Purchase Orders
Release Notes   June 2023

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]

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

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.
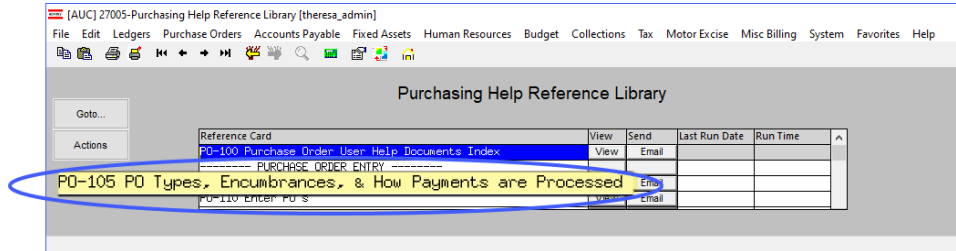

[HVMA-SUP-SAPLAUC-64]

2   Questions About How POs are Paid?

Please read the updated document, <u>PO-105 PO Types, Encumbrances, & How Payments are Processed</u> 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.

[ADM-AUC-DOC-228]

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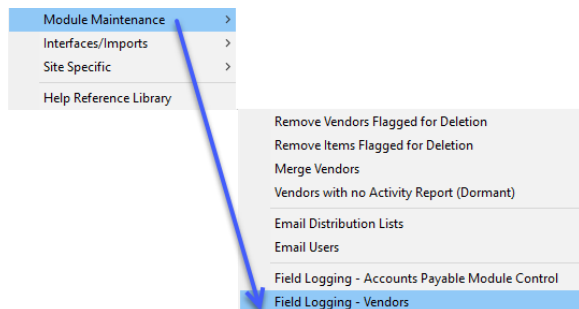
ADMINS added field logging to the Enter Vendors screen. This means that when changes are made to a vendor record, there is an audit trail. To access the information, from the menu, select:

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Purchase Orders ▶ Module Maintenance ▶ Field Logging – Vendors
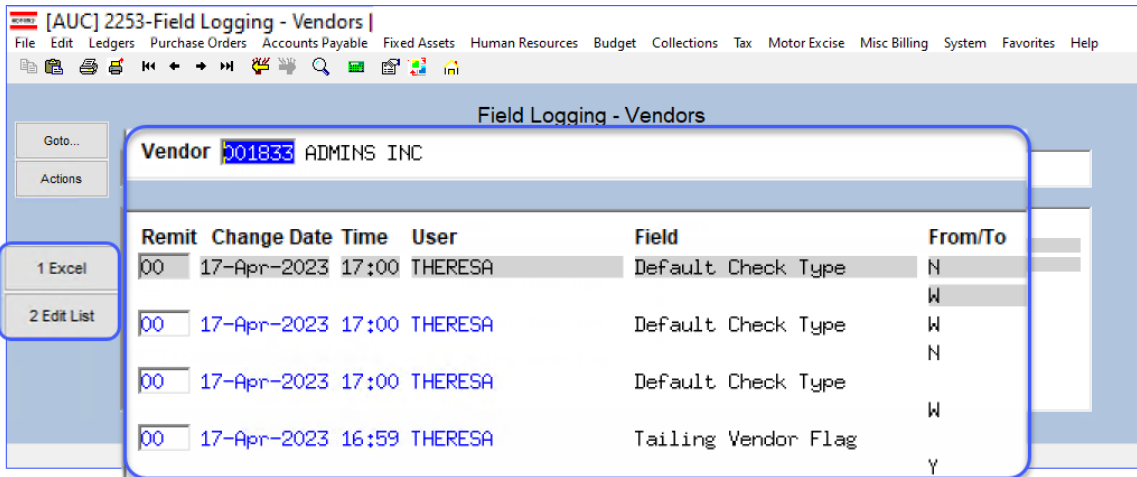
Figure 2 The Field Logging – Vendors screen shows who, when, and what was changed

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

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.

```
2254-APPORVENFLG.REP                                                                    Page 1
                                                Town of Admins
                                           Field Logging Report - Vendors
====== ============================ ===== =========== ===== ==================== ==================================== ============
Vendor Name                         Remit Change Date Time  User                 Field                Value
====== ============================ ===== =========== ===== ==================== ==================================== ============
001833 ADMINS INC                   00    17-Apr-2023 17:00 THERESA              Default Check Type   Old: N
                                                                                                      New: W
001833 ADMINS INC                   00    17-Apr-2023 17:00 THERESA              Default Check Type   Old: W
                                                                                                      New: N
001833 ADMINS INC                   00    17-Apr-2023 17:00 THERESA              Default Check Type   Old:
                                                                                                      New: W
001833 ADMINS INC                   00    17-Apr-2023 16:59 THERESA              Tailing Vendor Flag  Old:
                                                                                                      New: Y
001833 ADMINS INC                   01    01-May-2023 16:33 THERESA              Second Name          Old:
                                                                                                      New: ACCESS INTERNATIONAL
-----------------------------------------------------------
Selection Legend:
-----------------------------------------------------------
                Count: 5
                Sorted: Vendor,Remit,Change Date/Desc
                Vendor: 01833
```
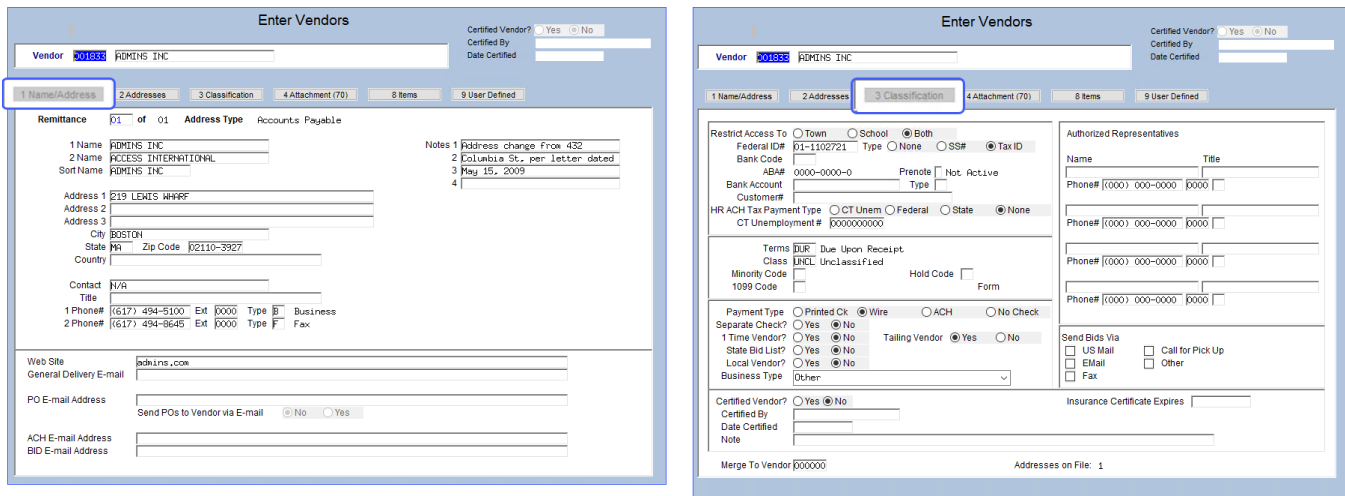
Figure 4 Edit List shows vendor number, name, change date & time, change user, field, and "old" & "new" values

[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 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]