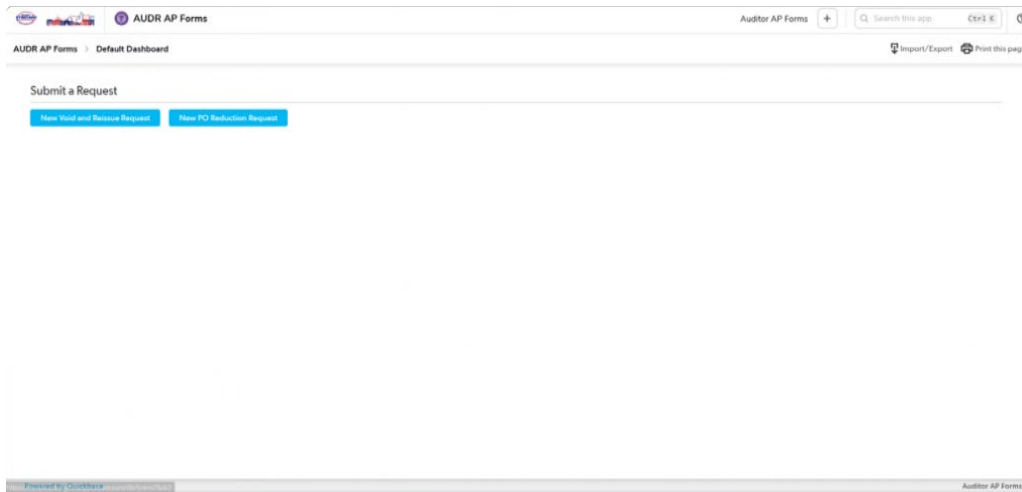
New PO Reduction Request

[AP Forms Mini App Feedback Survey](#)

Void, Reissue, and PO Reductions Request User Guide

Navigate to the URL below to access the respective forms. From the home page you can select which request you would like to submit.

<https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview>



Void and Reissue Request

Please note:

- All fields are required except for phone number and a second authorizer selection.
- The Authorizers drop downs will not populate until an agency has been selected.
- We add a validation code field to make sure the form is being filled out by a real person and not an automated bot sending spam. **The validation code is 47.**
- The save button can be found in the top right corner of the form.

A screenshot of a web form titled "Add Void and Reissue Request". The form is divided into two main sections: "Requester Information" and "Form Information".
Requester Information:
- "Requester's Name *": A text input field.
- "Agency Name *": A dropdown menu with "Select one" and a search icon.
- "Phone Number": A text input field with a country code dropdown (set to "+1 (201) 555-0123") and an "ext." field (set to "1234").
- "Email *": A text input field.
Form Information:
- "Form Type *": A dropdown menu with "Select one" and a search icon.
- "Vendor Name *": A text input field.
- "Vendor Number *": A text input field.
- "Check Number *": A text input field.
- "Amount *": A text input field with a dollar sign and "0.00" pre-filled.
- "Issue Date *": A date picker field with "MM-DD-YYYY" format.
A blue "Save" button is located in the top right corner of the form.

Reason for Request *

Send to Authorizers

Authorizer 1 *

Search and select Q v

Select an Agency first to populate options.

Authorizer 2

Search and select Q v

Select an Agency first to populate options.

Validation Code *

The Validation Code is 47.

PO Reduction Form Request

Please note:

- You are limited to 10 PO Reduction requests on one form, if you need to submit more, you are required to submit an additional form.
- To add an additional requests, please select the checkbox to display an additional line.
- All fields are required except for phone number and a second authorizer selection.
- The Authorizers drop downs will not populate until an agency has been selected.
- We add a validation code field to make sure the form is being filled out by a real person and not an automated bot sending spam. **The validation code is 47.**
- The save button can be found in the top right corner of the form.

save
Cancel
⋮

PO Requesters > Add PO Requester

Requestor Information

Requestor Name *

Email *

Authorizer 1 *

Search and select Q v

Select an Agency first.

Authorizer 2

Search and select Q v

Select an Agency first.

Agency *

Select one Q v

Phone Number

ext. 1234

Validation Code *

The Validation Code is 47.

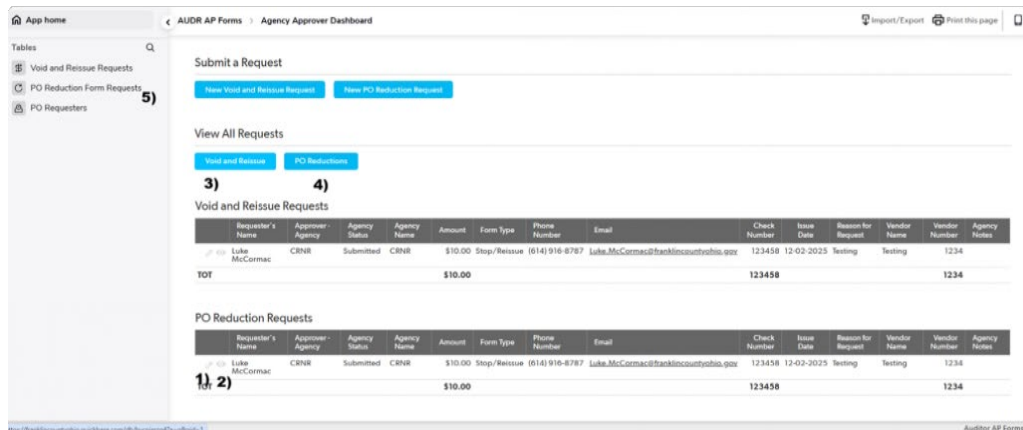
PO Reduction Form Requests

PO Number *	Line Number *	Ordered Amount *	Current Amount *	Reduce PO By *	New Amount	Available Balance	Decrease or Close	Notes
			Liquidated Amount		0	0	Decrease	
			Liquidated Amount	New Available Balance				
<input type="checkbox"/> Request 2								

PO Reduction Approver Guide

This User guide will demonstrate how as an Agency manager you can view, return, and approve PO Reduction requests. You can access the application using your windows credentials (the same credentials you log on to your computer with) at this URL.

<https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview>



This is the initial landing page where you are presented with 5 options.

This pencil icon is what you would select to edit a request, in this case you can update the status to approved or returned and add any relevant notes.

The eye icon allows you to view a request.

The default tables on the home page only display requests that need worked, that would be requests in a 'submitted' status. However if you would like to access all requests, including those which have been returned or approved you can use this button to view all of the Void and Reissue requests.

This button has the same function as #3, however it is for PO Reduction Form Requests.

You can also use these table links to view the complete listing of all requests in any of the three statuses.

If you select the pencil for a PO Reduction request you will be redirected to the screen below.

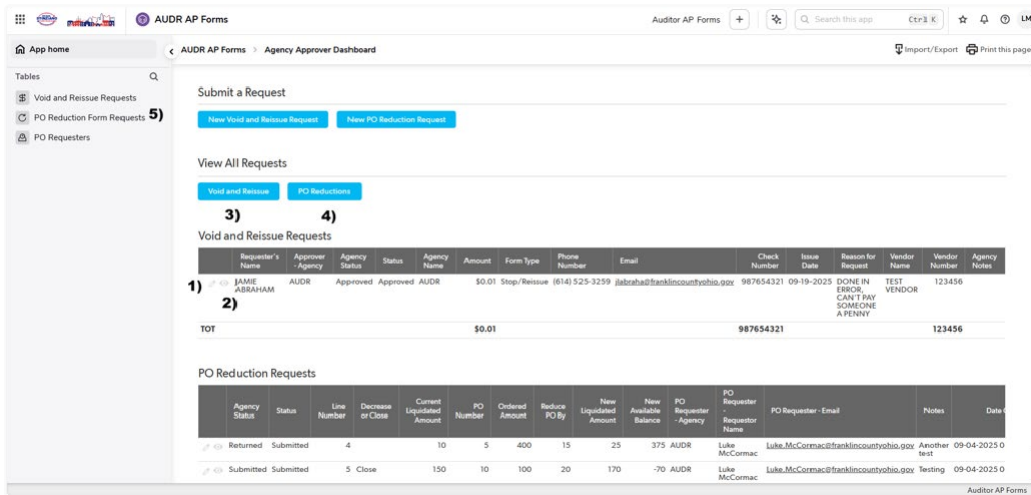
PO Requester - Agency	PO Requester - Requestor Name	PO Requester - Email	Date Created
AUDR	Luke McCormac	Luke.McCormac@franklincountyohio.gov	09-04-2025 08:21 AM
PO Number	Line Number	Decrease or Close	Ordered Amount
5	4		400
Current Liquidated Amount	Reduce PO By	New Liquidated Amount	New Available Balance
10	15	25	375
Agency Status	Returned		
Agency Notes *	Returned		

From here you can review the request and select if it should be approved or returned by using the drop down field. **Note: if you select the status to be returned, you must provide notes in the 'Agency Notes' field explaining why. These will be included in an email that is automatically sent to the user who submitted the request letting them know why it was returned.**

Void and Reissue Approver Guide

This User guide will demonstrate how as an Agency manager you can view, return, and approve Void and Reissue requests. You can access the application using your windows credentials (the same credentials you log on to your computer with) at this URL.

<https://franklincountyohio.quickbase.com/nav/app/bvbm28ub3/action/appoverview>



This is the initial landing page where you are presented with 5 options. This guide focuses on Void and Reissue so we will look at this table first.

1) This pencil icon is what you would select to edit a request, in this case you can update the status to approved or returned and add any relevant notes.

The eye icon allows you to view a request.

The default tables on the home page only display requests that need worked, that would be requests in a 'submitted' status. However if you would like to access all requests, including those which have been returned or approved you can use this button to view all of the Void and Reissue requests.

This button has the same function as #3, however it is for PO Reduction Form Requests.

You can also use these table links to view the complete listing of all requests in any of the three statuses.

If you Select the 'pencil' icon for a void/reissue request you will be directed to this screen below.

Void and Reissue Re
Reports

Edit Void and Reissue Request #5

Save Cancel

> Requester Information

> Form Information

Send to Authorizers

Authorizer 1 *

1

Select an Agency first to populate options.

Authorizer 2

Select an Agency first to populate options.

Agency Status

Approved X

Agency Notes

Validation Code *

1234

The Validation Code is 47.

Auditor AP Forms

From here you can review the request and select if it should be approved or returned by using the drop down field. **Note: if you select the status to be returned, you must provide notes in the 'Agency Notes' field explaining why. These will be included in an email that is automatically sent to the user who submitted the request letting them know why it was returned.**

If you select the pencil for a PO Reduction request you will be redirected to the screen below.

TRAIN: <https://franklincountyoh-train.tylerhub.com>

Vendors [FRANKLIN COUNTY | TRAIN | 04/23]

Close Search Browse Add Update Delete Output Print Display PDF Save Excel Word Email Schedule Attach Sort REQ Vendors 1009 Data RST TIN Match Invoice Inquiry Check Inquiry PO Inquiry Recurring Invoices GL Summary History Contact Awarded Commodities Mass Inactivate Mass Update Schedule Export

Vendors [FRANKLIN COUNTY | TRAIN | 04/23]

General Vendor Information

Vendor * Entity *
Alpha * Type
Status * Reason

Audits

Entered
Modified
By
Change Set

Main General Miscellaneous Contacts Certifications Insurances Withholding Warning Messages

Contact Information

Company name * Addresses (0) Comments (0)

DBA

Address

Zip code

City

State

Country Foreign entity

Email

Fax

WWW

Identification

SSN
FID
DUNS

Independent contractor
 Verified TIN

Additional

Vendor Alerts



Quick Tools

Send

Receive

Shop

@ English

(.) Locations

'J Support

◆ InfoMed Delivery

Register/Sign In

Business

International

Help



Look Up a ZIP Code™

FAQs)

By Address

Enter a corporate or residential street address, city, and state to see a specific ZIP Code™.

Find by Address

By City and State

Enter city and state to see all the ZIP Codes™ for that city.

Find by City & State

Cities by ZIP Code™

Enter a ZIP Code™ to see the cities it covers.

Find Cities by ZIP

uUSPS.COM'

HELP & LINKS

- Contact Us
- Site Index
- FAQs
- Feedback

USPS JOBS

Ca*****

ON ABOUT USPS.COM

- About USPS Home
- Newsroom
- USPS Service Updates
- Forms & Publications
- Government Services
- Rights & Permissions

OTHER USPS SITES

- Business Customer Gateway
- Postal Inspectors
- Inspector General
- Postal Explorer
- National Postal Museum
- Resources for Developers
- PostalPro

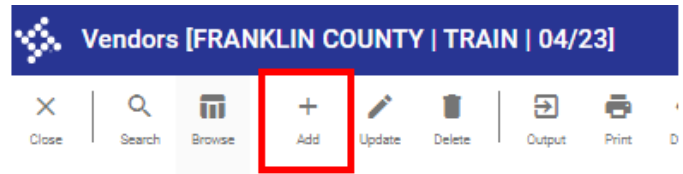
LEGAL INFORMATION

- Privacy Policy
- Terms of Use
- FOIA
- No FEAR Act/EEO Contacts
- Fair Chance Act
- Accessibility Statement



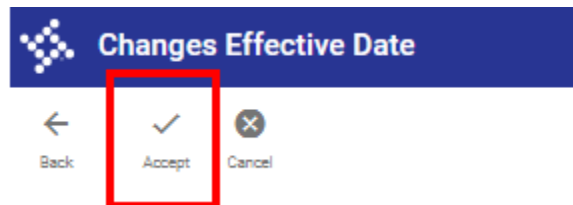
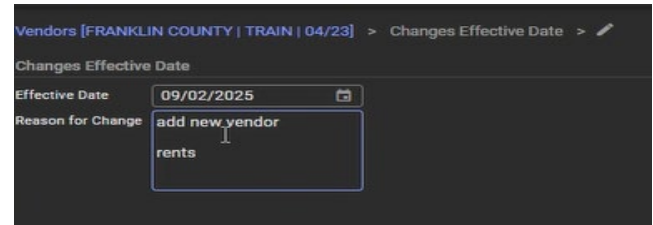
Adding a Vendor

Navigate to Financials > Accounts Payable > Vendor Processing > Vendors

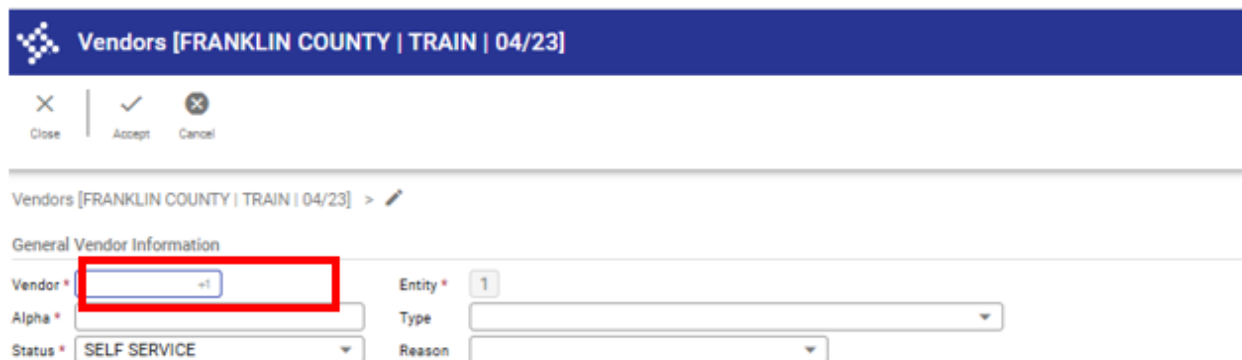


Or Select Vendors from the FCOH AP Forms Card

- At the top of the page select “Add”
 - This will open the Changes Effective Date page
 - Leave Effective date as is.
 - Type “ADD NEW VENDOR” (PLEASE USE ALL CAPS) and the “Description of Services Provided” for Reason for Change
 - Examples (Rent, Auto Repair, Kinship, Comp & Damages, etc...)
 - This will be used to determine 1099 information by the Auditor AP team.



- Select Accept-This will take you back to the Vendors page.
 - TAB key will also work as Accept (not ENTER)



- Click the “+1” in the Vendor field to select the next available number.

The screenshot shows a form with the following fields highlighted in a red box:

- Vendor #: 415983
- Alpha: TEST VENDOR
- Status: ACTIVE
- Entity: I
- Type: [Dropdown]
- Reason: INDV - INDIVIDUAL

- Fill in the Alpha field with the name of the Vendor
 - Note: Maximum of 20 characters in the field.
 - Note: If the vendor is an **individual** then key (last name, first name)
 - Example **LAST, FIRST** (make sure to use a comma then a space before adding the first name)
- Change the Status Field to “Active”.
- Use the drop down under the Reason field to select the best match based on box 3a of the W-9 provided by the vendor and the services provided.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor
 C corporation
 S corporation
 Partnership
 Trust/estate
 LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)

Note: Check the “LLC” box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

Other (see instructions)

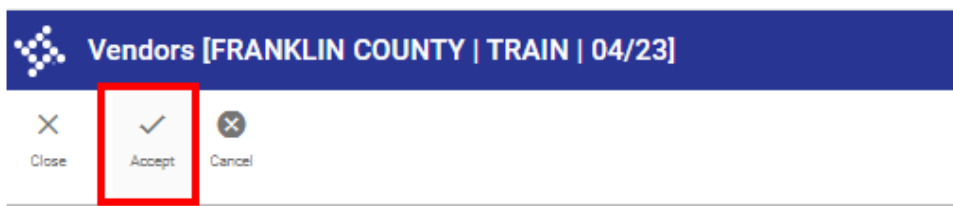
3b If on line 3a you checked “Partnership” or “Trust/estate,” or checked “LLC” and entered “P” as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions

- **100 - COMPENSATION & DAMAGES:** Used if payments will be for Compensation.
- **101 – SETTLEMENT PAYMENT:** Used if payments will be for Settlements
- **CHUR – CHURCH :** Used for Churches
- **CORP – CORPORATION :** Used if S Corp or C Corp is checked
- **FSTR – FOSTER PARENT:** Vendor will be paid for being a Foster Parent
- **GOVT – GOVERNMENT AGENCY**
- **IND – INDIVIDUAL:** Used when Individual/Sole proprietor is checked and an SSN is provided
- **K – KINSHIP:** Vendor will be paid for being Kinship
- **NFP – NON-PROFIT ORGANIZATION:** Used for Non Profit organizations
- **PART – PARTNERSHIP:** Used when Partnership is checked
- **SOLE – SOLE PROPRIETOR :** Used when Individual/Sole proprietor is checked and an EIN is provided
- **TR/E – TRUST/ESTATE:** Used if Trust/Estate is checked
- **V – VOLUNTEER/INTERN:** Used for Interns

- Using the new W-9 fill in the following fields in ERP
 - Company name
 - **Note:** will auto generate from what was entered in the Alpha field but will need to be updated if the name is greater than 20 characters or was an individual.
 - **Individual should be First name Last name in the Company name field**
 - Ex. FIRST LAST
 - DBA (If applicable)
 - Address
 - **Type in the 2nd address line**
 - Only use the 1st address line for “ATTN” (If applicable)
 - Zip Code (include +4)
 - City
 - State

What if the address for the vendor needs to be different from the W-9?

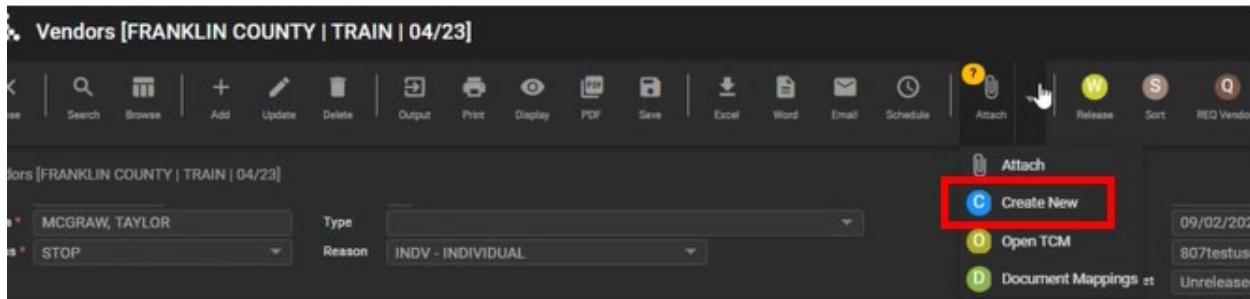
- A sticky note can be added to the W-9 when it is uploaded in TCM (Content Manager) listing the address keyed.
 - See instructions for attaching W-9



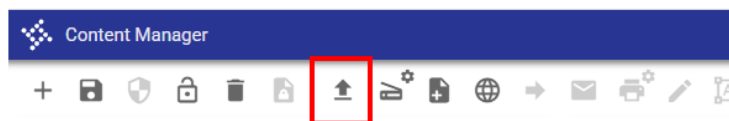
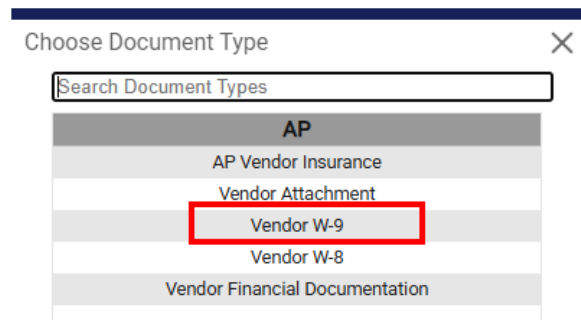
- Select Accept

NOTE: The status will now say “STOP”. Status * STOP Once the workflow is approved by AP the status will change back to active.

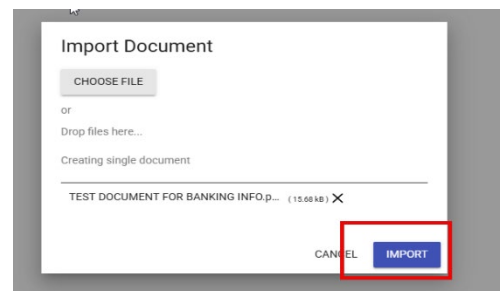
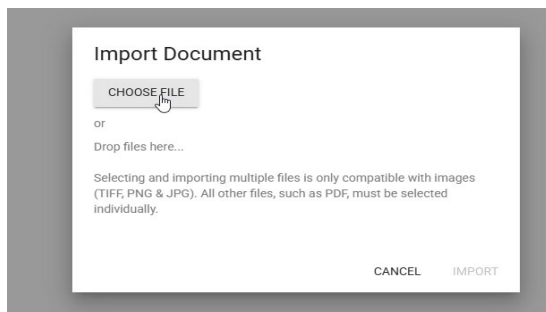
Attaching the W-9



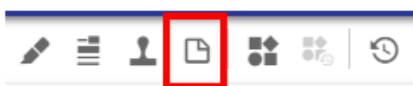
- Click on the drop down beside the attachment and select “Create New”
 - This will open Content Manager
 - Select “Vendor W-9”



- Upload the W-9 PDF by using the Import attachment.
 - Either choose file or drag and drop file to import.



- When file has been loaded, select import
- If the address for the vendor needs to be different from what is on the W-9 the “Add a sticky note” option can be used.



- After selecting this option click and drag on the uploaded W-9 to create the sticky note.
- Then edit the text field to show the correct address.

- 1-Select disk icon to Save
- 2-Select lock to mark confidential
 - This step must be completed to safeguard associated sensitive information.

The screenshot shows the Content Manager interface. On the left, there is a 'Documents' list with columns for Date, Vendor Number, Description, and DocType. A document with Vendor Number 'APVendor' is visible. On the right, the 'W-9 Request for Taxpayer Identification Number and Certification' form is displayed. The form includes fields for Name of entity/individual, Business name, Federal tax classification, Exemptions, Address, and City/ZIP code. The 'Part I Taxpayer Identification Number (TIN)' section is also visible.

- Select Accounts payable for confidential reasons

The 'Confidential Reasons' dialog box is shown. It contains the text 'Confidential Reasons' and a checkbox for 'Accounts Payable', which is currently unchecked. At the bottom right, there are two buttons: 'CLOSE' and 'SAVE'.

- Select Ok on the following Pop up

The 'Warning' dialog box is displayed. The text inside reads: 'Warning' followed by 'You do not have permission to view documents with the Accounts Payable confidential reason. If you submit with this checked, you will no longer be able to view this document.' An 'OK' button is located at the bottom right.

- Then select Save

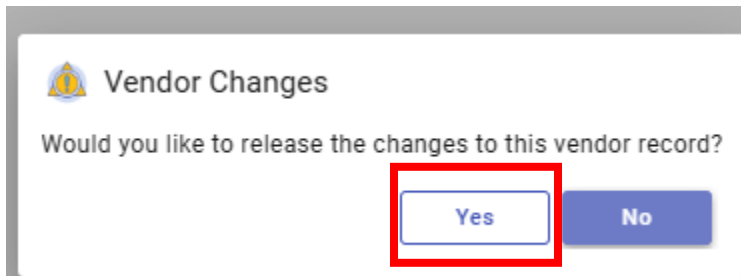
The 'Confidential Reasons' dialog box is shown again, but now the 'Accounts Payable' checkbox is checked. The 'CLOSE' and 'SAVE' buttons remain at the bottom right.

- The following pop up will appear
 - Select OK
 - Close out of Content Manager window.
 - This will take you back to the Vendor page

The 'Warning' dialog box is displayed. The text inside reads: 'Warning' followed by 'You no longer have permission to view the previous document.' An 'OK' button is located at the bottom right.

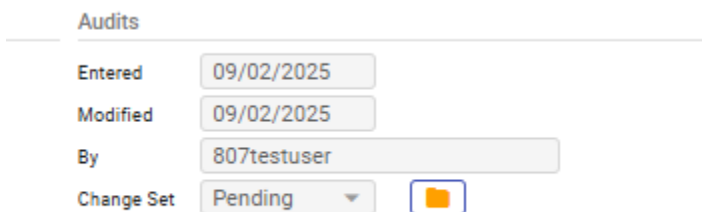


- Select “Release” at the top of the page.



- Select Yes on the pop up.
- This will start the Workflow process

Once Released the “Change Set” field under the Audits section of the vendor should now say “Pending”.



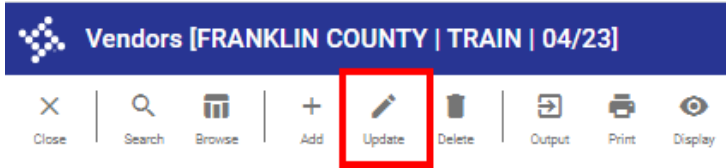
Note: The Option to release at the top of the page is only available if there are pending items.

- Once submitted and Approved or Rejected by AP you will either receive an email notifying you that the new vendor is ready to be used or a rejection email.
 - The Approval email will come from a member of the AP Team
 - The rejection email should give you a reason why the submission was rejected and will come from ERP.
 - Follow Rejected Vendor Change instructions.

Change of Address

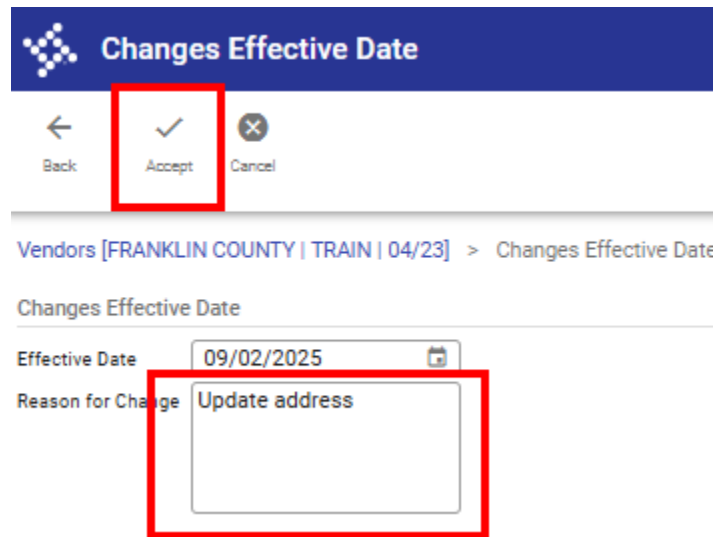
Vendors Hub

- Search for the vendor that needs the change of address.

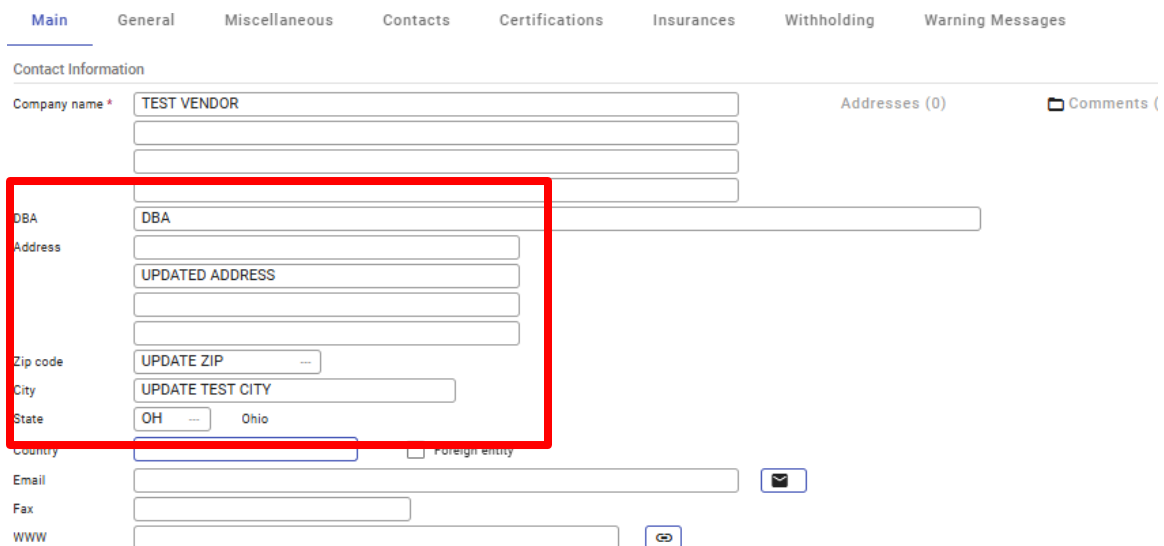


- Select “Update” at the top of the page

- The Changes Effective Date page will open.
 - Fill out the “Reason for Change” field
 - Examples
 - Update address
 - Add remit #1
 - Update remit #1
- Accept at the top of the page.
 - TAB (not ENTER) will accept.



- The vendor page will appear again with the ability to edit fields.

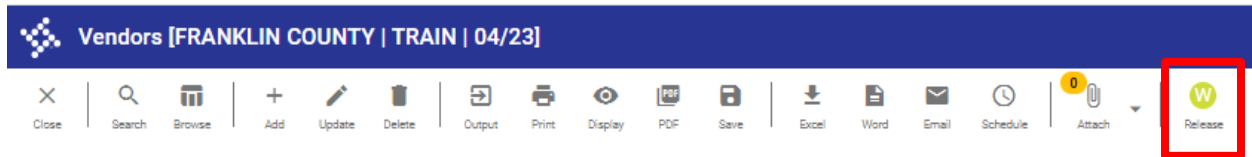


- Update all fields that need changed for the updated address/ new remit address.
 - DBA (if applicable)
 - Address
 - Zip (+4)
 - City
 - State

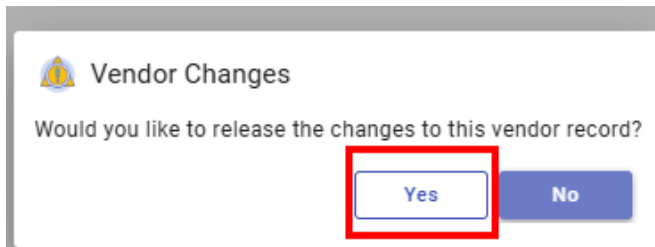


- Accept once all necessary fields have been updated
- The following message will appear at the bottom of the page

Release changes to the vendor to workflow. (W)
 Records submitted for approval and are awaiting release.

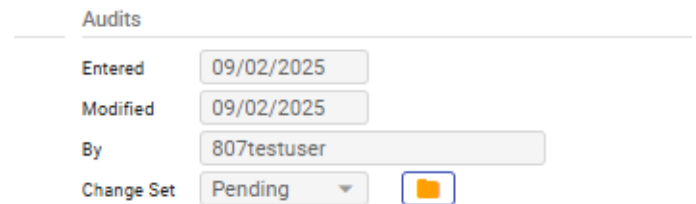


- “Release” at the top of the page



- - Select Yes on the pop up.
 - This will start the Workflow process

- Once Released the “Change Set” field under the Audits section of the vendor should now say “Pending”.



Note: The Option to release at the top of the page is only available if there are pending items.

Note: Additional remit addresses will be added at the discretion of the Auditor’s office.

Rejected Vendor Change

If you've added a new vendor to the workflow and it gets rejected, you'll receive an email like the image below. The rejection email will specify the reasons for the vendor's rejection.

To correct the issue:

- From Vendors
- Search by Vendor #
- Select → Update
- Enter Reason for Change: New Vendor Correction
- Select Accept
- Make the necessary corrections, including updating the status from STOP to Active
- Select Accept
 - Records submitted for approval and are awaiting release.
- Select Release
 - Releases changes to the vendor to workflow.

Pending Vendor Change Rejected



munisadmin@franklincountyohio.gov
To ✓ Abraham, Jamie L.

Vendor 416015 Change (1) that was to be effective on Sep 23 2025 12:00AM has been rejected by 807ajtowns. 807ajtowns's comment was: ZIP CODE INCORRECT.

To view additional information about this Munis item use this link:

[Additional Information](#)



This is a Munis system generated message. Please do not reply to this unmonitored mailbox.