Released Update ProjectPro 28.0.06.50931 (Global)

Application Enhancement & Hot Fixes

Update ID	Type	Title	Functional Area
3807	New Feature	Enhance "OPS Manager Report" for Contract Projects	Reports
3868	New Feature	Priority of Planning Line Costs Over Purchase Price Lists on Purchase Order	ProjectPro Basics
4379	New Feature	Enhance "Project WIP Report" for Contract Projects	Reports
5004	Enhancement	Progress Payment Quantity Validation for Resource and G/L Account Lines	Progress Payment
5111	New Feature	Purchase Order Accrual Project Cost - G/L Entries	ProjectPro Basics
5214	Enhancement	Burden Calculation for Usage with Positive Amount Conflict with "Update Project Item Cost" Batch	ProjectPro Basics
4632	Enhancement	Progress Billing - Progress Billing Lines and Tooltips	Progress Billings
5242	Enhancement	Project Quote - Workflow Section on the Ribbon	Project Quote
5256	Improvement	Sub-Level Customer Address Inheritance from Parent Project	ProjectPro Basics
5091	Enhancement	Reposition "User Tasks" and Create Options on the Project Card Ribbon	ProjectPro Basics
4681	Enhancement	Add Tooltips to "Skill Class" Fields in Project Journal	Project Pro Basics
5363	Enhancement	Additional Events for Different Create Sub-Level Projects Option	ProjectPro Basics
5389	Enhancement	PFW - "Outstanding Orders" and "Amt. Rcd. Not Invoiced" with Sub-Levels	Project Forecast
5456	New Feature	ProjectPro Process Based Roles and Permissions	ProjectPro Basics
5003	Improvement	PMP Page Locking During Purchase Order Creation	Project Material Planning
5185	Improvement	PP UI Changes – Tooltips and Obsolete Fields	ProjectPro Basics
5309	Improvement	Actual Cost/Billings Analytics – CO Numbering	Project pro Basics

Update ID	Type	Title	Functional Area
5313	Improvement	Project Contacts - Update Source Name for Customer via Progress Billings	Progress Billings
5314	Improvement	Work Order (R_14021488) and Work Order Completed (R_14021288) Reports - New Entry Creation Conflict	Reports
5320	Improvement	General Business Posting Group on a Sales Invoice via Progress Billings	Progress Billings
5328	Improvement	Sorting on "Cost Categories by Codes" List	ProjectPro Basics
5364	Improvement	"Default Tasks" Pop-up While Creating a Project	ProjectPro Basics
5405	Improvement	Forecast Voiding on Project Summary Details with SubJob	Project Forecast

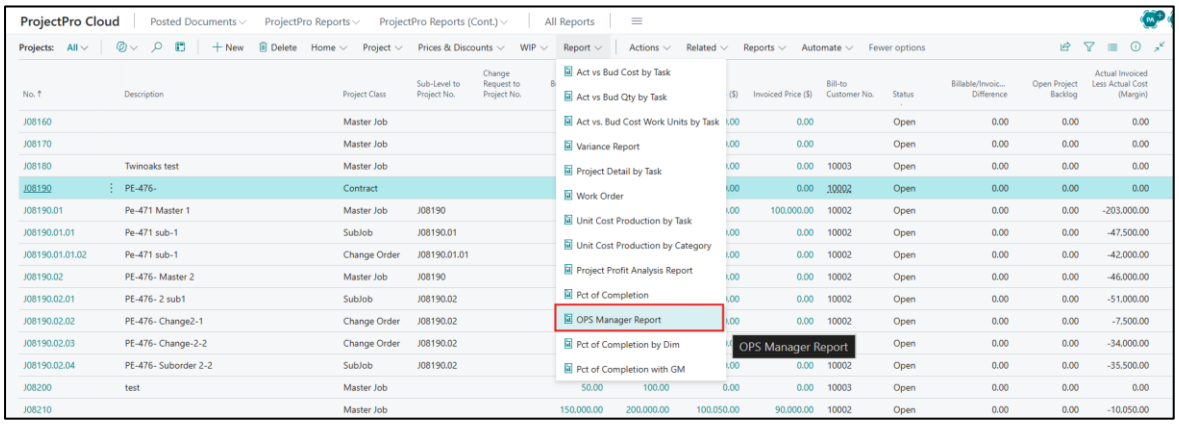
**Note: Details are given below in “Release Note Details”.

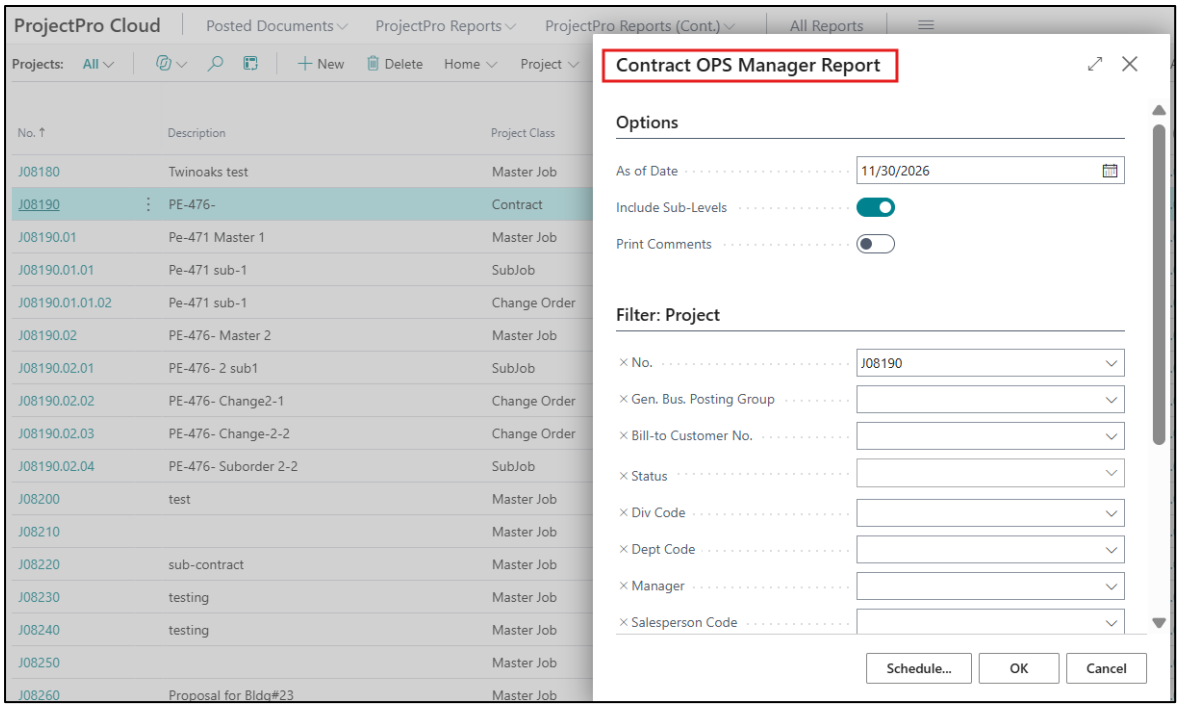
Release Note Details

ADO-3807

New Feature – Enhance "OPS Manager Report" for Contract Projects

The OPS Manager Report now works for Contract projects as well and respects the hierarchy accordingly. It also prioritizes the two Booleans on the project card, “Forecast to Include Sub-Levels” and “Perform Forecast on Sub Project”.





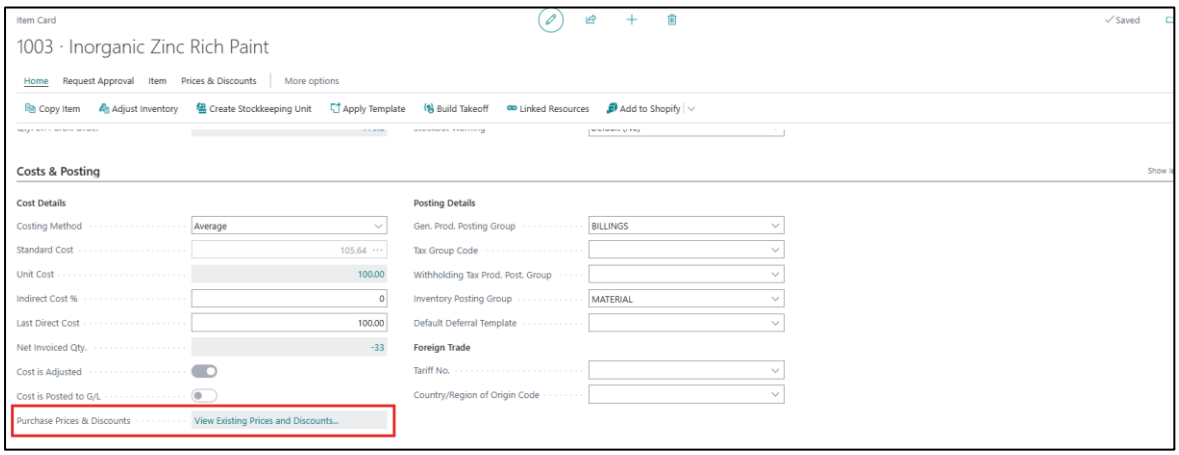
Project No.	Description	Current Contract Price	Current Contract Cost	Current Booked GM%	Current To Date Billings	Current To Date Cost	Current Forecasted Total Cost Estimate	Current TCE Forecast Variance from Prior Month	Current TCE To Current Contract Cost Variance	Current Forecasted Cost To Complete	Previous Forecasted Cost To Complete	Current Forecasted GM%
		C	D	E	F	G	H	I	J	K	L	M
				((C-D)/C)*100				H-V	H-D	H-G		((C-H)/C)*100
J08190	PE-476-											
J08190.01	Pe-471 Master	339,000.00	295,000.00	12.98	100,000.00	213,500.00	295,000.00	295,000.00	0.00	81,500.00	0.00	12.98
J08190.01.01	Pe-471 sub-1	235,500.00	178,500.00	24.20	0.00	94,500.00	178,500.00	178,500.00	0.00	84,000.00	0.00	24.20
J08190.02	PE-476- Master	427,900.00	320,600.00	25.08	0.00	181,500.00	320,600.00	320,600.00	0.00	139,100.00	0.00	25.08

ADO-3868

New Feature – Priority of Planning Line Costs Over Purchase Price Lists on Purchase Order

If an item has a price list defined on the Item Card and a different cost specified on the Project Planning Lines, the system will now prioritize the cost from the Project Planning Line when creating a Purchase Order in the following scenarios:

- Purchase Order created through JMP.
- Direct Purchase Order created using the **Get Project Planning Line** functionality to populate the lines.

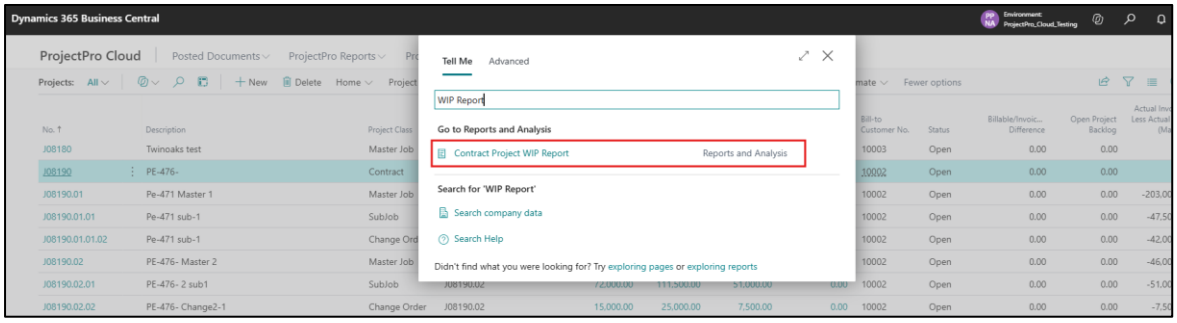


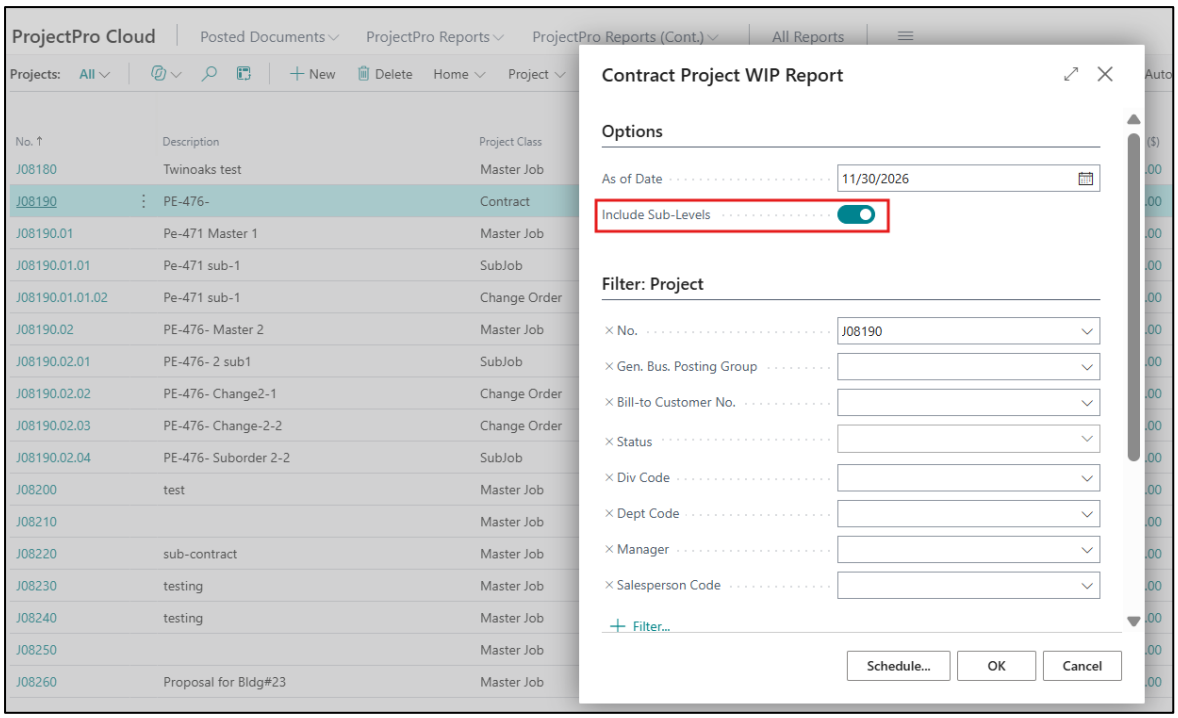
Note: The same functionality has also been implemented for Purchase Invoices and Purchase Credit Memos.

ADO-4379

New Feature – Enhance "Project WIP Report" for Contract Projects

The Project WIP Report now works for Contract projects as well and respects the hierarchy accordingly. It also prioritizes the two Booleans on the project card, “Forecast to Include Sub-Levels” and “Perform Forecast on Sub Project”.



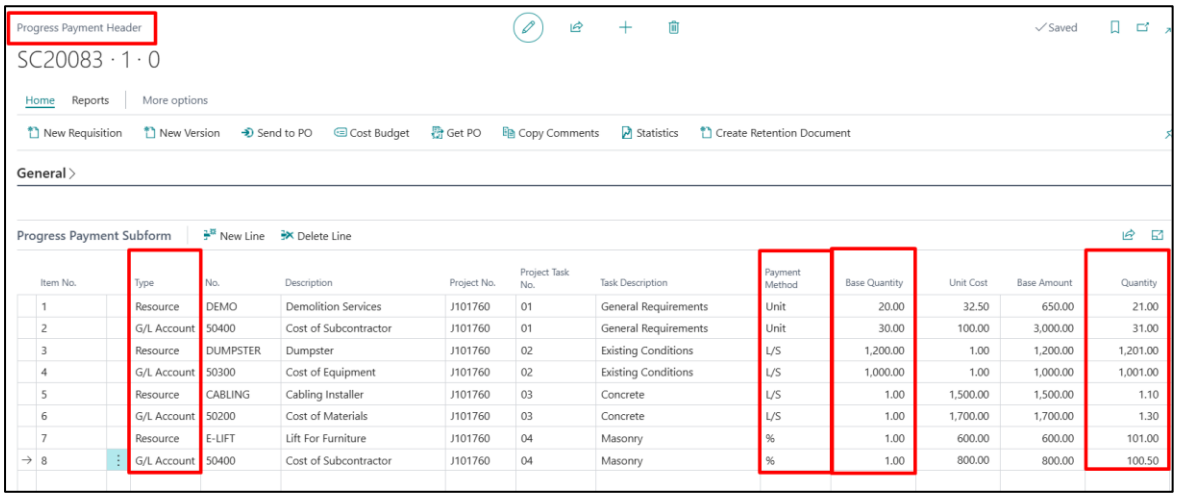


Project No.	Description	Business Lines	Geographic Code	Estimator	Manager	Bill To Customer	Start Date	Estimated Completion Date	Last Costing Date	Last Billing Date	Original Contract Price	Original Budgeted Cost	Original Estimated Gross Profit	Original GM %	Change Orders
J08190	PE-476-		SER			Skinner Glass									
J08190.01	Pe-471 Master 1		SER			Skinner Glass		03/01/25	02/11/26	05/22/26	$339,000.00	$295,000.00	$44,000.00	12.98%	$0.00
J08190.01.01	Pe-471 sub-1		SER			Skinner Glass			02/19/26		$114,500.00	$87,500.00	$27,000.00	23.58%	$121,000.00
J08190.02	PE-476- Master 2		SER			Skinner Glass			10/06/25		$139,500.00	$115,000.00	$24,500.00	17.56%	$288,400.00

ADO-5004

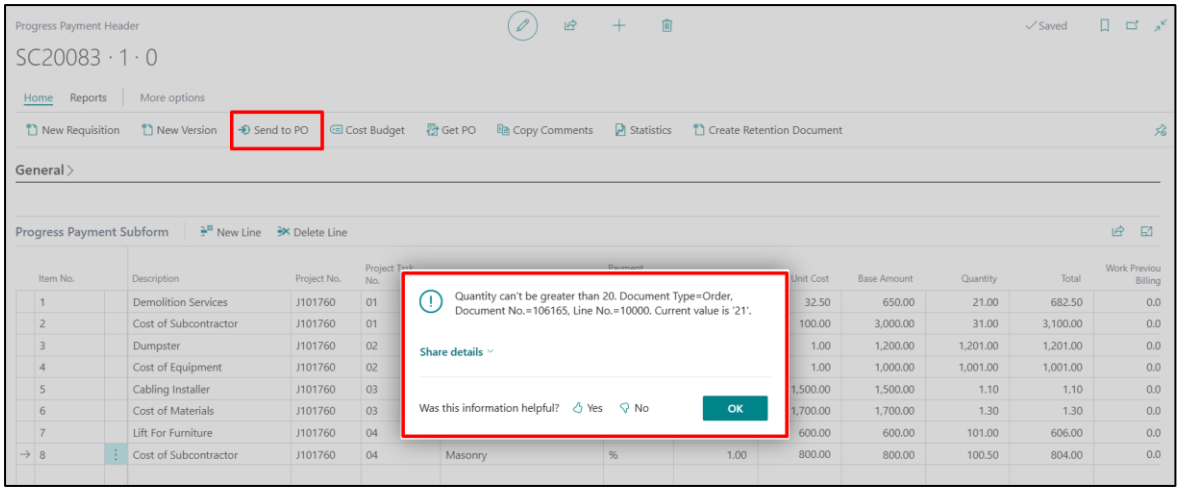
Enhancement – Progress Payment Quantity Validation for Resource and G/L Account Lines

Enhanced the **Progress Payment** process by introducing quantity validation for **Resource** and **G/L Account** lines during the **Send to PO** action.



The system now ensures that the entered Quantity does not exceed the **Base Quantity** for **Unit** and **L/S** payment methods or **100** for the % payment method.

If the limit is exceeded, a validation error displays the relevant Purchase Order and Line details, preventing incorrect quantities from being updated on the Purchase Order.

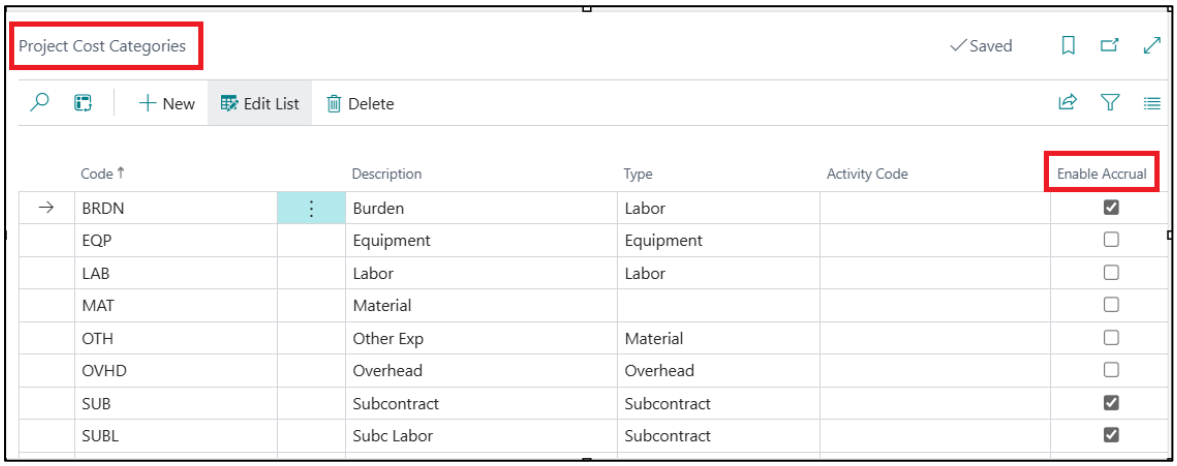


ADO-5111

New Feature – Purchase Order Accrual Project Cost - G/L Entries

A new “G/L Cost Accrual” functionality has been introduced to recognize project costs at the time of posting the Purchase Receipt.

Added the “Enable Accrual” option in Project Cost Categories.



In the Purchases & Payables Setup, new fields are added: “Enable G/L Cost Accrual”, “G/L Accrual Journal Template and Batch”.



The system automatically creates **Project Ledger Entries** and related **G/L Accrual Entries** at the time of posting the **Purchase Receipt**.

When all conditions are met:

- **Purchase Line Type = G/L Account**
- **Cost Category Accrual Enabled**

ADO-5214

Enhancement – Burden Calculation for Usage with Positive Amount Conflict with "Update Project Item Cost" Batch

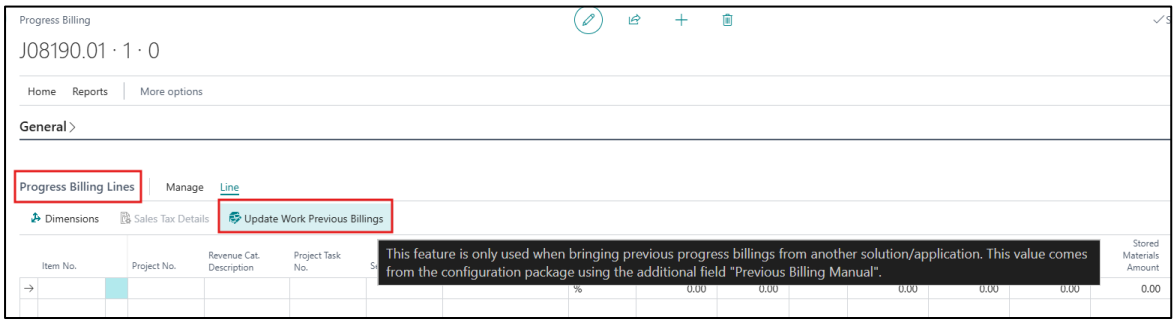
The Burden calculations are now enhanced to ensure correct values in project ledger entries when positive Usage transactions are posted. You no longer need to run the “Update Project Item Cost” batch when it is enabled to auto-run in the project setup.

ADO-4632

Enhancement – Progress Billing - Progress Billing Lines and Tooltips

The lines fast tab on the Progress Billing card is renamed from “Progress Billing Subform” to “Progress Billing Lines”.

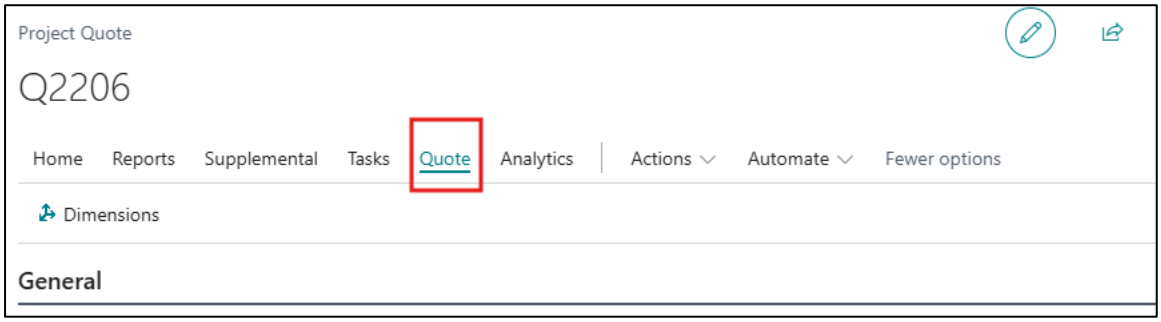
A tooltip has been added for the action button “Work Previous Billings” on the lines tab.



ADO-5242

Enhancement – Project Quote - Workflow Section on the Ribbon

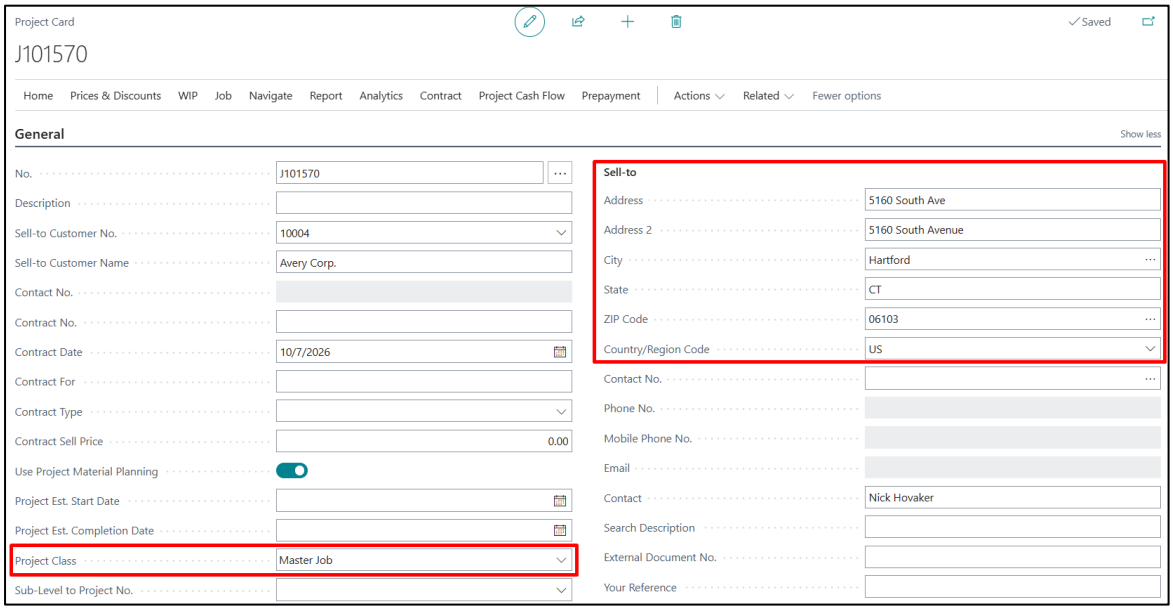
The section “Workflows” on the ribbon of the Project Quote card has been corrected to “Quote”.

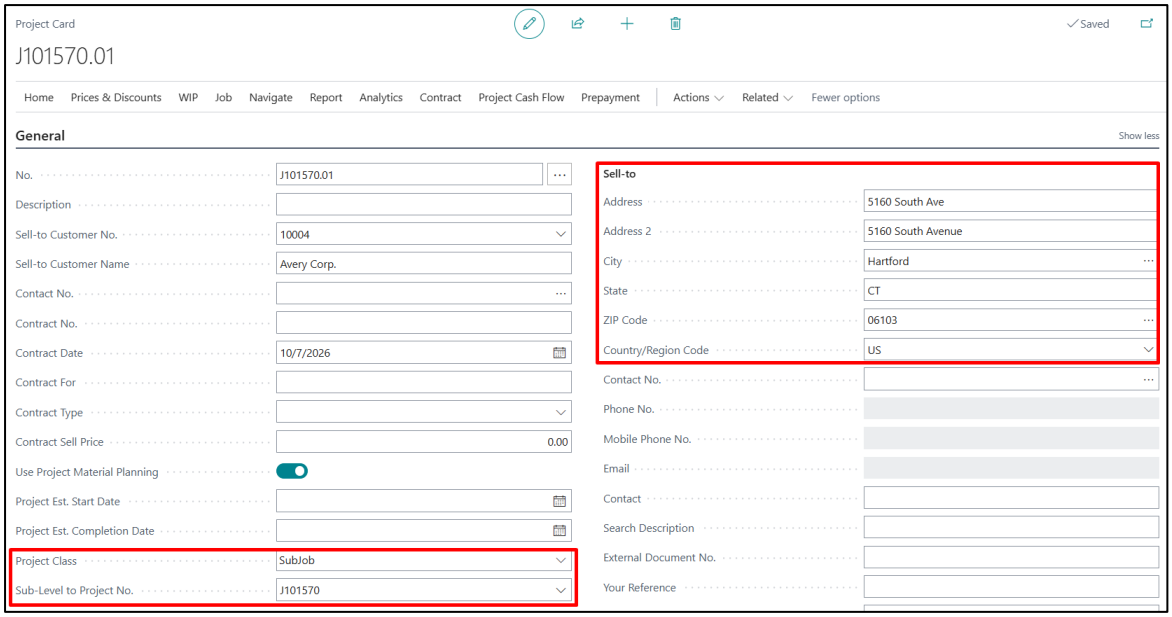


ADO-5256

Improvement – Sub-Level Customer Address Inheritance from Parent Project

Enhanced the **Sell-to Address** inheritance process to ensure that newly created **Sub-Projects, Change Orders**, and **Change Order Quotes** retain the address details from their immediate parent Project.



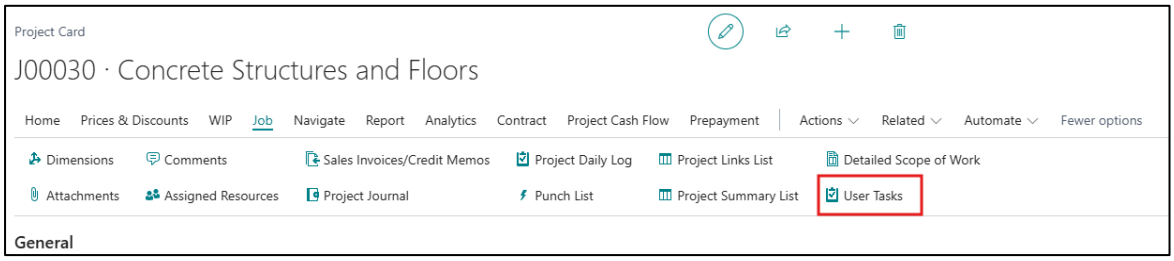


For **Change Order Quotes**, the address details are retained at the table level without adding new fields to the Quote page.

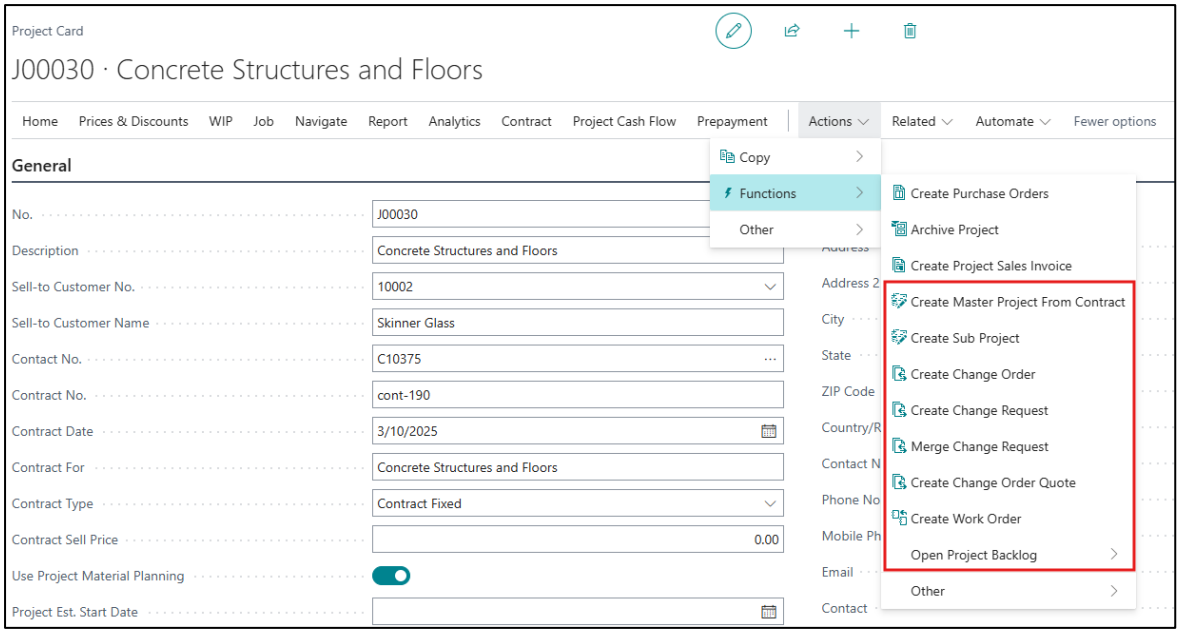
ADO-5091

Enhancement – Reposition "User Tasks" and Create Options on the Project Card Ribbon

The “User Tasks” option on the ribbon of the project card has been moved from the “Prices & Discounts” section to the “Job” section.



The “Open Project Backlog” option and all the “Create” options on the ribbon of the project card have been moved from “Actions” and “Copy”, respectively, to “Functions”.



ADO-4681

Enhancement – Add Tooltips to "Skill Class" Fields in Project Journal

Enhanced the **Project Journal** by updating the tooltip for the active **“Skill Class”** field to clarify how its value is populated when the **Resource No.** is updated or the **Suggest Lines for Crew Timesheet** process is run.

The obsolete **“NS_Skill Class”** and **“NS_Skill Code”** fields were included in the legacy-field cleanup, while **“NS_Skill Code New”** remains at the table level with its existing functionality unchanged.

ADO-5363

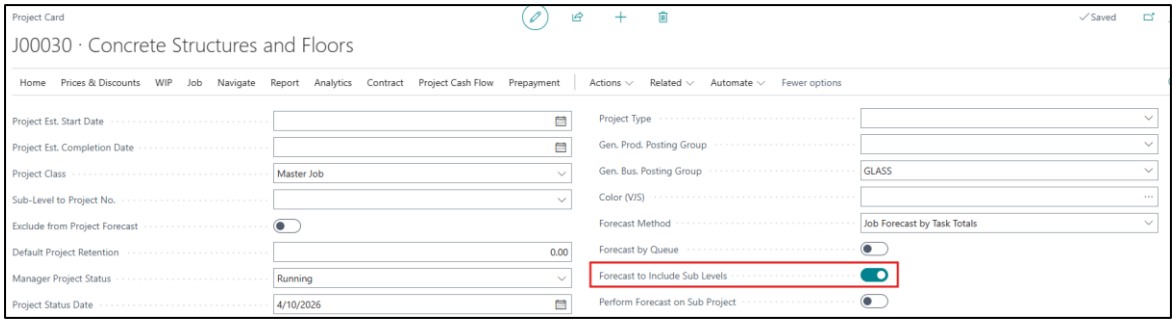
Enhancement – Additional Events for Different Create Sub-Level Projects Option

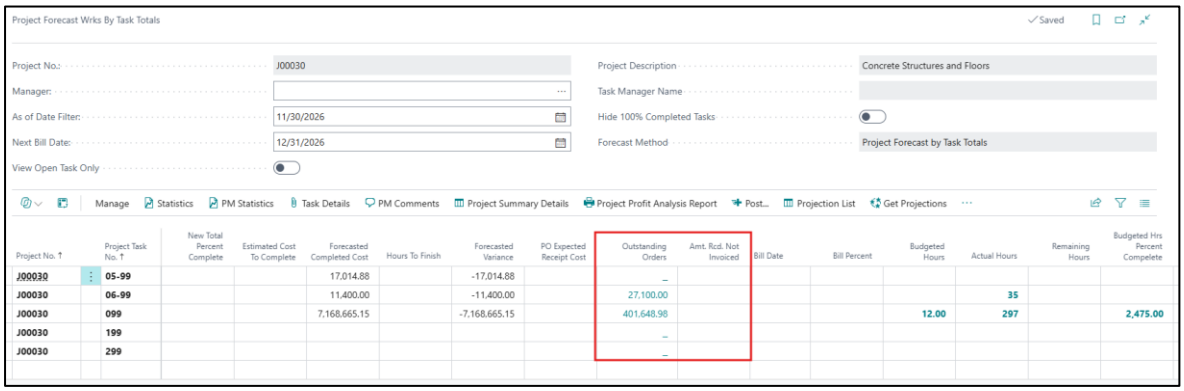
New events are added for the “Create” functions on the project card used to create different types of sub-level projects.

ADO-5389

Enhancement – PFW - "Outstanding Orders" and "Amt. Rcd. Not Invoiced" with Sub-Levels

The columns “Outstanding Orders” and “Amt. Rcd. Not Invoiced” on the project forecast worksheet now include the sub-level project’s values as well when their parent project is marked with “Forecast to Include Sub-Levels” on the project card.

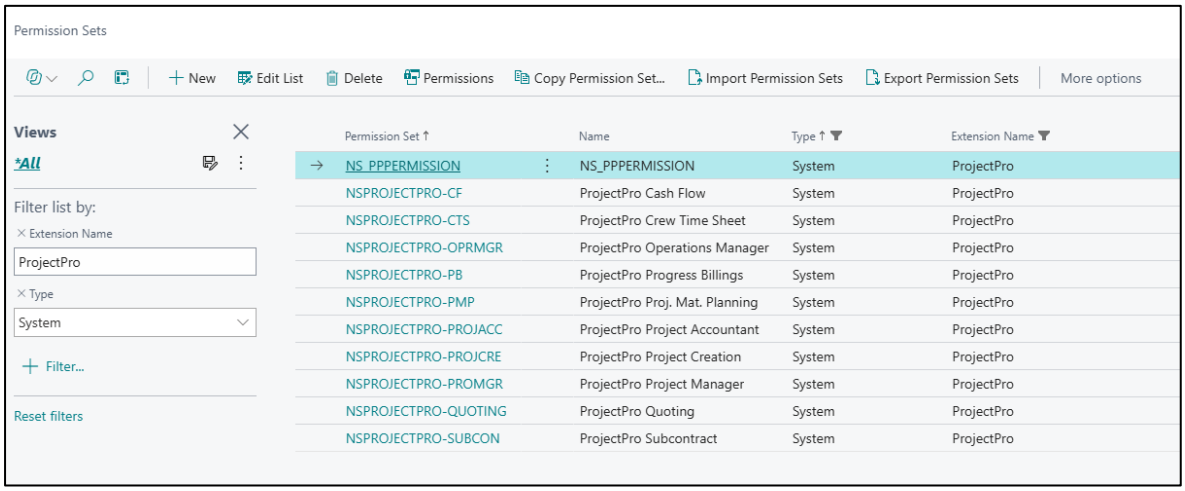




ADO-5456

New Feature – ProjectPro Process-Based Roles and Permissions

Every customer installing the ProjectPro application from Microsoft Marketplace now has access to a standard set of predefined, process-based permission sets. This will enable customers to manage user access more effectively, improve application security, and simplify permission administration across different ProjectPro business processes.



ADO-5003

Improvement – PMP Page Locking During Purchase Order Creation

The page locking issue caused while trying to open the Project Material Planning Worksheet in below use case has been resolved now.

- A user opens the JMP page and creates a purchase order for the required resources. After the purchase order is created, a confirmation pop-up appears stating that the Purchase Order has been created and asking whether the user wants to navigate to it.
- While this pop-up remains open, the JMP page continues to hold the transaction lock.
- If another user tries to open or access the JMP page during this time, they receive the following error: “We can't save your changes right now, because the data is being updated in a transaction by another user.”
- The error also indicates that the Project Material Planning Worksheet page has to be closed.

ADO-5185

Improvement – PP UI Changes – Tooltips and Obsolete Fields

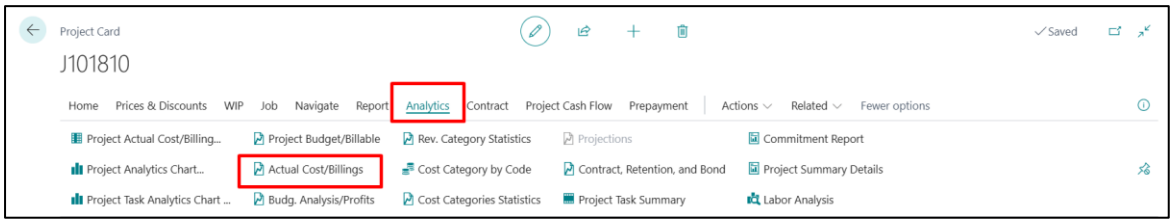
Enhanced multiple **ProjectPro** pages to improve field visibility, caption consistency, and Work Order template selection.

- **Project Card:** Hidden the obsolete **Forecast Type** field and removed the duplicate **Person Responsible** field.
- **Purchases & Payables Setup / Human Resources Setup:** Hidden obsolete setup fields.
- **Customer Selection Lookup:** Added **City, State or County, and Post Code** columns to the Customer lookup displayed when selecting a Customer on the **Project Card**, with sorting and filtering support.
- **Work Order:** Updated template selection to use the **Service Work Order Template** flag and **Template** project class.
- **Caption Updates:** Standardized **Task and Crew Code** captions on their respective pages.

ADO-5309

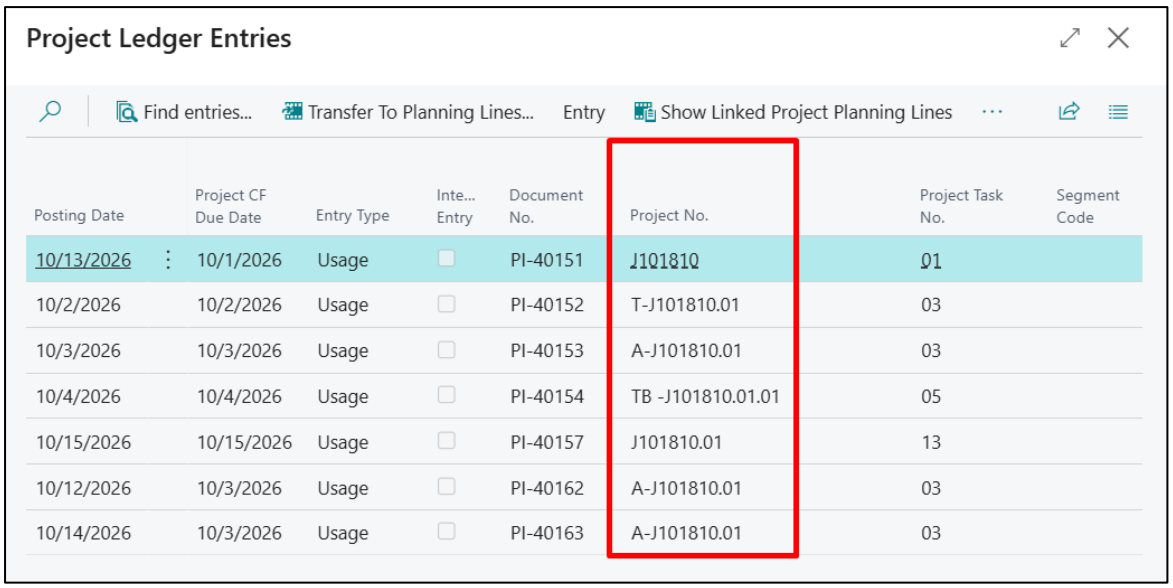
Improvement – Actual Cost/Billings Analytics – CO Numbering

Enhanced the **Actual Cost/Billings** drill-down functionality on the **Project Card** to ensure proper navigation to the relevant ledger entries when linked **Change Orders** have numbers that sort before the master Project No.



The **Actual Cost** and **Invoices Billed** drill-downs now open the applicable **Project Ledger Entries**, while **Payments Rec’d** opens the relevant **Detailed Customer Ledger Entries**.

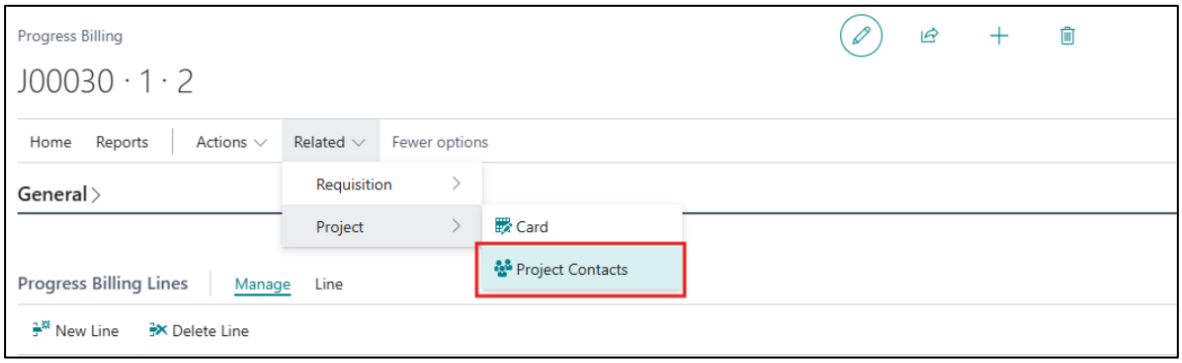
This enhancement resolves the **Working on it…** issue across all date buckets (**Period to Date, Year to Date, and Project to Date**) while retaining accurate master and sub-level project filtering.

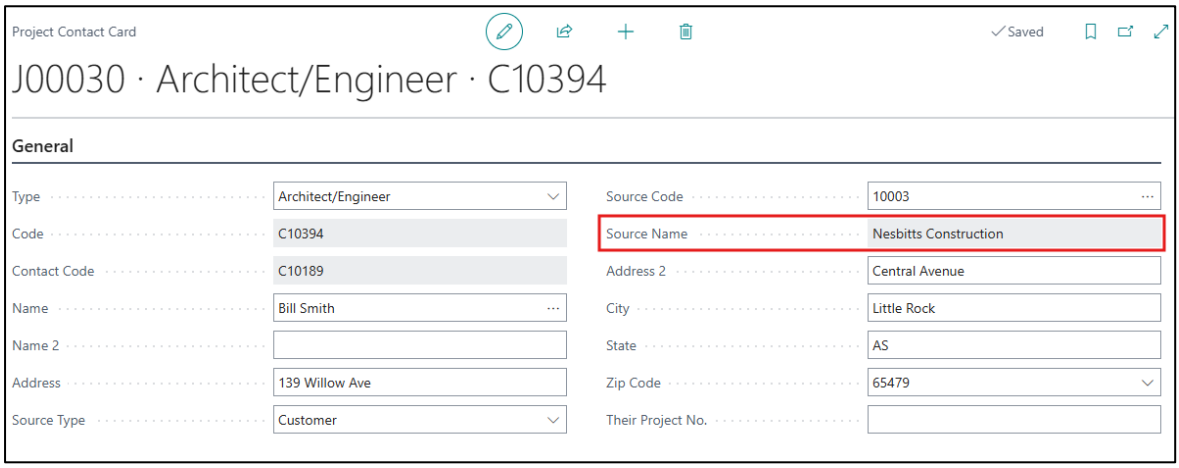


ADO-5313

Improvement – Project Contacts - Update Source Name for Customer via Progress Billings

The “Source Name” is now getting updated on the Project Contacts when created from the progress billings.

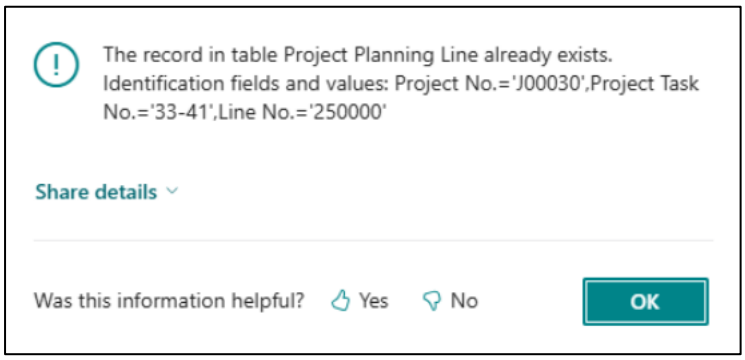




ADO-5314

Improvement – Work Order (R_14021488) and Work Order Completed (R_14021288) Reports - New Entry Creation Conflict

The Work Order reports on the project card now run correctly without receiving the error below.



ADO-5320

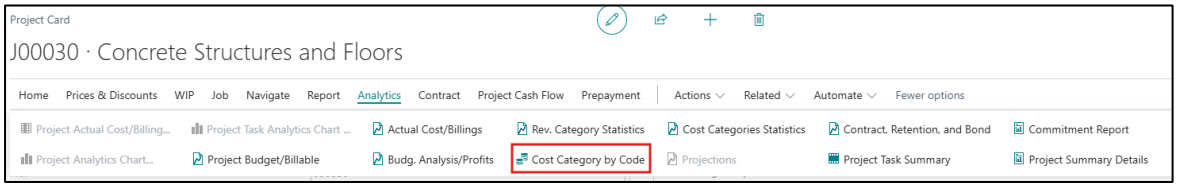
Improvement – General Business Posting Group on a Sales Invoice via Progress Billings

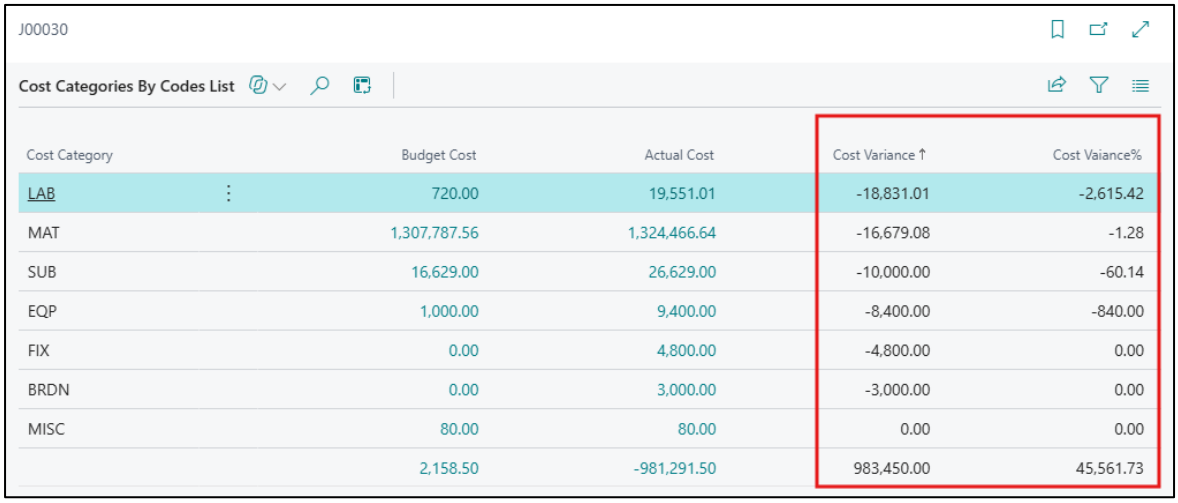
When a Sales Invoice is created via Progress Billings, the general business posting group now derives from the project rather than the customer.

ADO-5328

Improvement – Sorting on "Cost Categories by Codes" List

The “Cost Categories by Codes” list in the Analytics section on the ribbon of the project card now gets sorted correctly for the columns “Cost Variance” and “Cost Variance %”.





Cost Category	Budget Cost	Actual Cost	Cost Variance ↑	Cost Vaiance%
LAB	720.00	19,551.01	-18,831.01	-2,615.42
MAT	1,307,787.56	1,324,466.64	-16,679.08	-1.28
SUB	16,629.00	26,629.00	-10,000.00	-60.14
EQP	1,000.00	9,400.00	-8,400.00	-840.00
FIX	0.00	4,800.00	-4,800.00	0.00
BRDN	0.00	3,000.00	-3,000.00	0.00
MISC	80.00	80.00	0.00	0.00
	2,158.50	-981,291.50	983,450.00	45,561.73

ADO-5364

Improvement – "Default Tasks" Pop-up While Creating a Project

The “Default Tasks” pop-up while creating a new project now considers the points below.

1. **Normal project creation** applies “Use Default Tasks” and the user’s confirmation without consulting the stored copy flag.
2. **Copy Project** suppresses default-task initialization only for the target project being copied.
3. Review the flag’s other consumers before removing it. It also controls project-link creation and forecasts cleanup for non-posting type tasks, so changing only the task-loading check could alter copy behavior.
4. Clears previously persisted true value during the extension upgrade. Once all consumers have migrated, the field retires, and the Refresh action.

ADO-5405

Improvement – Forecast Voiding on Project Summary Details with SubJob

The voiding of the forecast entries for the same dates now works correctly when a Sub Job project class’s project is linked to the parent project.

For projects with Sub Jobs, the previous forecasting entry was voided in Rev Rec Summary Detail, but it was not voided in Project Summary Detail, resulting in multiple entries for the same date.