

SmartPO Release Notes

Release date 1.13.2023*

What's New?

Click a link to learn more:

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*Release date and features are subject to change.

1. Autosend Approved POs to Vendors

Enable an autosend email option to send fully approved POs to vendors from SmartPO — saving you the step of sending them. Then, add email addresses to the CC or BCC fields so your production has visibility.

Note: At least one email address must be on file per vendor.

How It Works

1. Go to Management, Settings (Show Admins only).
2. Under the Purchase Orders column, select Autosend PO to Vendors.
3. Click the **Enable Autosend** toggle.
4. CC or BCC anyone from your project when each approved PO autosends to vendors (optional).
5. Adjust the vendor's visibility using the checkboxes.
6. Click **SAVE** to enable.

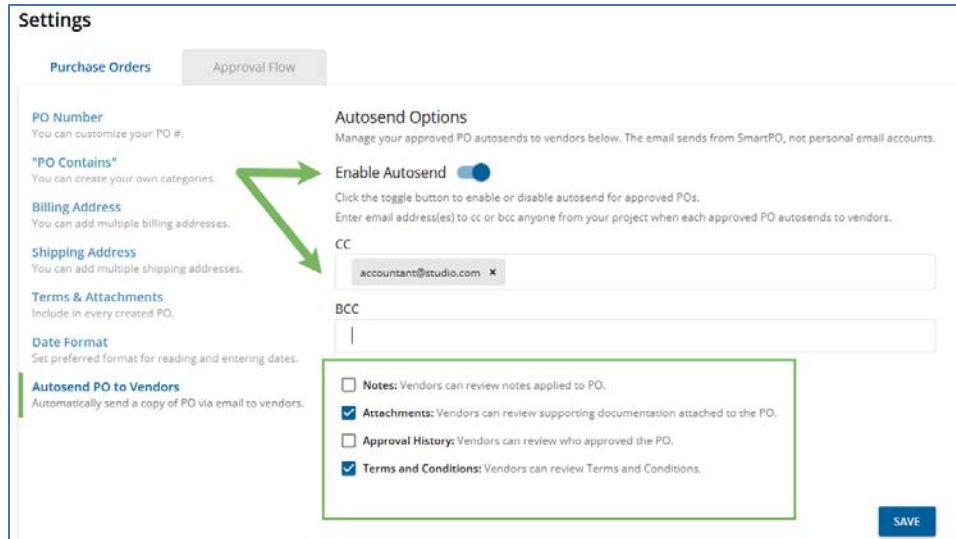


Figure 1: Enable Autosend, CC and BCC

Note: The system notifies you if a vendor does not have an email on file.

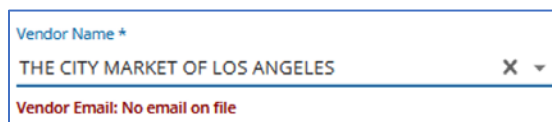


Figure 1a: No email on file notification

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2. New Date Format Options

Use the date format options to customize how dates display in SmartPO. Then, consistent PDF dates ensure that the production and vendors refer to uniform dates.

How It Works

1. Go to Management, Settings (Show Admins only).
2. Under the Purchase Orders column, select Date Format.
3. Select your date format from the dropdown. The date format applies to the header date and rental date range fields.

Note: Exported PDFs only display as YYYY/MM/DD.

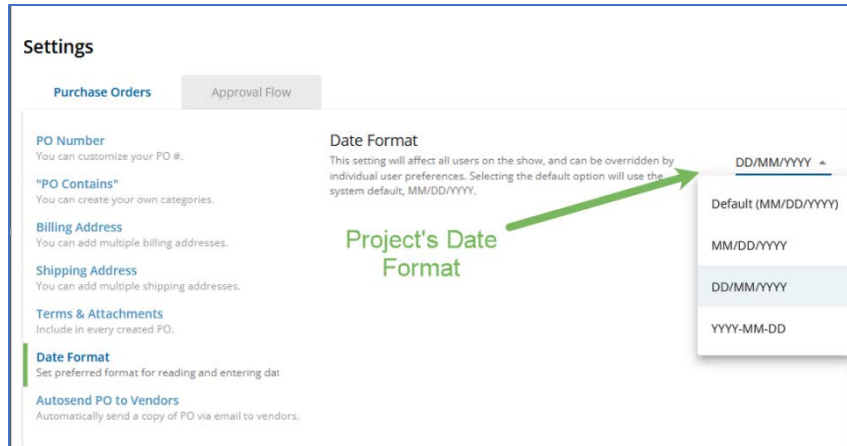


Figure 2: Project's Date Format

4. If needed, under Account Settings, customize the date format that displays for you only.

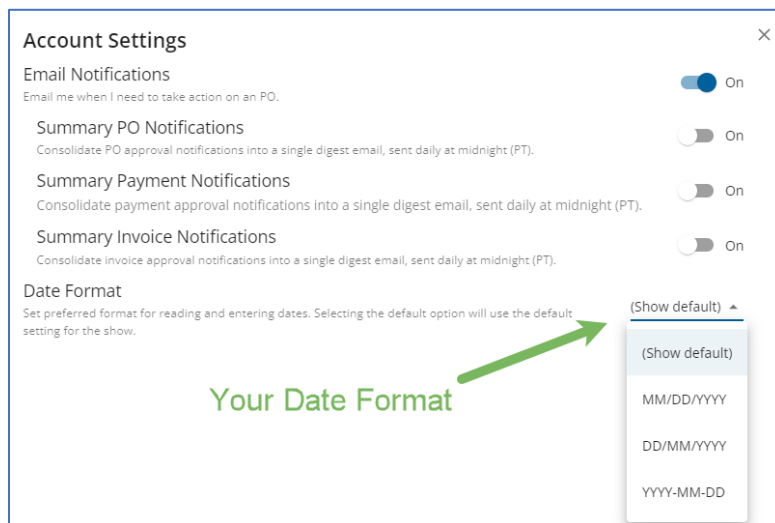


Figure 2a: Your Date Format

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3. Change Orders Filter for POs

A Change Orders filter from the Purchase Orders tab lets you navigate to POs with Change Orders.

How It Works

1. Select Filters from the Purchase Orders tab.

2. Click the **Change Orders only** checkbox.
3. Click **APPLY** to filter.

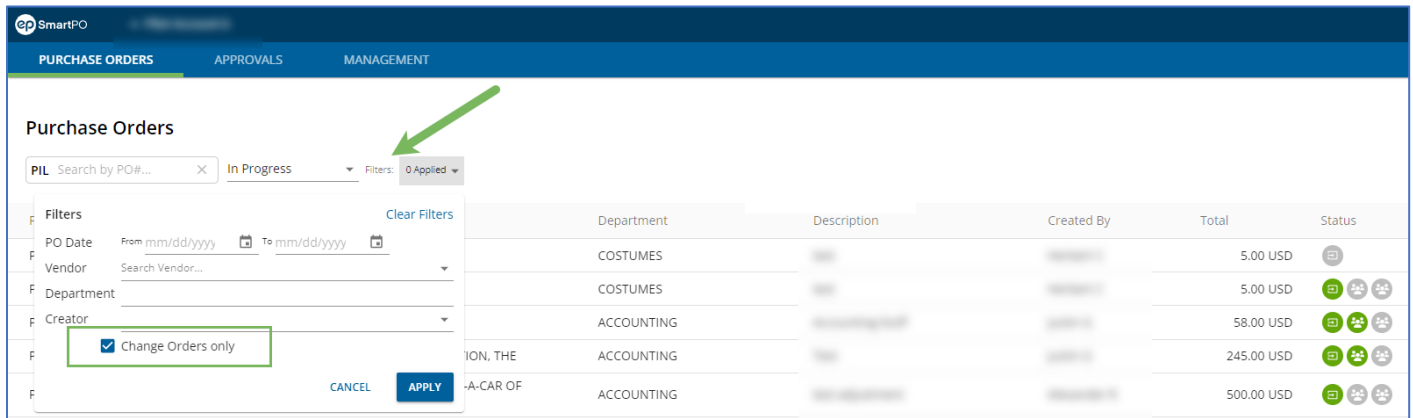


Figure 3: Change Orders filter

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4. System Improvements

Approval items load following a Void or Revise

The next approval item loads regardless of the earlier item's approval action for a consistent experience. Before, the next item would only load following approval.

Added warning to MFA user setting

A warning displays when Show Admins enable Multi-factor Authentication (MFA). The warning shows that:

- The action enables MFA across a user's SmartPO projects.
- Only EP can disable the setting.

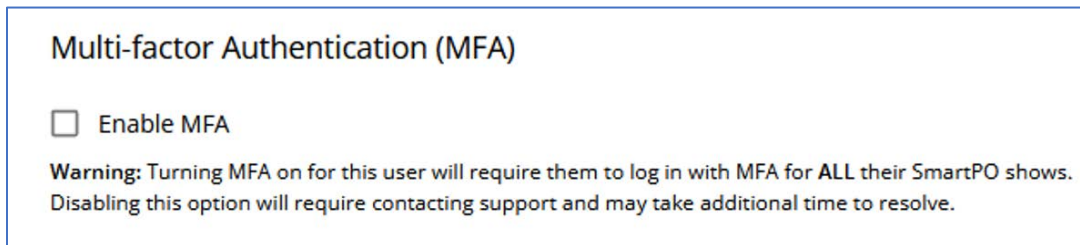


Figure 4: MFA warning

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SmartAccounting and SmartPO Integration Updates

The following covers a release feature for SmartAccounting and SmartPO +Payables. This feature only applies to organizations piloting this integration with EP. To learn more, contact your EP Account Management team.

1. Change Order Integration with SmartAccounting

Previously, Change Orders made in SmartPO needed a manual update in SmartAccounting for import. This update removes the manual steps for tracking which Change Orders were updated in SmartAccounting.

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