



This document explains new product enhancements added to the **ADMINS Unified Community (AUC) for the Windows PURCHASE ORDER** system.

CONTENTS

1	SUPPRESS EMAILING CHANGE ORDERS TO VENDORS [ENHANCEMENT]	2
2	QUESTIONS ABOUT HOW POS ARE PAID?	3
3	VENDOR CHANGES FIELD LOGGING [ENHANCEMENT]	3
4	HELP REFERENCE LIBRARY & ADMINS WEBSITE UPDATES	5
4.1	New Content in the Help Reference Library	5
4.2	New Content on ADMINS.com	5



1 Suppress Emailing Change Orders to Vendors [Enhancement]

Sites can email purchase orders to vendors instead of sending them via postal mail. There are settings on the Vendor record and the PO screen that control this.

Figure 1 The vendor is set up with an email address.

The checkbox on the PO is set to email the vendor:

Some sites have requested the ability to **suppress emailing change order forms to vendors**, because their vendors are confused by the change orders and sometimes duplicate an order.



To address this request, **ADMINS** added a module control that allows sites to **suppress emailing Purchase Change Order Forms** to vendors for whom the email is set up for Purchase Orders. The new module control number is 3100. To access the control, from the menu, select:

Purchase Orders ▶ Module Maintenance ▶ Module Control ▶ #3100

Purchase Order Module Control			
Seq#	Description	Answer	Buttons
3100	[Change Order] Email Copies of Change Orders to Vendors [Y/N]	Y	

All sites will be set to “Y” during the update by default. Set the value to “N” to suppress emailing change orders to the vendor. This will override any vendor and purchase order options set to email the Change order form. The **Purchase Change Order** will **not be emailed** if the value of module control #3100 is set to “N”.

When posting the change order, set the “Print Purchase Change Order as:” radio button to Differences or Revised. A PDF copy of the change order will be attached to the PO – but the change order will not be emailed to the vendor.

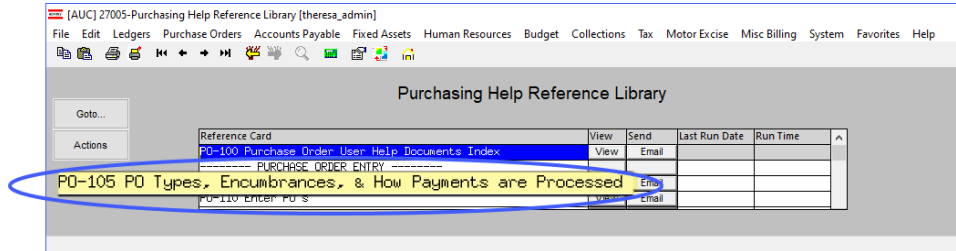
[HVMA-SUP-SAPLAUC-64]



2 Questions About How POs are Paid?

Please read the updated document, PO-105 PO Types, Encumbrances, & How Payments are Processed in the Help Reference Library. To access the document, from the menu select:

Purchase Orders ▶ Help Reference Library ▶ PO-105 PO Types, Encumbrances, & How Payments are Processed



There is updated content throughout the document; in particular, sections 7.1, 7.3.2, and 9 are new and explain how payments are applied.

7.1 Examples of Voucher Price Different from the PO Price
Here are some examples of what happens when:

7.1.1 Voucher Price is *Lower* than on the PO
PO Price \$10 for Qty 5 10 * 5 = \$50
Voucher Price \$8 for Qty 8 * 5 = \$40

When the voucher is posted it hits the **expense** Account for:

Voucher Price * Voucher Qty 8 * 5 = \$40

and relieves the encumbrance of

PO Price * Voucher Qty 10 * 5 = \$50

This increases the available (unencumbered) balance in this account by **\$10** because it relieved the encumbrance at the higher price.

7.1.2 Voucher Price *Higher* than on the PO
PO Price \$10 for Qty 5 10 * 5 = \$50
Voucher Price \$12 for Qty 12 * 5 = \$60

When the Voucher is posted it hits the **expense** account for:

Voucher Price * Voucher Qty 12 * 5 = \$60

And relieves the encumbrance of

PO Price * Voucher Qty 10 * 5 = \$50

Since the Voucher price is **higher** the overall balance on this account is **reduced by \$10** because it took the extra \$10 as an expense that was not encumbered.

7.3.2 POs That are Overpaid
If the PO is not a zero-tolerance PO, and the threshold is set at 10%, then the system will allow overpayment on lines on a PO up to but not exceeding the 10% tolerance per line.

For example, a PO is out for \$500.00, with a 10% tolerance threshold specified on Module Control Sequence # 2201.

Figure 5 Regular PO that allows overpayment of up to 10% per line

Line 1 for \$1,340.00 will allow a \$134.00 overage, which comes to a maximum of \$1,474.00 for the line within the 10% tolerance.

Line 2 for \$552.00 will allow a \$55.20 overage, which comes to a maximum of \$607.20 for the line within tolerance.

Line 1 will relieve the \$1,340.00 encumbrance, and reduce the overall balance of the expense account by the additional \$134.00 overage.

Line 2 cannot exceed \$607.20, and will have to be adjusted per the instructions on the error report when the batch is checked.

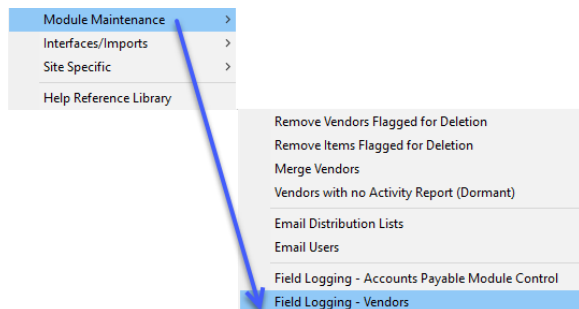
The line for \$1104.00 voucher payment is equal to the PO price.

Figure 6 Overpay a Line on a PO within 10% tolerance, and a second line exceeds the tolerance

Figure 7 The error check shows that line 2 exceeds the 10% tolerance and will not be paid. The PO must be adjusted to allow the payment of \$614.00. Each line is considered independently, and even though the entire PO is still within the encumbered amount plus the tolerance, this line is not within the 10% tolerance.

[ADM-AUC-DOC-228]

3 Vendor Changes Field Logging [Enhancement]



ADMINS added field logging to the Enter Vendors screen. This means that when changes are made to a vendor record, there is an audit trail. To access the information, from the menu, select:



Purchase Orders ▶ Module Maintenance ▶ Field Logging – Vendors

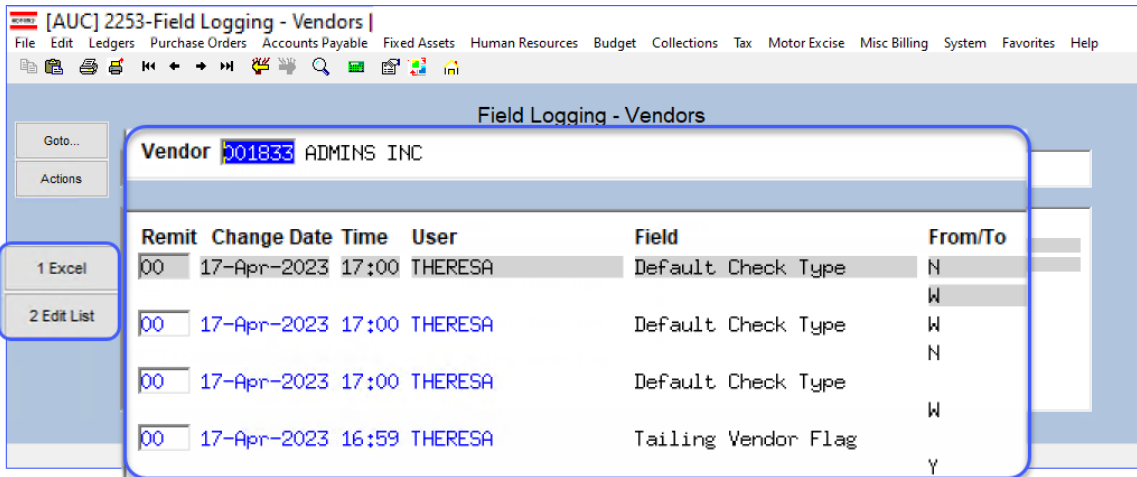


Figure 2 The Field Logging – Vendors screen shows who, when, and what was changed

The changes made on the Enter Vendors screen will all be logged and available on this Field Logging screen. That includes all changes to all the tabs with the exception that **changes are not logged for the attachments tab**. This will help answer questions users may have about who changed vendor information.

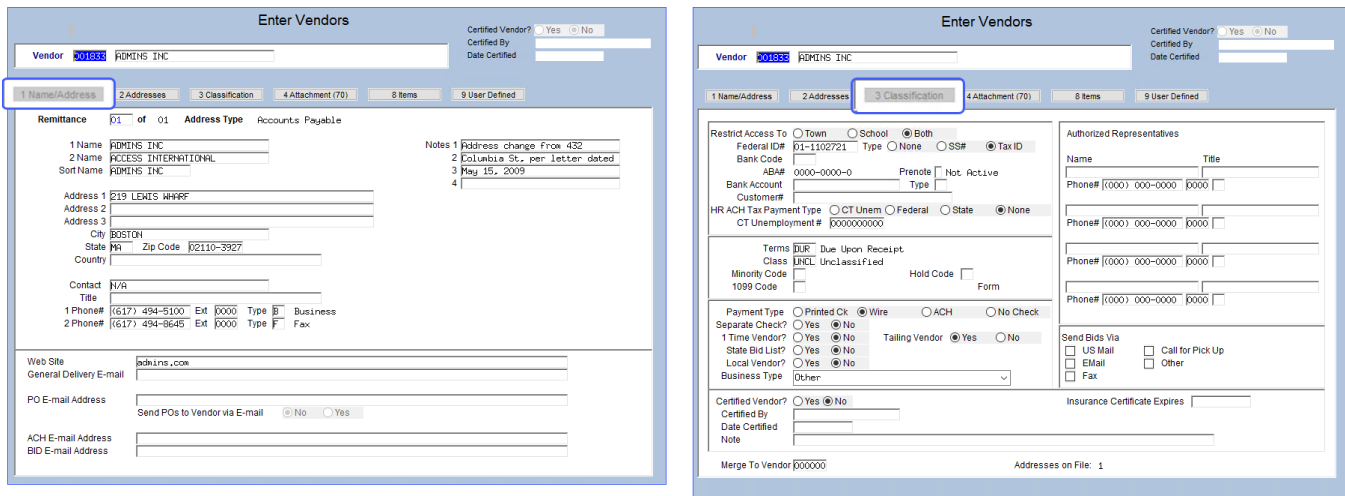


Figure 3 Changes made on the above screens will be logged

Remit	Change	Date	Time	User	Field	From/To
00	17-Apr-2023	17:00	THERESA	Default Check Type	N	W
00	17-Apr-2023	17:00	THERESA	Default Check Type	W	N
00	17-Apr-2023	17:00	THERESA	Default Check Type	W	W
00	17-Apr-2023	16:59	THERESA	Tailing Vendor Flag		Y
01	01-May-2023	16:33	THERESA	Second Name		ACCESS INTERNATIONAL

There are two buttons on the left side of the Field Logging screen. The **[1 Excel]** button will display an Excel report of the currently selected vendor field changes.



	B	C	D	E	F	G	H	I
1	Name	Remit	Change-Date	Time	User	Field	Old	New
2	ADMINS INC	00	17-Apr-2023	17:00	THERESA	Default Check Type	N	W
3	ADMINS INC	00	17-Apr-2023	17:00	THERESA	Default Check Type	W	N
4	ADMINS INC	00	17-Apr-2023	17:00	THERESA	Default Check Type		W
5	ADMINS INC	00	17-Apr-2023	16:59	THERESA	Tailing Vendor Flag		Y
6	ADMINS INC	01	01-May-2023	16:33	THERESA	Second Name		ACCESS INTERNATIONAL
7								

There is also an Edit List available from the Field Logging screen. Run the [2 Edit List] as PDF or Excel, and optionally filter the edit list by specifying up to nine vendor numbers, providing a date range, or restricting the edit list to a single user. Sort the edit list by Vendor Number, Change User, or Change Date.

Figure 4 Edit List shows vendor number, name, change date & time, change user, field, and “old” & “new” values

[ADM-AUC-AP-1202]

4 Help Reference Library & ADMINS Website Updates

Added the following new or updated content to the Help Reference Library and the [ADMINS.com](https://www.admins.com) website.

4.1 New Content in the Help Reference Library

PO Processing PO-105 PO Types, Encumbrances, & How Payments are Processed [Updated]

4.2 New Content on ADMINS.com

[Encumbrances, How Payments are Processed, & PO Types](#) [Available on the **ADMINS.com** website]
[Maintaining Email Distribution Lists](#) [ADM-AUC-DEMO-47]
[Attachments in AUC](#) [New]
[Printing to the Local Printer](#) [New]