
SMART business



SmartPoint DMS

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1. Introduction

This document describes the enhancements and changes to the SmartPoint DMS (SPDMS) functionality included in the regular 2025.04 update. The update covers changes made during the period from January 1, 2025, through March 31, 2025.

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2. SmartPoint DMS Updates

The update includes the following improvements, new features, and enhancements to existing functionality:

No.	Description	Module	Type of Change
1	<p>Two new parameters have been added to the Counterparty card, allowing counterparties to be categorized based on the company they cooperate with.</p> <p><u>How it works</u> The new fields are available when creating or editing a counterparty card and define its association with one or more companies.</p> <p><u>Why it's useful</u> This update enables more efficient management of counterparties in structures where operations are conducted on behalf of multiple companies. It provides greater system configuration flexibility and simplifies working with a large number of counterparties.</p>	SPDMS Counterparties	New Feature
2	<p>Improved integration with Power BI for using analytical reports directly within the working environment.</p> <p><u>How it works</u> Power BI reports can now be embedded both in the SmartPoint DMS module and in SmartPoint Intranet (if a corporate portal is in place). Embedded reports appear as interactive blocks with retained filters and dynamic data updates. Reports are added through the standard integration interface – just insert a report link or use a connection to a Power BI workspace.</p> <p><u>Why it's useful</u> Users can view up-to-date analytical data directly within the SmartPoint DMS interface without switching between systems.</p>	SPDMS Agreements SPDMS Internal Documents SPDMS External Documents SPDMS Financial Requests	Enhancement

3	<p>Email field fill-out when creating a counterparty from a document card.</p> <p>How it works When creating a counterparty from a contract card, it is now possible to immediately enter or edit the company's email address. The field is available both for entering new information and for updating existing data in the counterparty profile.</p> <p>Why it's useful This functionality is essential for integration with electronic services (e.g., sending notifications, automated emails, or invitations). It saves users time by allowing key information to be entered immediately without navigating to the separate Counterparties section.</p>	SPDMS Counterparties	New Feature
4	<p>Cloning a previously created request.</p> <p>How it works A functional "Copy" button is available in a created or submitted request card that is in the approval process. This button allows users to create a new request based on an existing one. When cloning, the contents of the main information block fields are automatically copied. Users can edit the cloned request before launching or saving it.</p> <p>Why it's useful: Enables quick creation of repeated or typical requests without entering data from scratch. Saves time and reduces errors by reusing verified data. Improves convenience when working with mass or recurring requests.</p>	SPDMS Financial Requests	New Feature
5	<p>Support for Spanish interface localization.</p> <p>How it works Users can select Spanish in their profile settings. Key modules, buttons, messages, and system prompts have been translated and adapted for Spanish-speaking users.</p> <p>Why it's useful: Provides a seamless experience for Spanish-speaking teams without language barriers. Supports international projects and teams where some employees work in Spanish.</p>	System Functionality	New Feature
6	<p>Updated Internal and External Documents module with extended cross-module integration.</p> <p>How it works New functionality enables linking previously created</p>	SPDMS Internal Documents SPDMS External	Enhancement

<p>documents across different modules, providing convenient access to related content within business processes.</p> <p><u>Why it's useful:</u> The integration supports a unified and consistent document workflow structure.</p>	Documents	
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