SMART PO

Show Administrator, Department, Approval flow, and Add User Guide

ENTERTAINMENT PARTNERS

Link to Log in to SPO and Recommended Browsers

SmartPO url: https://smartpo.ep.com

Username and password will be the same as your existing SmartID account

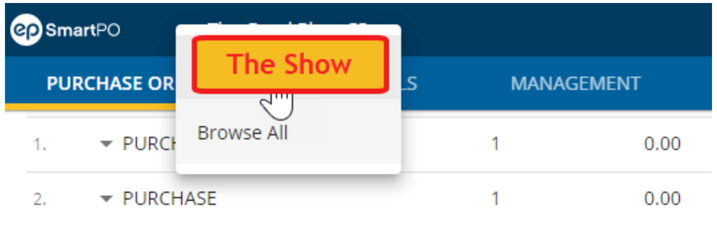
- User must be set up in at least one SmartPO show to log into the product.
- If it is the first time the user is added to SmartPO, they will receive an email to log into SmartPO
- To update or reset first/last name or Google Authenticator. Please contact support.

Recommended Browsers: Chrome, Firefox, MS Edge

- Safari sometimes will create a blank page at log in. However, you can refresh, that will then open up log in screen.

How to Navigate Between Multiple Shows

Go to left hand corner and click on show name:



You will have the option to see the last five (5) projects on the access, drop-down list.

- If you have more than 5 shows, select: "Browse All" option to select Show of choice.

Follow these Three Steps to Setup your SmartPO Show:

1. In order to add users, Department needs to be set-up.
   - A user must be associated with at least one department to be added into the show.
2. At least one Show Administrator must be added in SmartPO at system set-up.
   - This person will be responsible to add all other users.
3. Once Users and Departments are added, you can now create approval flows.

How to Set Up Departments

Show administrator will add departments in SPO

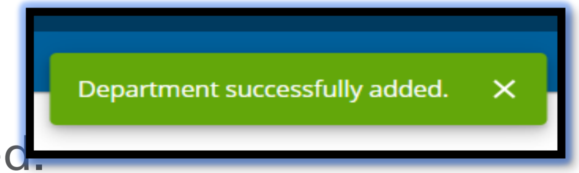
Add New Department:

- Go to: >Management 

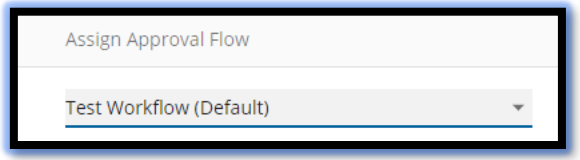
  >Departments 

  >Enter Name of Department 

- Click “Add Department”
- Once saved, message will pop-up informing that your department was successfully saved.



Once department is added, you can **Assign Approval Flow.**



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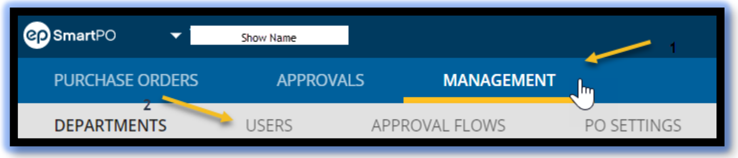
Show Administrator and How to Add Users

NOTE: Show Admin user will be added to program at time of set up.



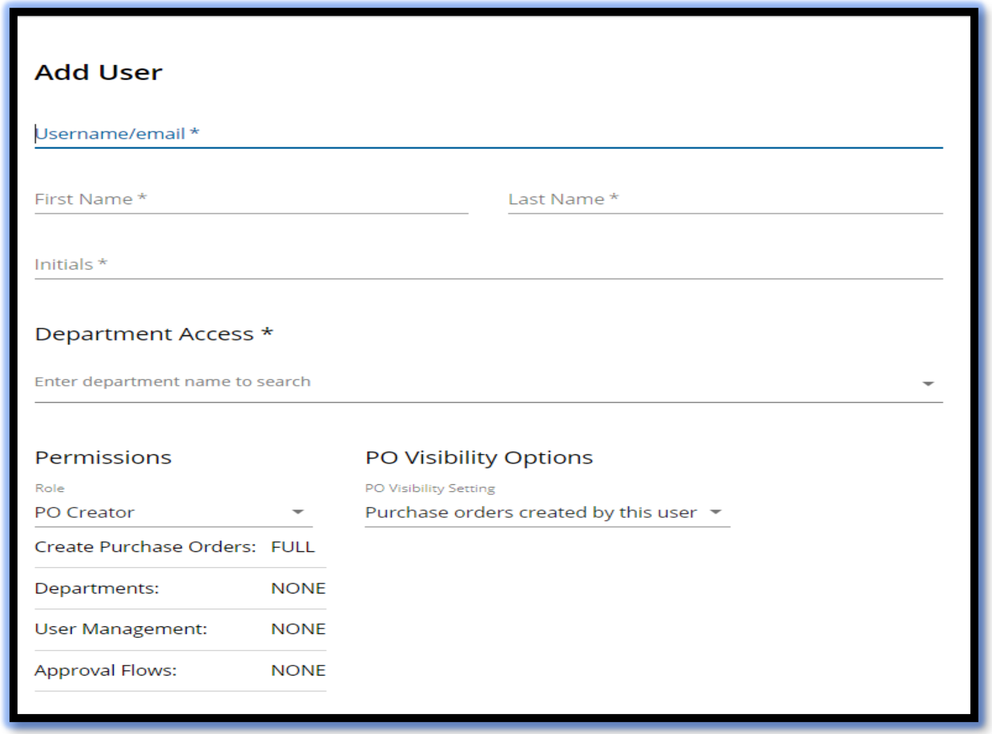
1. Select the “ADD NEW” option:

Show Administrator and How to Add Users

2. Type in the user's email address and tab to the next field. If the user is already setup in SmartID their first/last name will populate automatically.

   If not, fill in the first/last name and the initials will auto fill.

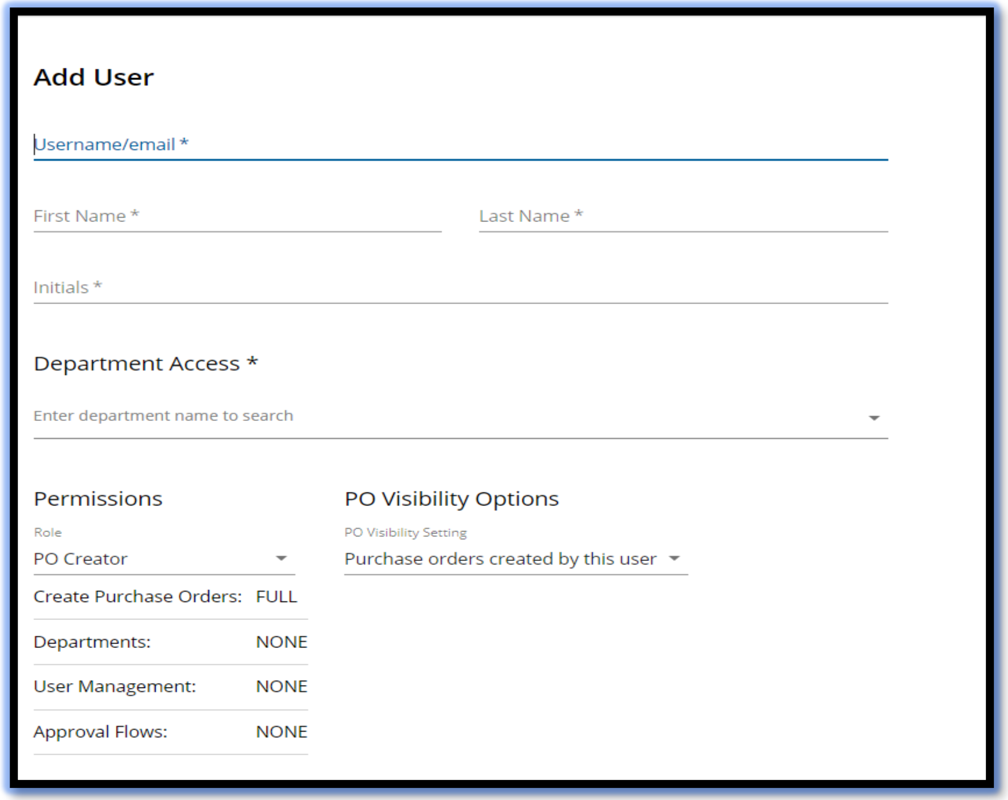
   - If this is the first time the user is added to SmartPO, they will receive an email to log into the system



Important Note: If User does not have existing SmartID username information, a link will be sent once added to SmartPO asking they register the new Smart ID Account

Show Administrator and How to Add Users

3. You will be responsible to assign department of choice access, Permissions, Role, and PO Visibility options. Please note: Minimum of one department must be added.



Important Note: If User does not have existing SmartID username information, a link will be sent once added to SmartPO asking they register the new Smart ID Account

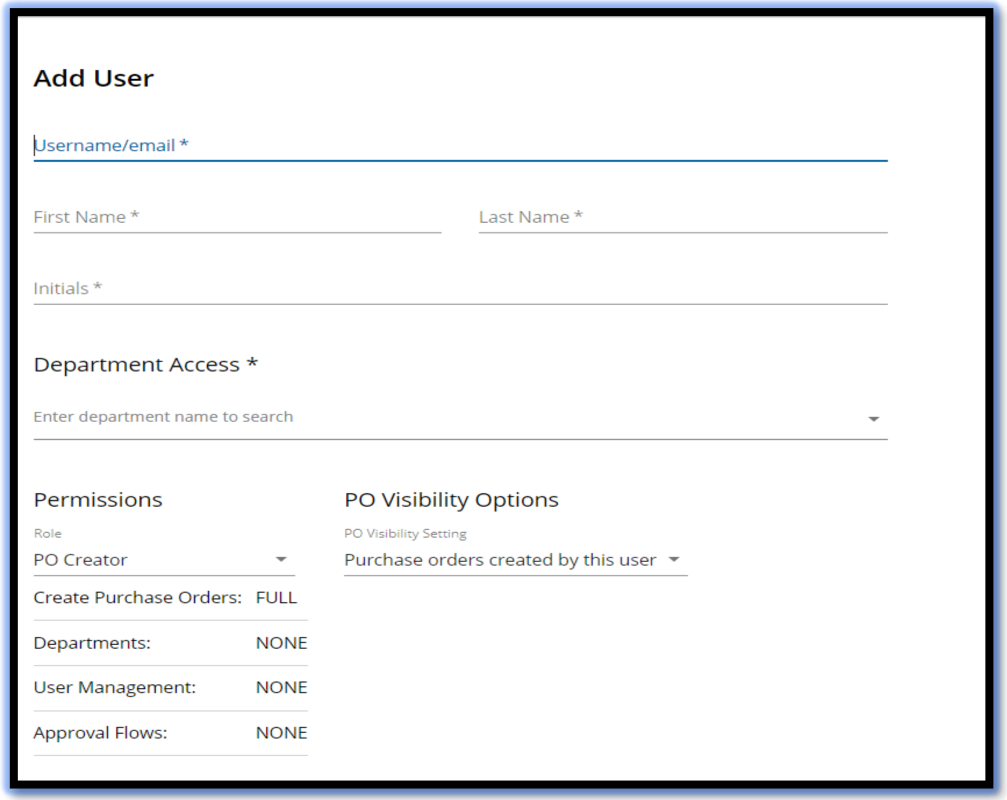
ENTERTAINMENT PARTNERS

Permissions and PO Visibility Controls

Department Access

Show Admin will assign at least one or more department to the user. If the user is a PO creator, they will be able to create POs for these departments.

You can associate one or more departments to a user.



Permissions and PO Visibility Controls

Permissions

Dictates this user's access to SmartPO screens based on a role.

PO Creator
Approver
Show Admin

A **"PO Creator"** role allows the user to create POs but not have access to any management screens.

Permissions

Role: PO Creator

Create Purchase Orders:	FULL
Departments:	NONE
User Management:	NONE
Approval Flows:	NONE

An **"Approver"** role is only given read access to a few screens.

Permissions

Role: Approver

Create Purchase Orders:	NONE
Departments:	READ
User Management:	NONE
Approval Flows:	READ

A **"Show Admin"** role gives the user access to all the setup screens and the ability to create POs.

Permissions

Role: Show Admin

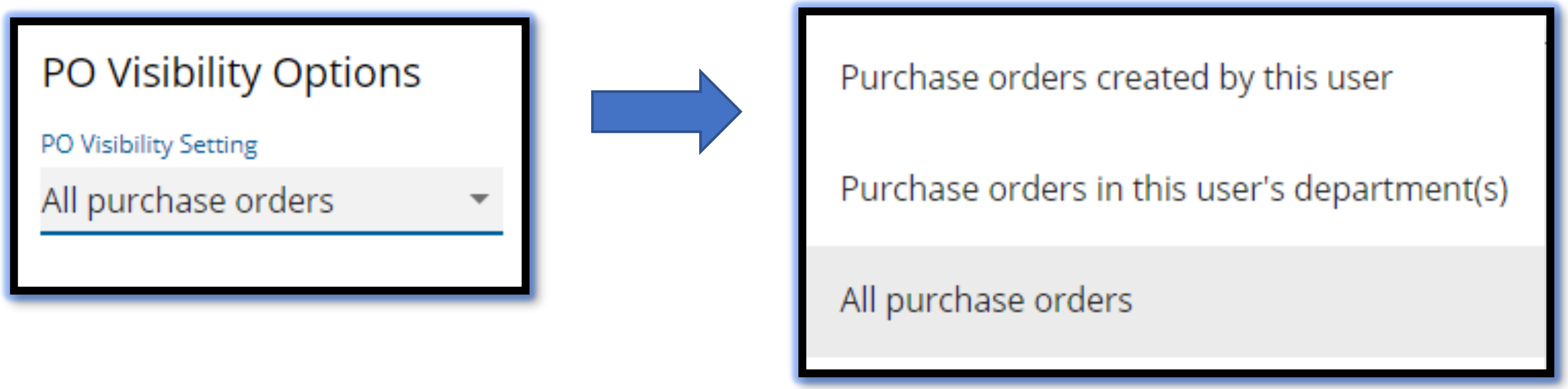
Create Purchase Orders:	FULL
Departments:	FULL
User Management:	FULL
Approval Flows:	FULL

Permissions and PO Visibility Controls

PO Visibility

Controls what POs user can see and users that can view a PO in draft can also edit them.

For example, an accountant can see everyone's PO, a department head can see the POs created for their department.



Approval Flow

How It Works, How to Create

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Approval Flow Setup

In the **Approval Set up** screen, you can set up as many approval flows as you would like, and assign to a custom approval flow for a specific department.

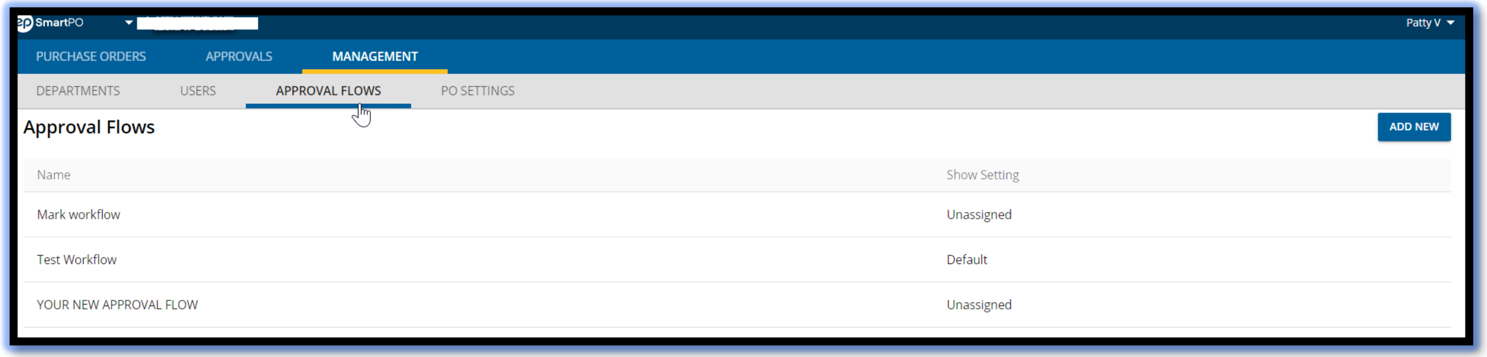
Approval level structure:
Why might you want multiple levels?

- For example, you may want to control the order of approvers, approver A needs to approve before approver B.
- If order doesn't matter, add all approvers to one level and require they all approve. The PO will not move onto the next level until everyone has provided approval.

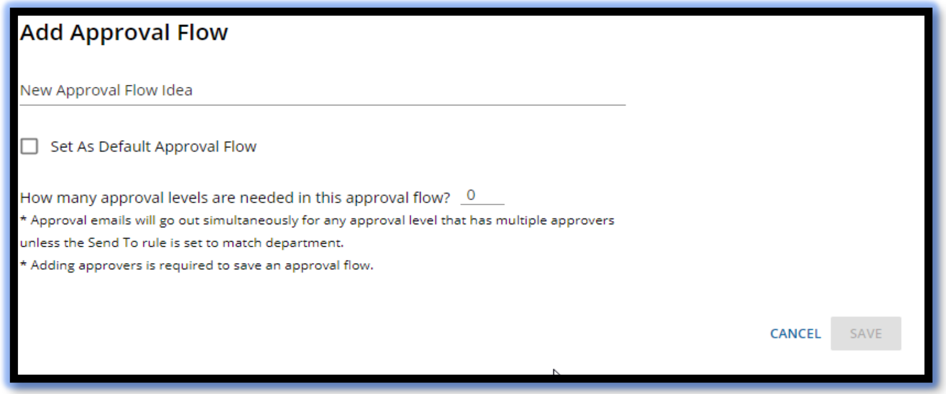
Creating an Approval Flow

- Select **Approval Flows**

- Add New



- Add Approval Flow name

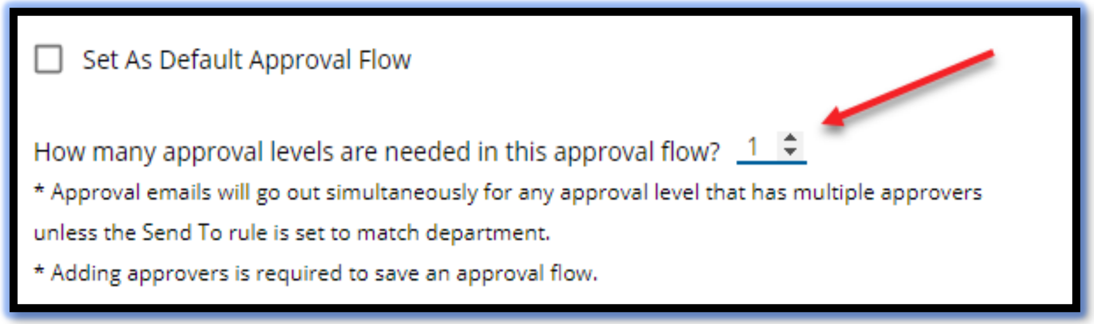


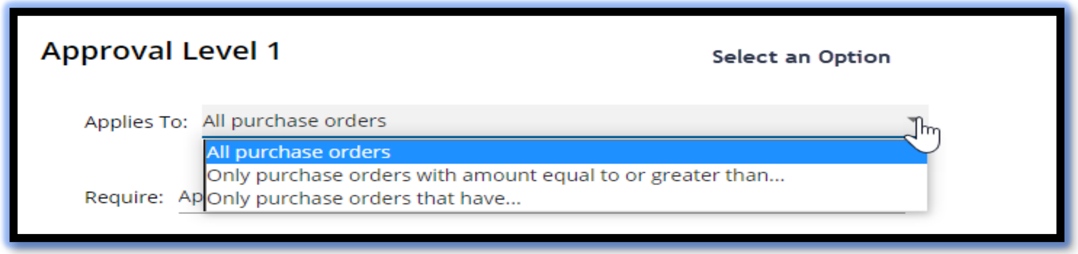
Options

- Select the "Set as Default Approval Flow" checkbox if this approval flow will apply to all POs.

- Select the number of approval levels needed for the approval flow.

- Under the **Applies To** option, choose which POs should pass through this level. If it's All POs, then select that option. If there's a condition for this level, provide an amount threshold or a category condition.

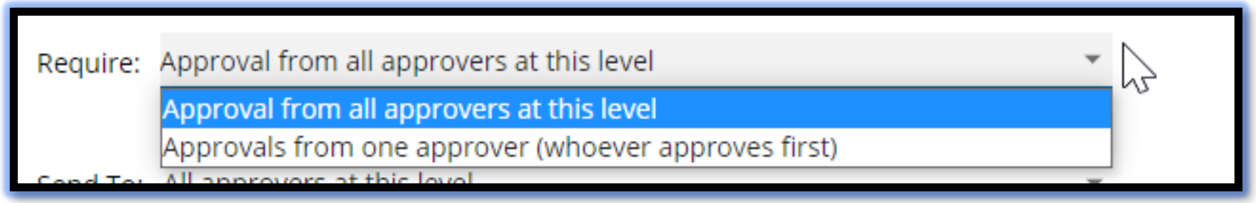




Options

- Under the **Require** option, select how many approvers are needed for this PO to move onto the next level.

  Only one needs to approve or everyone in this level needs to approve.

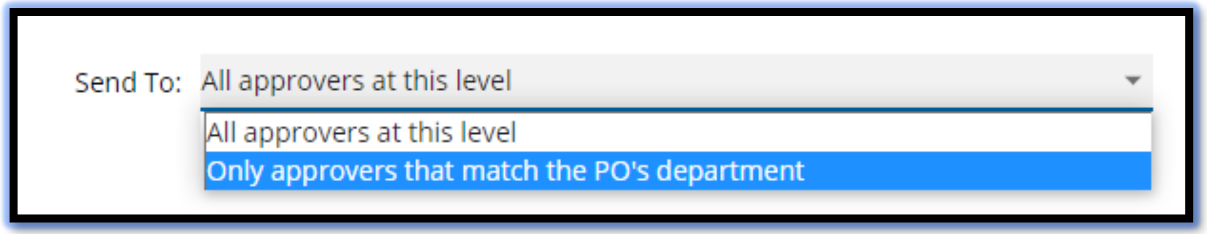


ENTERTAINMENT PARTNERS

Options

- **Send To option**
  Controls who is notified to approve the PO. In most cases it will be all approvers at this level. But if you're setting up an approval flow that will apply to multiple departments, you can select **Only approver that match the PO's department.**

  When you assign all the department heads into one level, only the approver that matches the PO's department will be required to approve. This saves time by not having to create a custom approval for every department.



Options

Category Condition

A custom field that will allow users to add a conditional approval with a category

- The intention is to give flexibility when building approval and sometimes there exceptions where additional approval is needed
- A good example of this is XXX Studio, they normally have a 4 level approval flow for their POs but for wrap parties specifically, they have a 7 level approval flow
  - So with category conditions, the show can add a category called "wrap party" and build in the extra approvals to their standard approval flow and put the "wrap party" category condition
  - When a PO is created, it will be associated to the "wrap party" category on the PO creation screen and once submitted for approval it must go through all 7 levels to be approved

Options Settings

In the Approval Flow you have the following options:

- **Applies to:** which POs require approval at this level?
- **Require:** how many people in the level needs to approve this PO?
- **Sent to:** which approvers should be notified to approve this PO

Options Settings

Applies to: Which POs require approval at this level?

- **All POs**
  - Every PO must get approval from this level
- **Only POs with amount equal or greater than…**
  - Users can specify an amount threshold where, if the PO is at or above the amount, it will require approval at this level
- **Only POs that have…**
  - Users can create custom categories for this field to build out a studio's workflow
  - Ex. Studio YYY has a category condition where if a PO contains an "equipment package", it requires additional approval
  - When the workflow is created, a condition will be set require approval for all POs that have "equipment package" selected for the "PO contains" field

Options Settings

Require: How many people in the level needs to approve this PO?

- **All approvers in this level**
  - Everyone assigned to this level must approve the PO before it can move onto the next level
  - This is good when you may have an accountant and the UPM in one level, both have to approve but they can approve in any order
- **Approval from one approver** (whoever approves first):
  - Out of everyone in the level, only one needs to approve for the PO to move onto the next level
  - This is good when you have a primary approver and a backup, either one can move the PO forward to the next level

Options Settings

Sent to: Which approvers should be notified to approve this PO

- **All approvers at this level**
  - Everyone assigned to this level will be notified to approve
- **Only approvers that match the PO's department**
  - This option is intended for a standard workflow (across departments) where instead of having to build a custom flow for each department, you can put all the department heads in one level and only the relevant department head is notified to approve based on the department on the PO

Important Notes

Once first approval flow is added, it will be **marked as default and applied to all existing departments.** Any additional approval flows created will need to be assigned manually. For example, post approval flow, needs to be assigned manually after initial one created. Go back to Management>Departments to assign.

If an approval flow is modified while POs are submitted, the current POs **will not update with the new flow.** If they need to pick up the new flow, they will have to reset back to draft and resubmitted for approval.

ENTERTAINMENT PARTNERS

Important Notes

The race condition where in a group of approvers in one level, you can only require one of them to approve for the PO to move onto the next level.

“Only approvers that match the PO's department"
If approval is the same for multiple departments, you can create a level for all department heads (first approval) so only the department head will be notified when a PO that matches their department goes through the approval process.

Important Notes

Users become Approvers when they're associated to an Approval Flow

- There is an 'Approver' role that only controls **access** to SPO screens; but assigning the role does NOT make the user an approver

Approval Flows can be modified at any time during production, but POs that are already in the approval process will NOT update to the modified flow

- Only newly submitted POs will pick up the modified flow

Important Notes

Consider if you need **multiple levels** for approval flow

- If you have multiple approvers that must approve every PO, do they need to approve in sequence or they just all need to approve?
  - If you want approver A to approve before approver B, build them into separate levels.
  - If you don't care in what order they approve, put them all in one level and require everyone to approve.
- This will simplify the workflow

Purchase Orders

Creating, Approving, and Managing

ENTERTAINMENT PARTNERS

PO Settings

PO Show Prefix

Your PO's will start at 0001.

Best practice:

If you plan to use a prefix, it's recommended that you set it up before creating POs. This way, when the POs are approved and sent to the accounting system, they'll have the prefix as part of the PO number. But you can add a prefix after you've started creating POs. The prefix will be applied to all POs.

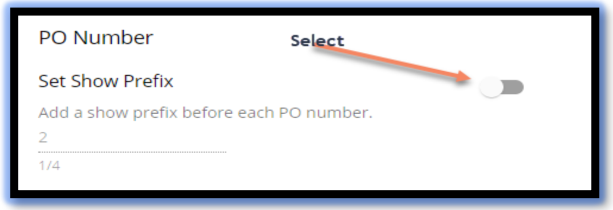
Steps to set up Prefix:

- Management 

- PO Settings 

- PO Number 

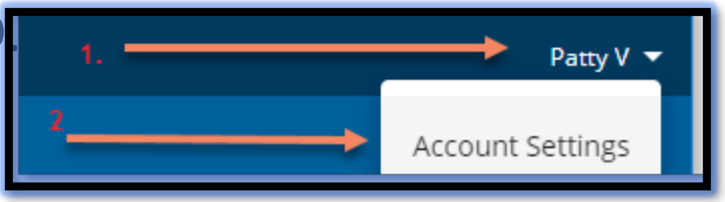
- Select **Set Show Prefix** and enter prefix of choice. You can use up to four (4) characters alpha Numeric.



PO Settings

How to turn off email notifications for any user

- Go to the top right corner of SmartPO. Find your name and click on it.



- Select "Account Settings." You will see a toggle to turn notifications on or off.

- This setting will apply for any notifications coming from SmartPO.
  - Remember, creators get notifications too when a PO has been fully approved or revised.
  - Approvers get notifications when a PO has been assigned to them to approve. This will only apply to individual’s profile

- **Please note:** Currency of a PO is dependent on Company selected and how it is set up in Accounting System.

Creating a Purchase Order

How to create a Purchase Order:

- Go to **Purchase Orders** 

- **Create New** 

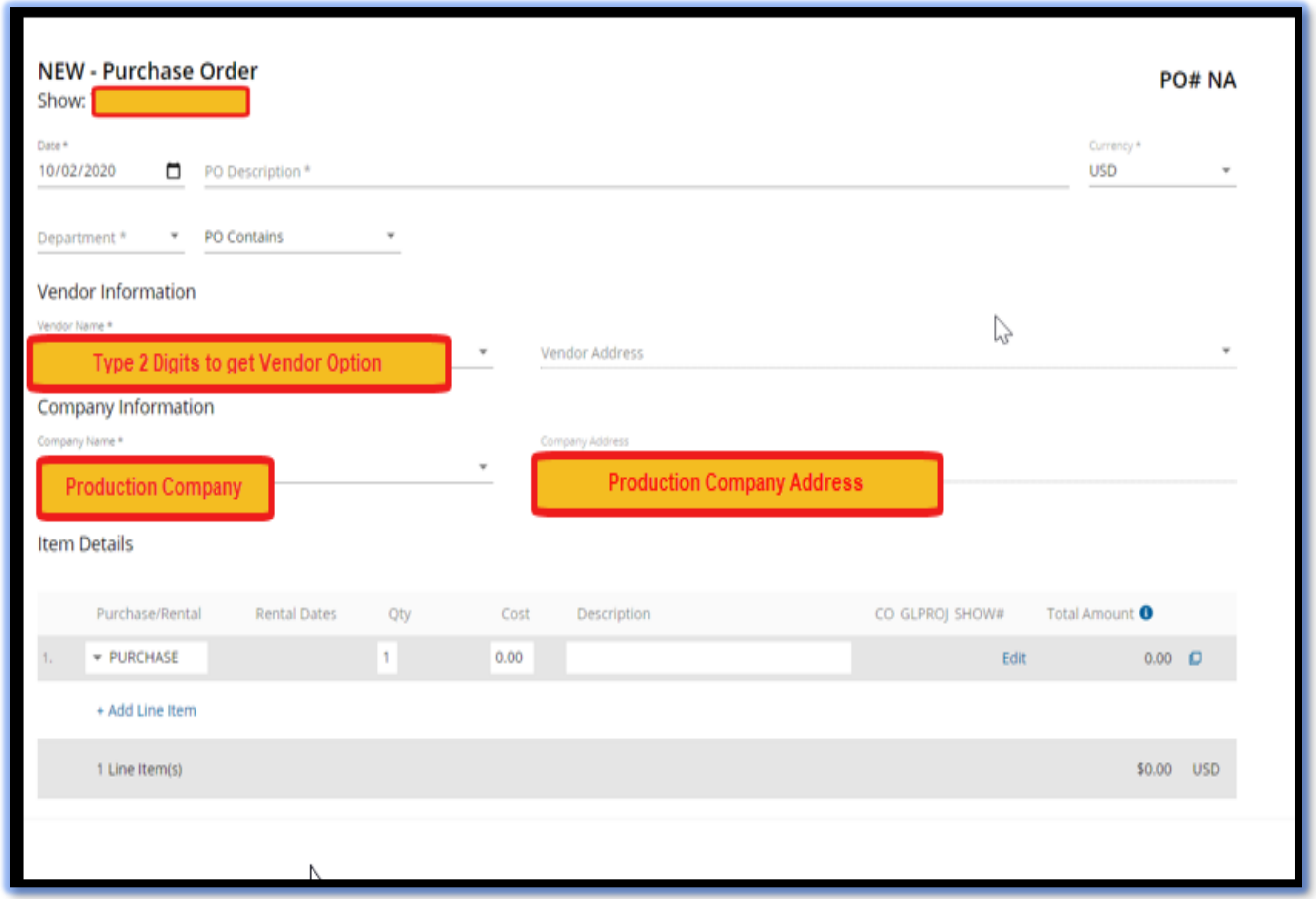
Creating a Purchase Order

Fill in top fields using drop down menus.

Click **Edit** to enter Accounts from your Accounting System Chart of Accounts.

- GL accounts are not mandatory.

NOTE: Company, Currency, Vendors, and Accounts fields sync from the Accounting System. In order to sync with SmartPO, this information must first be entered in the accounting system.



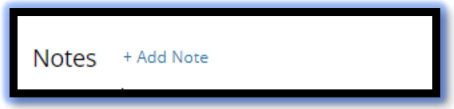
Creating a Purchase Order: Tips and Tricks

To add line of distribution:

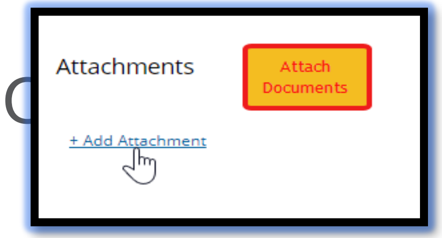
To copy lines:

To delete lines:

To Add Notes:



To Add Attachments:
You can drag and drop attachments onto the PO



Creating a Purchase Order: Tips and Tricks

After filling out PO, select

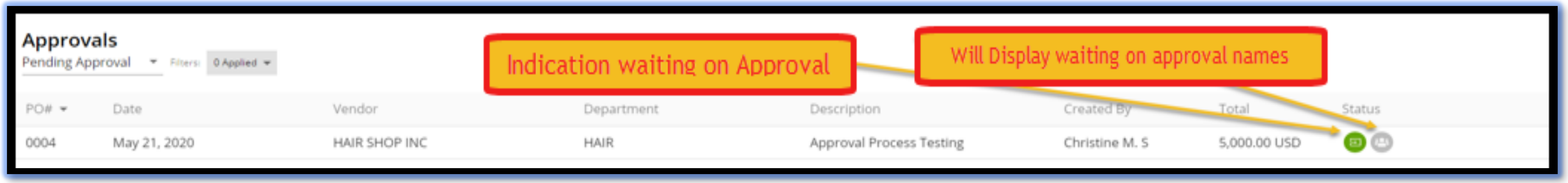
Save as Draft
or
Save and Review:

Creating a Purchase Order: Tips and Tricks

- **Save As Draft:** You can Save PO and come back to it later to modify, before you save and send for approval. PO Number is assigned when it is saved as draft.
  - To save a PO as draft, the required fields are PO description, department, and vendor. The GL coding is NOT mandatory.

Creating a Purchase Order: Tips and Tricks

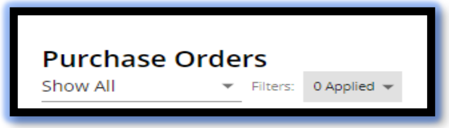
- **Save & Review:** You are saving and reviewing the PO before submitting for approval.
  - You can download PDF or send the PO via email on the review screen.
  - After submitting, the PO will then show up as awaiting approval and display the approvers under the status column.



Reviewing and Managing POs

To look up PO's:

1. Select the **Purchase Order** tab. 

2. Select **Filter** drop-down. 

3. Chose the filtering option of choice. What PO's do you want to see?
   - **Show All** – Show all PO's regardless of stage.
   - **In Progress** – In Progress only shows POs that are in draft or submitted for approval.
   - **Approved** – Approved only shows approved POs.
   - **Denied** – Show all PO's that have been denied by Approve

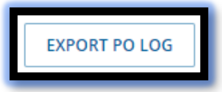
Please note: If PO is denied it is effectively voided and cannot be reused. There is an option to duplicate the PO if it needs to be recreated.

Reviewing and Managing POs

You can sort columns while viewing PO's and Create Export PO Log.

- **To sort:** Click on the header you would like to sort by, and that choice will sort all PO's in view mode

- **To create Export PO Log:** Click on "Create Export PO Log" tab and Excel report will populate and allow you to open a log of POs



Approval of POs

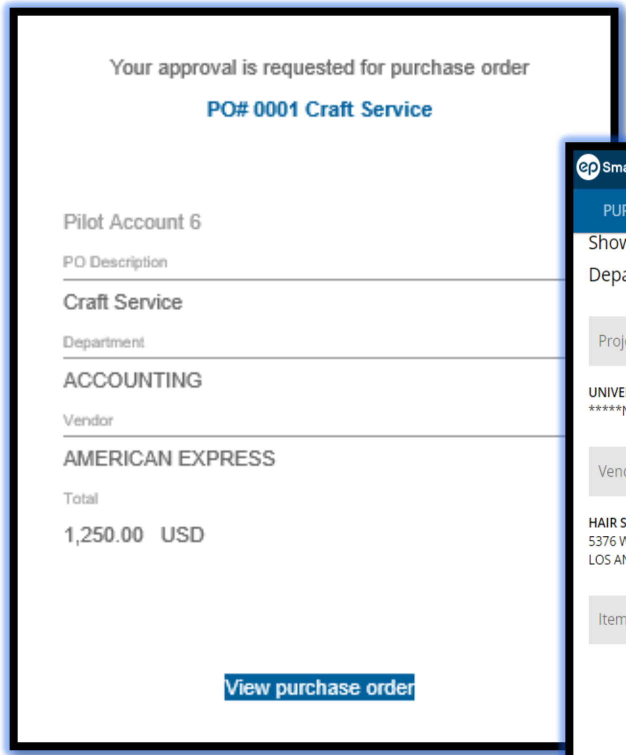
Here are the approval options for approvers:

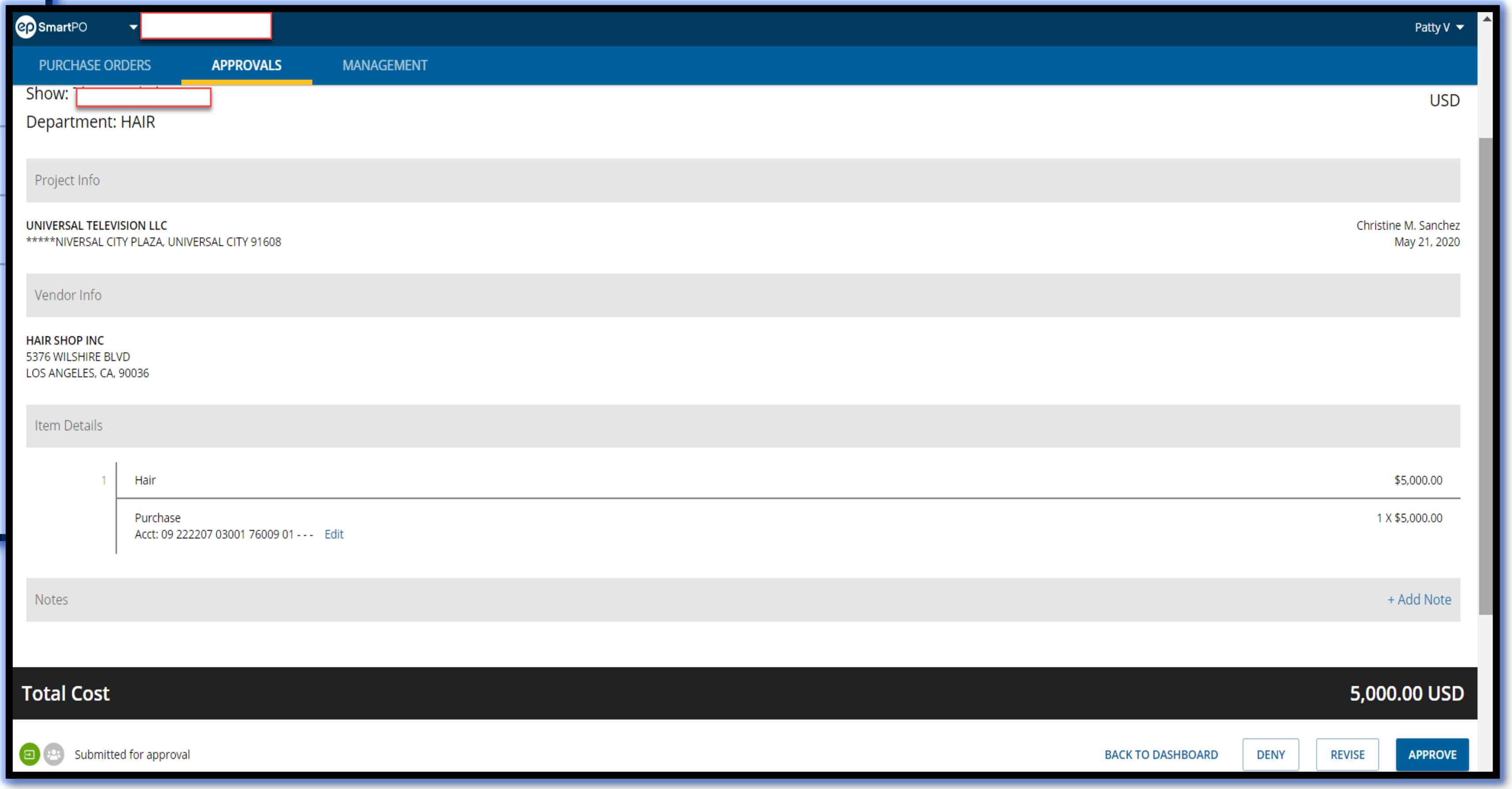
- **Approve**
  Once approved, the PO will proceed to next or approver based on workflow. If final approval has been given then the PO is automatically sent to the accounting system (SA and V5). A notice will be sent to creator once fully approved.

- **Deny**
  Approver must provide a note as to why they're taking this action. Once PO is denied, it is voided and can no longer be used.

- **Revise**
  Approver must provide a note as to why they're taking this action. PO is sent back to the creator and PO is tagged with a revision label. The PO is back in a draft state.

Approval of POs



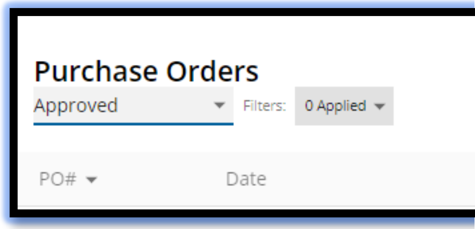


Approval of POs

- Approver can modify GL coding only.
- Any other change would require revision.
- Approver (s) will get an email indicating they have a PO ready for view and approve.
  - **Option 1:** Approver can click on the "View purchase order" box within email. That will take user straight to SmartPO database which will require them to sign in to view the PO.
  - **Option 2:** Approver can log in directly to the Smart PO show and select the approval tab to see the POs waiting for their approval.
  - The link to "View purchase order" in the email will expire after 7 days. If the link is expired, it is recommended the approver use option 2.

Resend PO into Accounting System

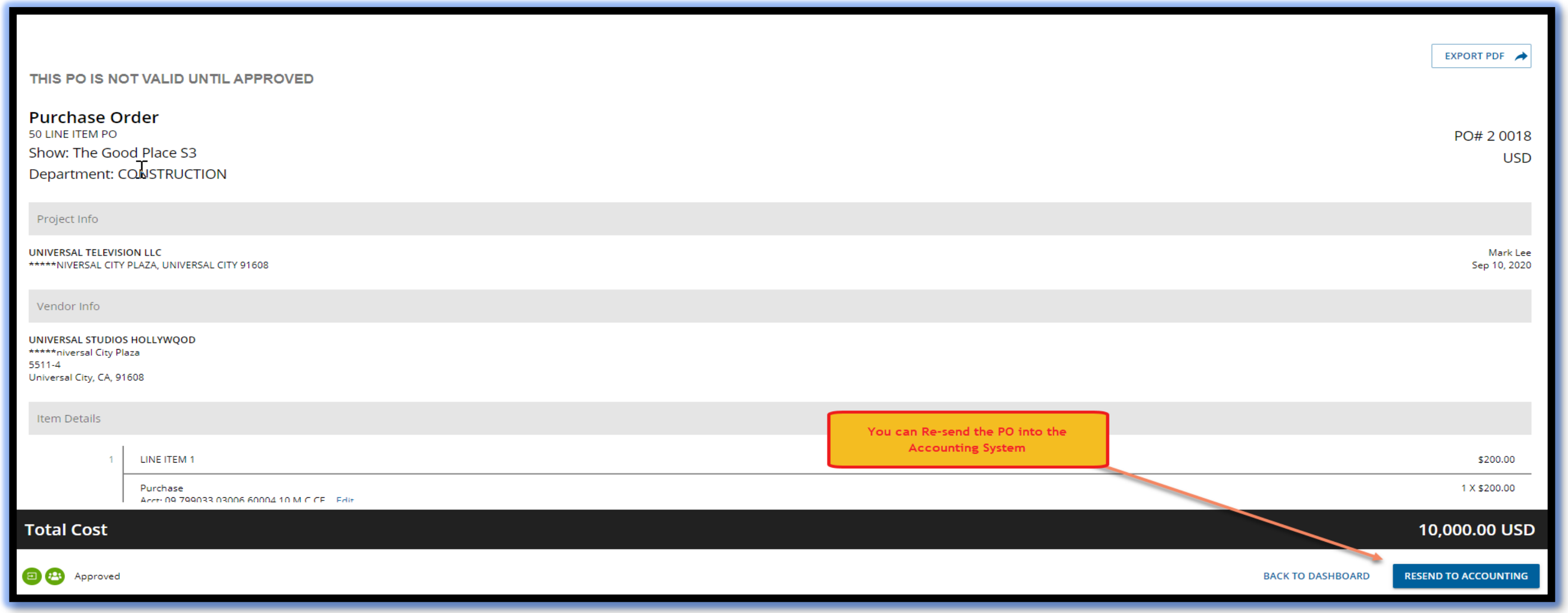
Go to **Purchase Orders** and select “Approved” from the pick list.



Select approved PO by clicking on it.

Select “Resend to Accounting” option.

The option to resend to accounting is not restricted by permissions. Be aware if triggered multiple times, it may result in duplicates of the same PO in the accounting import screen.



ENTERTAINMENT PARTNERS

Need assistance with SmartPO?

We are more than happy to help you.

Main Support Phone:
818 955-6300, Ext # 2

Email:
sposupport@ep.com