

The 2016 release of SpendMap (version 14) includes more than **30 new features and capabilities** to help you slash paperwork, control spending and cut costs.

Below are our “top 10” new features. For more detail on each feature as well as a complete list of all new features and capabilities, please see the Update Documentation on Pages 5-29, below.

## Top 10 Picks

### 1) Windows 10

All front end clients now support Windows 10, including the Rich Web Client, e-Series Mobile Website and the Windows/desktop version.



### 2) Excel-Based Reports

You can now export your report data to Excel for easy analysis. The existing PDF (printer friendly) reports are still available, as is the previous Export Any Table utility.



You can also add fields to the Excel-based reports if you need more information than the standard/base reports. For more details, check out this [video on Excel-based reports in SpendMap](#). Don't forget to Like and Share!

### 3) e-Series Mobile Website

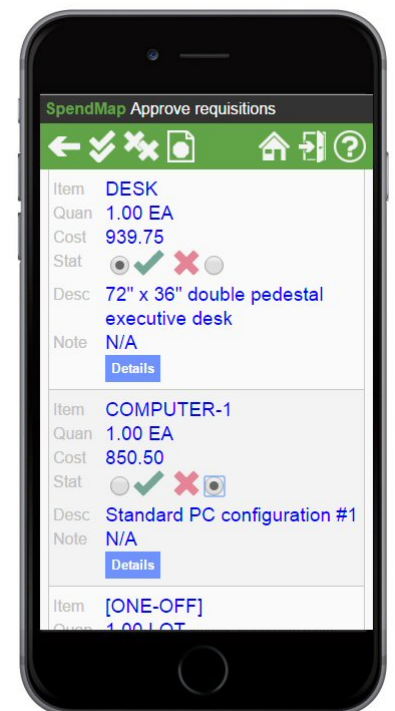
It seems that the e-Series “thin web client” is pretty popular these days. Ease-of-use aside, the e-Series is being used more often for Mobile access using Smartphones and Tablets.

So we made various improvements to make the e-Series work better on today's modern Smartphones and Tablet computers, and rebranded it to “e-Series Mobile Website” to better communicate its primary role. Please note, however, that the e-Series still works well on your PC.

In addition to new features (please see full Update Docs, below), you will notice a more modern look overall, and we reformatted the Handheld/Smartphone UI, eliminating the pinching/zooming of earlier versions.

Here's a sample screen shot ->

There is also a new, mobile-responsive, Universal Login Page that will auto-detect the device type and display the appropriate option for each device, so you



can now deploy a single URL/website for your users, regardless of their device.

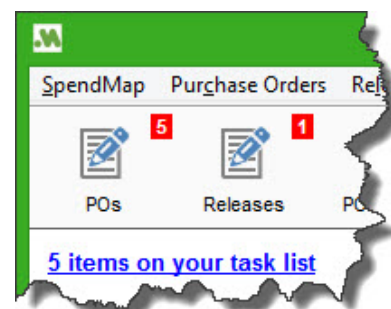
We're also thinking about developing native iOS and Android apps but the jury is still out as some of you told us that you prefer "mobile websites" like the e-Series over dedicated apps, since mobile websites eliminate the need to install and update apps on each device.

Please try out the improvements that we made to the e-Series but also please feel free to send us your thoughts about whether you would prefer iOS and Android-native apps for the functionality currently available in the e-Series.

#### **4) Toolbar Buttons - Document Waiting Notifications**

We added small, red "Document Waiting Indicators" to let you know how many pending documents/transactions are in each of your Work Areas.

It might seem like a small thing but it's really nice to be able to see where your pending documents are, without having to actually go into each Work Area or visit the User Task List.



#### **5) Direct/Tight Integrations**

SpendMap now supports direct integration with QuickBooks, Sage 300, and Dynamics GP to pass approved invoice transactions to the A/P system for processing.

We now also support these direct integrations in our On-Demand/SaaS version (previously direct integration was only available in SpendMap On-Premise).

As always, our batch/file imports and exports can still be used to share data with other systems.

#### **6) PunchOut Module**

PunchOut suppliers are now listed in the body of the e-Series Product Sourcing Page for easier access.

You can also (optionally) display supplier's category/classification, to help users pick the best PunchOut supplier.

Finally, you can now Punch-Out to Amazon for Business (Amazon B2B) to shop on this popular site from within SpendMap.

#### **7) Auto-Update Exchange Rates from the Web**

SpendMap now integrates with Yahoo! Finance to automatically update currency exchange rates, eliminating the need to manually update the Rate Field in the Exchange Rate Master File on an ongoing basis.

## 8) Item and Supplier Notes and Attachments

We moved the [Notes] folders/tabs in the Item and Supplier Master Files to a button at the bottom of the screen to be more consistent with other areas, and we added File Attachment capabilities while we were at it.

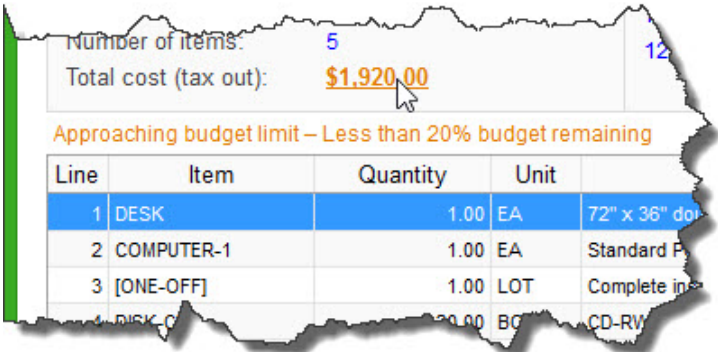
## 9) Cost Center Budgets

We've made many improvements to the budget tracking in SpendMap, to provide better feedback and controls in the various Work Areas where users enter new documents and transactions.

You can now specify a "threshold" (e.g. 20% of budget remaining), at which point SpendMap will start warning users when they are approaching the budget limit, with attention-getting, color-coded labels.

For example, while entering new Requisitions and Purchase Orders, you will see **green**, **yellow** or **red** messages, and you can click-through the hyperlinks to see full Budget Status details.

And just as a reminder, you can also prohibit users from processing transactions that will exceed budget, using the settings in Cost Center History/Budget Settings.



Number of items:		5	12	
Total cost (tax out):		\$1,920.00		
Approaching budget limit – Less than 20% budget remaining				
Line	Item	Quantity	Unit	
1	DESK	1.00	EA	72" x 36" dot
2	COMPUTER-1	1.00	EA	Standard P
3	[ONE-OFF]	1.00	LOT	Complete in
4	DISK-C	1.00	BO	CD-RW

Finally, we also improved the **Cost Center Budget Report**, which now has an option to include the details of each transaction (PO, Req, Invoice, etc.) that went into the total amount allocated to each budget line.

## 10) Other Good Stuff

OK, we're cheating a little bit on our "Top 10 List" but there's so much more good stuff that we didn't want to leave out...

- New report listing all system settings in one place.
- User session timeout feature in Rich Web Client.
- European number formatting (i.e. 123.456,78 vs. 123,456.78).
- You can now select specific fields that will trigger a re-approval when Requisitions are modified during the approval process. For example, perhaps changing the internal notes or attachments isn't important to you, while a price/value change would likely trigger a re-approval.
- Locked Master File codes can now be hidden/removed from Look-up lists.
- Faster/easier setup of User-Definable Menus with improvements to the User Menu Group feature.

## v12.65 – v14.16 (2016 Release)



- When e-mailing Purchase Orders to suppliers, the PDF attachment filenames now include the PO number(s) and you can optionally specify a prefix for the PDF filenames, such as your company name (e.g. ABC-Company-PO-12345.PDF).
- Even more good stuff in the full Update Docs, below...

## Full List of Enhancements by Module

<b>Main (Purchasing ) Module and system-wide features</b>	<b>Page 6</b>
<b>Invoice Approval and A/P Interface Module</b>	<b>Page 20</b>
<b>Requisitions and Approvals</b>	<b>Page 22</b>
<b>Request for Quotation (RFQ)</b>	<b>Page 24</b>
<b>Asset Management</b>	<b>Page 25</b>
<b>PunchOut (e-commerce integration)</b>	<b>Page 26</b>
<b>E-Series Thin Web Client</b>	<b>Page 27</b>

## Main (Purchasing ) Module and system-wide features

Version : 12.68  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **EXTENDED DESCRIPTION**

The "Ext. Desc." (ie. extended description) column has been removed from the various browse/grid lists throughout the system and is now available by hovering your mouse over the description itself. If an extended description exists, "..." will be added to the end of the description indicating that additional text exists.

-----

Version : 12.68  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **NOTES IN SUPPLIER MASTER FILE**

The Notes tab in the Supplier Master File has been converted to a Notes button to be compatible with the system-wide notes functionality. This also includes the ability to attach files to the supplier master file record (for internal use only).

-----

Version : 12.68  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **NOTES IN ITEM MASTER FILE**

The Notes tab in the Item Master File has been converted to a Notes button to be compatible with the system-wide notes functionality. This also includes the ability to attach files to the item master file record (for internal use only).

-----

Version : 12.69  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **HIDING LOCKED MASTER FILE CODE**

A new setting has been added in the Setup System > Master File Settings > Miscellaneous Master File Settings area as:

"Display option for locked master file codes"

This setting offers two options as follows:

The first option will display locked master file codes when users perform lookups but those locked codes cannot be used for the creation of new documents or new transactions (this is the same functionality as the previous version).

The second option will hide locked master file codes throughout the system (this is new functionality) with the exception of the following areas:

- The master file setup area
- Locking/unlocking master file codes
- Managing master file catalogs

It should be noted that, if you use this new setting to hide locked codes, lookup lists will not include the vertical scrollbar used to navigate the master file records but will include a <Previous Page> and <Next Page> button instead since filtered lists cannot include scrollbars.

-----  
Version : 12.81  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **APPLICATION ICONS**

All application images/icons have been updated to the new MicroSoft Office 2013 theme.

-----  
Version : 12.82  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **COPYING DOCUMENT TEMPLATES**

When copying a document template to create a PO, Purchase Requisition, RFQ or Item Requisition (excludes the e-Series web interface), the system will now allow the user to select individual lines items from the template to include on the new document, instead of including all lines. For backwards compatibility, all lines will initially be selected so all you need to do is select the <Done> button if you want all line items, as before.

-----  
Version : 12.83  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **UPDATE EXCHANGE RATES FROM WEB**

A new menu option is available as...

Master File > Tax and exchange rates > Update currency exchange rates from the web

...which will update all SpendMap exchange rates with current rates available on the web (from Yahoo Finance). In order to use this feature, SpendMap requires access to...

<http://query.yahooapis.com/v1/public/yql>

There are three options available to use this feature:

1. Run the menu option manually, as required.
2. Setup a scheduled unattended process to run this utility daily so that rates will be updated automatically.

Note: Third party web services do not allow for "excessive" use of their services. Therefore, if you use this option, please only run it once or twice a day so that you do not violate their usage rules.

3. A new setting titled "Exchange rate update option" has been added to Setup system > User defined terminology and settings > User defined field defaults settings (just below the landed currency code). When selected, SpendMap will automatically update exchange rates from the web once per day. This will occur whenever a user launches a menu option. Regardless of the success or failure to update exchange rates, this will only be done once per day so as not to impact users in the event of a problem - In the case of a failure, the user who initiates this process will be notified and a System Alert Log entry will be posted.

Note: To use this feature, the SpendMap landed currency code needs to be established in the User Defined Field Defaults. Also, if the ISO currency code is not entered in the SpendMap exchange master file, then the master file code itself will be used - If the master file code is not a valid ISO currency code, the rate will not be updated and an error will occur.

DISCLAIMER: This service is provided by a third party (Yahoo Finance) and is provided as-is without a warranty as to the accuracy, availability or timeliness of the information provided.

-----  
Version : 12.83  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **DASHBOARD NOW USING .NET 4.5.2**

The SpendMap Dashboard module now targets Microsoft .NET version 4.5.2.

.NET 4.5.2 will run on Windows desktop versions from Vista and up, and Windows Server 2008 SP2 and up. In most cases, .NET 4.5.2 will already be installed on these Windows versions. However, if it is not, the Dashboard module will not run and you will need to download and install .NET 4.5.2 on the affected machines.



---

Version : 12.83  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **NUMBER FORMAT OPTIONS**

A new setting has been added to the User Defined Field Settings titled "Number format". This setting allows you to specify one of two number formats as follows:

1,234,567.89 (default)  
1.234.567,89 (new option)

You can also specify this on a per-user basis in the User Master File if you are using SpendMap in a global context. However, a few areas of the system embed numeric data in stored blocks of text (eg. PO change order log available in View PO Status). In this case, the numeric values will be formatted in this text block based on the number format that was active at the time the data was saved and will not change when later displayed/printed based on the setting that is then active at that time. If this will be a problem for you, then it is recommended that you do NOT change this setting on a per-user basis in the User Master File and only set it globally in the User Defined Field Settings.

---

Version : 12.85  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **RICH WEB CLIENT - USER SESSION TIME-OUT SETTING**

A new setting has been added to time-out inactive users of the Rich Web Client. The new setting "User session time-out" can be found in the [Settings] folder/tab in:

PURCHASING > Setup system > Rich Web Client

Note: A similar setting is also available for the e-Series Thin Web Client, which can be found in:

PURCHASING > Setup system > e-Series thin web client > Settings

When a time-out value is specified, rich web sessions will be terminated if inactive for this amount of time (in minutes), thereby releasing the user's license for others to use. Please note, however, that it is possible that there are no concurrent-user licenses available when the user attempts to resume their work in SpendMap, and so they may need to wait. Setting this value to zero will disable this feature so that users will never be timed-out (same functionality as the previous version). The time-out feature is ignored/disabled for users who have a license reserved with the applicable setting in the [Settings] Folder of the User Master File.

It is always best if users exit SpendMap by closing their browser

session when at the Main Menu of SpendMap or by selecting the menu SpendMap > Exit System, which will end their session and release their user license. When users close their web browser when on a data entry page/screen or otherwise when NOT at the Main Menu, their sessions remain active on the server (ie. their user license remains in use) and they can resume working where they left-off when they log back into the system.

NOTE: The use of this time-out feature may result in loss of user data if the user has done work (eg. entered data on a page/screen) but has not saved their work yet and their session times-out and is terminated.

Also, it is important to note that typing data into a field may not necessarily be considered as "activity", and so, if you establish a short time-out period, users may not be able to save their work (if their session times-out before the next activity). Activity, is defined as any interaction that the user's session has with the web server. When using the Rich Web Client, you can see when the web server is being accessed by a "Loading..." indicator in the top-right corner of the browser window. In general, activity occurs by selecting a menu option, clicking a button or moving the cursor off a field that requires validation. By contrast, if the user is typing a lot of text into a single field (eg. typing in the Description Field on a PO), the web server is not being accessed while they type.

Therefore, when considering a time-out value for this setting, do not set the time-out period too low, or risk losing user data. And again, please do train your users to exit the system properly whenever possible.

Finally, please note that, while the majority of the areas of the system support this feature, there are a few areas in which it is not possible to terminate a user's session, in which case their sessions will remain active regardless of this setting.

-----  
Version : 12.85  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **PO BATCH ORDERING**

Documents added automatically to users' PO batches that do not have the PO number auto-assigned will now be listed at the top of the batch in source document number order. For example, if requisitions are built into POs (without assigning the PO number), these new POs Will be displayed at the top of the PO list, ordered by requisition number. As soon as the PO number is assigned, the document will then be listed in PO number order below any new documents above.

-----  
Version : 12.86

Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **MANAGE SPENDMAP SERVICES**

A button has been added to the View Active Users utility as "Start all services" and "Stop all services" which allow you to manage the various SpendMap services (ie. e-Series, e-mail server and fax server, when applicable) from within this utility. This can be helpful when performing certain maintenance tasks in SpendMap that require all database tables to be closed-down.

This button is only available when you have one or more of these services installed and only for SpendMap level 9 users.

If you use this feature on a workstation/server other than where the services are installed, the Windows user associated with that session must have rights to access/control services on the remote computer. If the user does not have those rights, the operation will fail.

In the event that this utility does not properly start/stop the services, you will have to perform this operation through the Windows services manager manually.

-----  
Version : 12.86  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **TOOLBAR NOTIFICATION LABELS**

Red labels have been added to the main menu toolbar buttons indicating how many items are currently in the area corresponding to that toolbar button (eg. the "POs" toolbar button shows the number of POs in your PO work area).

Note: These labels will only be displayed if the user has the "Enable task list reminder in main menu" setting enabled in the User Master File.

-----  
Version : 12.87  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **BUYER PERFORMANCE STATISTICS**

The Buyer Performance utility has been modified to now allow non-buyer users (ie. users not setup as a buyer in the User Master File) to be included in the buyer performance statistics. A third filter option has been added to the Buyer Performance Report to allow only buyers (as setup in the User Master File) to be included on the report which is the same user filter as the previous version.

It should be noted that the performance statistics are now calculated based on any users who previously processed purchase orders and not only those who are setup as buyers in the User Master File so this may

affect the statistics that are calculated compared to the previous version if you have users who process purchase orders but are not setup as a buyer in the User Master File.

-----

Version : 12.89  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **UPDATE USER MENU FROM MASTER**

When using the Update User Menus From Master Menu Group utility, you can now select which of the master menu groups to include in that update process. Selecting the <All> button will include all groups which is the same functionality as the previous version.

-----

Version : 12.94  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **EXCEL REPORTS**

The report print options have been consolidated. In addition, a new report export to Excel option is now available for most reports in the system.

The following are the new report print options:

- "Printer" (Windows/desktop version)

Same as before - Allows you to select a Windows printer.

- "View as Adobe PDF file" (Windows/desktop version)

This option replaces the previous "Disk (PDF) file" and "Preview (report to the screen)" options. When selecting this option, the report will be displayed on the screen. If you then want to save the report to a file, select the "Save as" option and specify the folder and filename.

- "View as Adobe PDF file" (Ajax rich web version)

This replaces the previous "Printer, preview or file (using your web browser)" option and is the same functionality as the previous version.

- "View as Excel spreadsheet file"

This is a new option which will export the report to a Microsoft Excel spreadsheet file. This is ideal if you need to analyze, sort or manipulate the data. When selecting this option, the report will be

displayed on the screen. If you then want to save the report to a file, select the "Save as" option and specify the folder and filename.

Note: You must have Microsoft Excel installed on your computer to use this option.

Some reports offer two style options as follows:

"SPREADSHEET STYLE" is ideal for sorting/analyzing data. However, to allow this, common data (ie. the data that is the same for multiple rows) must be repeated so that the data can be properly sorted. This makes it slightly more difficult to read.

"REPORT STYLE" is easier to read, but the data cannot be sorted. This style offers the following additional features over that of the SPREADSHEET STYLE:

- More white space
- Double-spacing
- Common data is listed once instead of being repeated
- Sub-totals (where available)
- Blank fields are denoted with a period "."

Note: If you have any custom enhancements to existing reports or entirely custom reports, these custom enhancements will not be available for these Excel reports. Please contact SpendMap Client Services for a price quotation if you would like these custom changes added to the new Excel reports.

You can also include related master file data (eg. the description for a code included on the report) from other tables on these Excel reports as follows:

1. Select the "Customize Excel report" menu option from the "Reports" menu. This will put SpendMap into customization mode.

Tip: Use the <END> key to disable this mode.

2. Select and run the report you would like to customize.
3. Once the Excel report is displayed, go back to SpendMap.

Tip: Keep the Excel report open for reference while you customize the report in SpendMap.

4. If this Excel report is comprised of multiple reports (ie. multiple sheets), you will be prompted to select which report you would like to customize. You can customize all included reports, one at a time. If there is only one report/sheet for this report, this prompt will not be displayed.
5. You will then be presented with a list of master files that are related to this report. Select the master file that you would like to include additional information from. You can select multiple master files, one at a time.

6. Once you select a master file, you will be presented with a list of available fields from that master file. Select the fields that you would like to include on the report - These fields will be inserted to the right of the corresponding master file column on the report.
7. When done, save your changes and return to the main menu. The next time you run that report, the fields that you selected will be included on the report.

When you save the customizations, you will have the option to save them for yourself only or shared by all users. When the report is run, if the user has their own customizations and there are also shared customizations, the user will be prompted to select which customizations to use for that report.

- "e-mail as Adobe PDF file"

This is the same as the previous "e-mail" option.

- "e-mail as Excel spreadsheet file"

This is new and allows the new Excel report file to be sent by e-mail from within SpendMap (if you have the e-mail module included in our system). See above for full details.

- "Fax"

Same as before - Allows the report to be faxed from within SpendMap (if you have the fax module included in your system).

-----  
Version : 12.97  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **EXPORT FILES NOW USE CSV EXTENTION**

When exporting text files that are comma/quote delimited, the default extension will now be ".CSV" instead of ".TXT".

Note: If you are currently performing any exports to other systems (eg. A/P invoice interface), you may need to adjust the target system if you are using a comma/quote delimited text file export format.

-----  
Version : 12.97  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES

Regarding: **E-MAIL ATTACHMENT FILE PREFIX**

A new setting has been added to the e-mail settings as "Attachment prefix for external messages". If this setting is used, the value will precede the filename used when sending POs, RFQs and Releases to suppliers for attachments in e-mail messages.

The purpose of this setting is to specify a unique name so that files can be easily identified by suppliers as originating from your company. For example, if your company name is "Abc Company Limited", you could specify "AbcCompany" for this setting and the file name used for a PO attachment would look like this in the supplier's e-mail program:

AbcCompany-PO-1234567-20150928-1015.PDF

Note: This setting must only include characters that are valid for filenames and cannot include spaces. SpendMap will tell you if you used an invalid character when specifying this setting.

The date and time are also included in the filename to increase the chance that the filename will be unique in the supplier's e-mail program, especially if you were to send a revision of this PO to the supplier (ie. if the date and time were not included, the supplier's e-mail program may append a number to the filename to make it unique but also making it confusing for the supplier since it would look like a different PO number).

If you do not use this new setting, attachment filenames will be numerically sequenced, as before (eg. 12345678.PDF).

-----  
Version : 12.98  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **BUDGET STATUS INDICATOR**

The primary areas of the system (eg. document entry) will now display document dollar amounts using color as an indicator of the document's budget status (if you have the budget feature enabled in SpendMap) as follows:

- Green - The document is within established budgets.
- Orange - The document is approaching the budget limit (this limit can be set as a percent remaining using the new "Start warning user when..." setting in the cost center budget settings).
- Red - The document will exceed established budgets.

Note: This indicator is a snap-shot of the budgets at that moment in time and does not necessarily mean that the indicated status will apply at the time the document is processed. For example, if you are entering a new document and this new indicator is

green indicating that the budgets are available for this document, the document may still exceed the budgets at the time of processing if another document for those same budgets was processed before the current document is processed.

In addition, some of these areas (where available) will also offer access to view the budgets using a link.

-----  
Version : 13.00  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **BLACK CATS AND BROKEN MIRRORS**

We decided to skip version 13.00 and move right to 14.00, just in case any of you are superstitious... Better safe than sorry! ;-)

-----  
Version : 14.04  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **COST CENTER BUDGET DETAILS**

The Cost Center budget report now offers the option to include the transaction details that make up the budget summary and will be listed below each budget item on the report.

-----  
Version : 14.04  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **ITEM LOOKUPS WHEN CREATE DOCS.**

A new setting has been added to the PO Entry Settings and the Requisition Entry Settings (applies to Purchase Requisitions only) as "When selecting items to add to document" which includes the following options:

1. "Item lookup shows all items from all suppliers (user can search/filter by supplier as required)"

All items are displayed regardless if they are supplied by the current supplier or not. The user can search/filter by supplier as required. This is the default behavior and is the same as the previous version.

2. "Item lookup shows all items from all suppliers and items for the current supplier are highlighted"

All items are displayed regardless if they are supplied by the current supplier or not, but the items supplied by the current supplier are highlighted in the lookup list. The user can also



search/filter by supplier as required.

3. "Item lookup shows only items for the current supplier"

Only items supplied by the supplier will be displayed in the lookup list and the user will not have access to any other items.

It should be noted that, if you use this option to only display the supplier's items, lookup lists will not include the vertical scrollbar used to navigate the master file records but will include a <Previous Page> and <Next Page> button instead since filtered lists cannot include scrollbars.

Also note that, for very large lists of items (eg. many thousands of items per supplier), the responsiveness of item lookups in PO and Purchase Requisition entry may vary depending on the database server that you use and the speed of your network.

-----  
Version : 14.08  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **REPORT LISTING ALL SYSTEM SETTINGS**

A new menu option titled "Report of all system settings" is available in the Purchasing/Main module's "Setup System" area. This report will list all system settings for the entire system which is useful for SpendMap Technical Support when assisting with your setup of the system and can also be used by you to audit your SpendMap settings conveniently since they are available in a single location for review.

This report will include all settings as well as the corresponding system labels included on each settings page, and will be formatted similar to the actual settings pages themselves.

Note that this report is considered a maintenance operation and will suspend all active users while the report is being generated. This is necessary to ensure that the report will be able to access all applicable areas of the system.

-----  
Version: 14.09  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **SPENDMAP NOW USING .NET 4.5.2**

This version of SpendMap now targets Microsoft .NET version 4.5.2. This applies to and will affect the following areas of SpendMap:

- Ajax Rich Web interface (on the web server)
- Dashboards

.NET 4.5.2 will run on Windows desktop versions from Vista and up, and Windows Server 2008 SP2 and up. In most cases, .NET 4.5.2 will already

be installed on these Windows versions. However, if it is not, these areas of SpendMap will not run and you will need to download and install .NET 4.5.2 on the affected machines.

## IMPORTANT

If you are using the Ajax Rich Web interface, the IIS application pool for the SpendMap Ajax website needs to be adjusted as follows:

.NET Framework version: 4.0  
Managed pipeline mode: Integrated

Instructions can be found at...

<http://technet.microsoft.com/en-us/library/cc754523%28v=ws.10%29.aspx>

---

Version: 14.11  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **LANDED CURRENCY SYMBOL**

A new setting has been added to the User Defined Field Defaults settings titled "Landed currency SYMBOL (for reporting)". If specified, this symbol will display with landed dollar amounts throughout the system (where available). If this setting is not specified and the landed currency CODE is specified, the currency symbol associated with that currency code will be used instead.

---

Version: 14.13  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **BROWSER SUPPORT**

SpendMap is now compatible with the new Microsoft Edge browser that ships with Windows 10.

Also, with Microsoft discontinuing support for Internet Explorer versions earlier than version 11, SpendMap now only supports Internet Explorer versions from 11 and up.

SpendMap is also compatible with the FireFox and Chrome browsers.

---

Version: 14.13  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **MOUSE WHEEL SUPPORT IN RICH WEB CLEINT**

Mouse wheel scroll support has been added to browse lists in the Rich Web Ajax version (was already available in the Windows desktop and

e-Series thin web versions).

When scrolling within the current list view, you can move one or many rows, depending on the speed that you scroll and the type of mouse that you are using. When scrolling beyond the current view (ie. past the top or bottom), the list will move 5 rows at a time in an accelerated mode to reduce communication with the server. Once the desired row is within view, you can then scroll to that row, one row at a time, as usual.

---

Version: 14.13  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **MAIN MENU SIDEBAR DISABLED**

The Rich Web's main menu navigation sidebar (which appears to the left of the main menu window and offers a different method of navigating the main menu options) has now been disabled by default since most users prefer to use the main menu itself. If you would like to re-enable the sidebar, you can do this using...

Setup system > Workstation configuration settings

...and change setting #18. The sidebar will then be enabled for all users the next time they login.

---

Version: 14.16  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Subject: **UNIVERSAL LOGIN PAGE**

A new universal login page is now available which allows you to login to the Ajax Rich Web application, e-Series website, e-Series tablet interface and e-Series smartphone interface all from a single login page. This new login page will automatically sense which device the user is logging in with and will direct them to the appropriate interface. This allows for a single URL to be published for SpendMap regardless of the device, which simplifies deployment.

In order to use this new login page, both your Ajax Rich Web and e-Series websites must be setup under a single website, where one is the parent site and the other is the child site. Please contact SpendMap Technical Support for more details if you are interested in using this new login option.

Note that the existing dedicated login pages that you are currently using are still supported and will continue to function as before.

## Invoice Approval and A/P Interface Module

Version : 12.68  
Module : INVOICE  
Regarding: **QUICKBOOKS INTEGRATION**

Due to extensive changes to the QuickBooks direct-integration settings in this new version, if you are performing a direct-integration to QuickBooks, you will need to setup your A/P interface settings again in SpendMap.

-----

Version : 12.74  
Module : INVOICE  
Regarding: **INVOICE CANCELLATIONS TO A/P**

A new setting has been added to the A/P invoice interface settings to allow invoice cancellations to be sent to A/P as either cancellations or as credit notes. Typically, a cancellation will remove/delete the original invoice transaction while a credit note will leave the invoice as-is but will post a corresponding credit transaction. The availability of either option is dependent on your A/P system.

If you are using the batch/file interface option, then "credit note" is the only available option (if you are including invoice cancellations in your interface). If you are using the tight integration option, then this new setting will default based on the capabilities of your A/P system.

Note: The credit note option will only support invoice cancellations for invoices entered AFTER this setting has been enabled - The cancellation of old invoices will have to be handled manually in your A/P system.

-----

Version : 12.88  
Module : INVOICE  
Regarding: **ACCOUNT CODES FOR TAXES TO A/P**

Two fields have been added to the Tax Master File for the G/L and Cost Center code to be used for that tax code when taxes are sent separately to your A/P system during the invoice interface. These new codes will override those in the A/P Interface Settings if setup for the tax code. These new codes will only be available if your SpendMap A/P interface option allows for taxes to be sent separately, otherwise they will be disabled.

Note that these are SpendMap account codes - If the codes in your A/P system are different than those in SpendMap, you can setup the corresponding account codes from for your A/P system in the SpendMap G/L and Cost Center master files for the codes used here.

-----  
Version : 14.16  
Module : INVOICE  
Regarding: **DIRECT INTEGRATIONS**

SpendMap now supports direct integration with QuickBooks, Sage 300, and Dynamics GP to pass approved invoice transactions to the A/P system for processing.

We now also support these direct integrations in our On-Demand/SaaS version (previously direct integration was only available in SpendMap On-Premise).

As always, our batch/file imports and exports can still be used to share data with other systems.

## Requisitions and Approvals

Version : 12.68  
Module : REQUISITION  
Regarding: **APPROVALS FOR MODIFIED REQS**

A new button has been added to the requisition Miscellaneous Approval Rules and Settings as "Fields to consider as modifications". This button is available in conjunction with the setting "Reset approvals if requisition is modified during the approval process". If approvals are to be reset when requisitions are modified, this new button allows you to select which fields the system should consider when determining if the approvals should be recalculated and the requisition is to be sent through the approval process again. The default is all fields will be considered and is the same behavior as the previous version. However, you may choose to exclude certain fields (eg. a comment field) which, if changed, would not require the requisition to start the approval process over again.

-----

Version : 12.82  
Module : REQUISITION  
Regarding: **COPYING DOCUMENT TEMPLATES**

When copying a document template to create a PO, Purchase Requisition, RFQ or Item Requisition (excludes the e-Series web interface), the system will now allow the user to select individual lines items from the template to include on the new document, instead of including all lines. For backwards compatibility, all lines will initially be selected so all you need to do is select the <Done> button if you want all line items, as before.

-----

Version : 12.86  
Module : REQUISITION  
Regarding: **E-SERIES REQUISITION APPROVAL**

The drop list used in the e-Series web interface when approving requisitions has been changed to two radio buttons (one to accept and one to reject) to reduce the number of clicks needed when approving requisitions.

-----

Version : 12.97  
Module : REQUISITION  
Regarding: **E-SERIES - ADD MULTIPLE ITEMS TO CART**

Multiple items can now be added to the Shopping Cart as a single step

on the e-Series Product Sourcing page by entering a quantity for the required items and then using the <Add to cart> button to add the selected items to the Shopping Cart. You can modify the details of any of those items when viewing the Shopping Cart. As before, you can also add an item including the details by using <Enter details> button.

-----  
Version : 14.02  
Module : REQUISITION  
Regarding: **E-SERIES MOBILE APPROVALS REDESIGNED**

The e-Series mobile requisition approvals (accessed using the e-Series HandHeld.htm file) page design has been improved. As before, you can access this from most smart phone web browsers and requires nothing to be installed on the phone (ie. this is a web page, not an app).

## Request for Quotation (RFQ)

Version : 12.82  
Module : RFQ  
Regarding: **COPYING DOCUMENT TEMPLATES**

When copying a document template to create a PO, Purchase Requisition, RFQ or Item Requisition (excludes the e-Series web interface), the system will now allow the user to select individual lines items from the template to include on the new document, instead of including all lines. For backwards compatibility, all lines will initially be selected so all you need to do is select the <Done> button if you want all line items, as before.

-----

Version : 14.02  
Module : RFQ  
Regarding: **ADDING SUPPLIERS TO RFQ**

The method used to add suppliers to an RFQ has been changed. Instead of the pop-up prompt allowing "individual suppliers" or "suppliers within a supplier classification", the system-wide code selection utility will now be used which allows individual suppliers and groups of suppliers to be added to the RFQ in one operation as follows:

The <Add> button can be used to add individual suppliers.

The <Add multiple codes> button can be used to add multiple suppliers based on a variety of fields, including the supplier classification field as before.

The <Add codes from a catalog> button (when available) can be used to add all the suppliers from a specific supplier catalog.

These options can be used individually or in combination with one another.

-----



## Asset Management

Version : 12.90

Module : ASSET

Regarding: **MANUFACTURER ADDED TO ASSETS**

A field titled "Manufacturer" has been added to the Asset Master File and can be used to record the name/id of the manufacturer of the asset. This field is available in various areas of the Asset Module, where applicable.

-----

### **PunchOut (e-commerce integration)**

Version : 12.85  
Module : PUNCHOUT  
Regarding: **IDENTITY OPTIONS ADDED**

Additional fields have been added to the supplier Punchout settings in the Supplier Master File to allow for new identity options. In the previous version, only "DUNS" was supported. In this version, you can choose either "DUNS" (as before) or "Network id" (new) as the type of identity to use for Punchout with that supplier.

Note: If you choose "DUNS" for the "Your identity" field, the corresponding field will be disabled and will be defaulted to the DUNS number setup in the system's Punchout Settings.

-----  
Version : 12.85  
Module : PUNCHOUT  
Regarding: **SUPPLIER CLASSIFICATIONS**

A setting has been added to the Supplier Punchout Settings as "Include supplier class in Punchout link description" which includes the following options:

- "Never" (default option)
- "Include the PRIMARY classification CODE"
- "Include the PRIMARY classification DESCRIPTION"
- "Include ALL classification CODES"

This allows you to include the supplier's classification code(s) or description in the Punchout link description to help users decide which supplier to Punchout to. For example, you might have a supplier classification as "Office supplies" which, when included in the Punchout link description, makes it obvious what that Punchout option should be used for.

The classification will be included in brackets to the right of the supplier's name - For example...

[SUPPLIER CODE] Supplier Name (Classification)

Tip: Use lower/mixed case classification descriptions (ie. as opposed to all UPPER CASE) to reduce the amount of horizontal space required to display this additional information.

-----  
Version : 14.04  
Module : MAIN (PURCHASING) MODULE AND SYSTEM-WIDE FEATURES  
Regarding: **PUNCHOUT TO AMAZON**

The Punchout module is now compatible with Amazon for Business.

## E-Series Thin Web Client (mobile website)

Version : 12.68  
Module : E-SERIES  
Regarding: **PUNCHOUT**

The supplier Punchout links (if you are using Punchout) are now included directly on the e-Series Product Sourcing page (to the right of the item list) as a convenience for the user instead of having to click on the Punchout button/link as a separate step.

However, depending on the size of the browser window, these Punchout links may end up at the bottom of the page, below the items, if there is not enough room to the right. Therefore, the Punchout button/link at the top of the page remains in place as an alternate means of accessing these Punchout links.

-----  
Version : 12.81  
Module : E-SERIES  
Regarding: **E-SERIES BACKGROUND COLOR**

The e-Series background color setting no longer supports a wallpaper filename and now supports only a color id, either as an HTML color (eg. White) or as an RGB hex value (eg. #FFFFFF). The color will be defaulted to #F9F9F9 which is a slight off-white color to allow the white data entry fields to appear more prominent on the page.

-----  
Version : 12.85  
Module : E-SERIES  
Regarding: **CUSTOM HEADER NEEDS ADJUSTMENT**

If you are using the e-Series thin web client AND you are also using the custom header option to display your own header at the top of each e-Series page (ie. if PPWEB\HEADER.HTM exists in your system), then you will need to modify PPWEB\HEADER.HTM as follows:

The custom e-Series header must now exist within a <div> section and conform to the following rules:

1. It must include a "height:" element in pixels
2. If it includes "padding:", it must be the same on all 4 sides
3. The style must be included as part of the div definition
4. The "z-index" must be 99 (ie. to ensure it is always at the top)

The following is an example that will include a 60-pixel blue section with white font above the e-Series banner:

```
<div style="font-size: 16pt; font-family: Verdana, Arial, sans-serif;
```

```
font-style: normal; color: #ffffff; background-color: #0000ff;
height: 60px; vertical-align: middle; padding: 5px 5px 5px 5px;
z-index:99; position: fixed; width: 100%">
```

This is some text to display above the SpendMap e-Series banner

<br>

This is a second line

</div>

-----

Version : 12.86  
Module : E-SERIES  
Regarding: **REQUISITION APPROVAL**

The drop list used in the e-Series web interface when approving requisitions has been changed to two radio buttons (one to accept and one to reject) to reduce the number of clicks needed when approving requisitions.

-----

Version : 12.97  
Module : E-SERIES  
Regarding: **ADD MULTIPLE ITEMS TO CART**

Multiple items can now be added to the Shopping Cart as a single step on the e-Series Product Sourcing page by entering a quantity for the required items and then using the <Add to cart> button to add the selected items to the Shopping Cart. You can modify the details of any of those items when viewing the Shopping Cart. As before, you can also add an item including the details by using <Enter details> button.

-----

Version : 14.02  
Module : E-SERIES  
Regarding: **MOBILE APPROVALS REDESIGNED**

The e-Series mobile requisition approvals (accessed using the e-Series HandHeld.htm file) page design has been improved. As before, you can access this from most smart phone web browsers and requires nothing to be installed on the phone (ie. this is a web page, not an app).

-----

Version: 14.12  
Module: E-SERIES  
Subject: **SUPPLIER'S ITEM CODE**

The supplier's item code (from the Item Master File) is now included (in brackets) to the right of the internal item code on the e-Series Product Sourcing Page (if applicable). If the Product Sourcing Page is displayed for all suppliers (ie. "\*" for the supplier code), then the primary supplier's item code will be displayed. If the Product Sourcing Page is for a specific supplier code, then that supplier's item code will be displayed. The supplier code is also displayed for clarification as follows:

<Internal item code> (<Supplier code>: <Supplier's item code>)

---

Version: 14.12  
Module: E-SERIES  
Subject: **PRICE ON PRODUCT SOURCING PAGE**

A new setting has been added to the e-Series Settings as "Item catalog price option". This new setting allows you to select from one of two options for the price that is displayed for each item on the Product Source Page.

The first option "Item's standard cost" is the default value and is the same as the functionality in the previous version. The second option "Supplier's price" is new and will display the supplier's price for the item (in the supplier's currency) and will also include the freight and/or miscellaneous charges to the right of the price, if they exist.

The supplier's price that is displayed will either be the primary supplier for the item if all suppliers are included (ie. "\*" is entered for the supplier code on the Product Sourcing Page) or, if a supplier is specified, then that supplier's price will be displayed.

---

Version: 14.13  
Module: E-SERIES  
Subject: **POP-UP CALENDAR FOR DATE FIELD**

A pop-up calendar is now available for all date fields in the e-Series thin web client. JavaScript must be enabled in the SpendMap e-Series settings in order to have access to this feature.

---

Version: 14.16  
Module: E-SERIES  
Subject: **UNIVERSAL LOGIN PAGE**

A new universal login page is now available which allows you to login

to the Ajax Rich Web application, e-Series website, e-Series tablet interface and e-Series smartphone interface all from a single login page. This new login page will automatically sense which device the user is logging in with and will direct them to the appropriate interface. This allows for a single URL to be published for SpendMap regardless of the device, which simplifies deployment.

In order to use this new login page, both your Ajax Rich Web and e-Series websites must be setup under a single website, where one is the parent site and the other is the child site. Please contact SpendMap Technical Support for more details if you are interested in using this new login option.

Note that the existing dedicated login pages that you are currently using are still supported and will continue to function as before.

-----