

Product Updates

Purchase-to-Pay Release 26.3

Version:

Published version 1.0

13/10/2026

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1 Introduction

1.1 How to Use this Document

The product update offer brief, high-level descriptions of enhancements and new P2P features. They also include setup information, implementation tips to help you get started, and best practices to ensure your continued success.

2 How & When Features Become Available

Some features may affect all users immediately after the release goes live whilst other features require direct action by an administrator before users can benefit from the new functionality. Each feature listed within the release notes section will indicate the 'Availability' as either:

- Immediate
- Subject to Configuration

3 Browser Support

As a reminder, the latest version of the following browsers is supported:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

4 Release Highlights

This product update includes the following features:

- Apportionments Functionality Improvements in Main Search Screen including Column headers, Title Columns, and Search Criteria
- Buyer Requisition Improvements in Order Amendment including invoice address change
- Filtering and Search within the unconfirmed consolidated orders screen
- Default “fail-safe” rule to prevent auto authorisations
- Mobile token generation, removal of button

5 Technical Action Required – On Prem customers

As mentioned in a previous release, **due to changes to the internal signing of the executable, the new version of the Proactis Updater program must be manually installed to access the latest Proactis P2P updates when upgrading from versions prior to 25.1.** For hosted customers, this will be taken care of automatically.'

6 Enhancements

6.1 Apportionment Functionality Improvements in Main Search Screen including Column Headers: Auto-complete search results are corrupted when more than a single custom column is configured

Availability: Immediate

The enhancement focuses on the layout of the auto-complete search results drop-down when custom data columns are configured.

With 26.3, the auto-complete results are formatted correctly for every supported configuration:

- Zero, one, two or three custom columns display cleanly, with headers aligned to their data and no wrapping.
- Code and Title are always shown alongside any custom columns.
- The new layout takes effect without users needing to clear their browser cache.
- It applies everywhere the Nominal Apportionment auto-complete appears order creation, requisition creation, standalone invoice and credit-note creation, editing a requisition line or standalone invoice line during authorisation, and buyer sourcing

6.2 Apportionment Functionality Improvements in Main Search Screen including Title Column

Availability: Immediate

The enhancement focuses on making Nominal Apportionment searches use the column names each client has configured.

With 26.3, the configured labels are used consistently:

- Both the auto-complete search and the full search dialog show the Code and Title headers exactly as configured.
- This applies to order creation, requisition creation, standalone invoice and credit-note creation, editing lines during authorisation, and buyer sourcing.
- No browser cache refresh is needed to see the new headers

6.3 Apportionment Functionality Improvements in Main Search Screen including Search Criteria: Nominal Apportionment code - search dialog UI improvements

Availability: Immediate

The enhancement focuses on the usability of the Nominal Apportionment Code search dialog. Users can search on the built-in Code and Title fields plus any client-specific custom fields, and up to three custom fields can be shown in the results grid.

With 26.3, the dialog has an improved, more efficient layout:

- Vertical spacing has been reduced so the whole dialog fits on screen at the minimum supported resolution.
- All three custom fields are visible in the header section without scrolling.

The selected results are still displayed beside the matching search criteria, as before.

6.4 Buyer Requisition Improvements in Order Amendment including invoice address change - Invoice address permission on the *purchaser* role

Availability: Immediate

The enhancement focuses on giving system administrators control over who may change the invoice address when amending an order.

With 26.3, administrators can manage this from the PURCHASER role in Web-PMC:

- A new "Invoice Address" setting sits alongside the existing amendable-field settings and can be switched on or off per role.
- The setting defaults to off, so existing behaviour is preserved after upgrade until the permission is granted.
- When off, users see no option to change the invoice address on an amendment; when on, they can change it.
- Changes apply to amendments started after the setting is changed; sessions already in progress follow the normal permission-refresh behaviour.

6.5 Buyer Requisition Improvements in Order Amendment including invoice address change - Change the invoice address on an order amendment

Availability: Immediate

This enhancement focuses on letting buyers and purchasers correct the invoice address while amending an order, in the same way they can already change the delivery address.

With 26.3, users with the invoice-address permission can update it during an amendment:

- A "Change" control appears at the invoice address on the order amendment screen, styled like the delivery-address control.
- Users pick from the existing list of invoice addresses; free-typed addresses are not allowed.

- The new address is saved to the order header on save or submit and carries through to the purchase order and downstream documents such as invoices.
- Changing the invoice address does not trigger re-authorisation, and cancelling leaves the original address unchanged

6.6 Filtering and Search within the unconfirmed consolidated order screen - Sort, filter, and manage columns on the Unconfirmed Consolidated Orders screen

Availability: Immediate

The enhancement focuses on helping requisitioners and buyers work through the Unconfirmed Consolidated Orders list, particularly in organisations with several Buyer Pools and high order volumes.

With 26.3, the screen offers the standard grid toolbar and behavior:

- Clicking a column header (Order Number, Order Date, Buyer, Buyer Pool, Template, Value) sorts ascending, and clicking again sorts descending, with a single sort indicator shown.
- Dates sort chronologically and values sort numerically, ignoring currency symbols.
- Each column has an inline filter: free text for Order Number (which also matches supplier name), a date picker for Order Date, buyer and buyer pool filters, and minimum/maximum for Value.
- Filters combine (all must match), sorting applies across the full filtered result set rather than just the current page and clearing one filter re-applies the rest.
- Counts and pagination reflect the filtered results, a clear "no results" message replaces a blank grid, and columns can be managed from the toolbar Changing the invoice address does not trigger re-authorisation, and cancelling leaves the original address unchanged

6.7 Default "fail-safe" rule to prevent auto authorisations - Implement Guard Rule functionality in core product and ability to configure a guard rule in the Classic-PMC

Availability: Immediate

This enhancement focuses on stopping documents from being auto authorised by mistake.

With 26.3, a Template Authorisation Rule can be marked as a Guard Rule:

- An "Is Guard Rule" checkbox on the Template Authorisation Rule edit page in the Classic PMC flags the rule; it is typically the last rule in the set.
- If no one has manually authorised the document, the guard rule fires and routes it to the linked authoriser, which can be an individual, a pool or a group. If one or more people have already authorised it, the guard rule is system-authorised.
- It is normally an ALWAYS rule, but a condition such as a value threshold can be applied, so low-value documents can still auto-authorise if the client prefers.
- Authorisation summaries show guard-rule reason codes, and the option to show or hide system-authorised rules (previously only on orders) is now on every document type.

- It works across all documents handled by the authorisation engine: orders, requisition items and documents, standalone invoices, invoice discrepancies, post-match invoices, sales invoices, expenses and journals.

6.8 Mobile token generation button removed

Availability: Immediate

With this enhancement a change has been made from stopping new users from setting up the P2P mobile app, which is not supported on newer mobile operating systems.

With 26.3, mobile token generation is controlled by a feature toggle:

- With the toggle off (the new default), the "Generate token" link is hidden on the Manage your P2P settings page; the Revoke tokens link is still available.
- Existing users already logged in on older devices keep uninterrupted access until their current token expires, one year after it was generated.
- The feature can be switched back on in future without any code change; when enabled, the generate-token link reappears and opens the Generate token page.

7 Defects

The following defects have been resolved within this update:

Reference	Description
254860	Resolved the issue where expense claim line totals were calculated incorrectly for fixed unit cost items
279604	Resolved the issue where users could view other users' expense claims by changing the claim ID
293299	Resolved the issue where a customer user could not access System Control in Web PMC
295499	Resolved the issue where the Accounting Groups pages in Web PMC failed to load
295785	Resolved the issue where invoice items received duplicate references on registration and import
298970	Resolved the issue where Marketplace checkout was blocked after a Chrome update
300634	Resolved the issue where Export to Excel altered supplier invoice numbers containing two forward slashes

301279	Resolved the issue where invoice tray access changes did not save in Web PMC
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