

Released Update ProjectPro 26.0.8.34832 (NA)

Application Enhancement & Hot Fixes

Update ID	Type	Title	Functional Area
PE-476	New Feature	Introducing a New Project Class, "Contract" at the Highest Level	ProjectPro Basics
PE-670	New Feature	Reports for "Contract" Project Class – Actual vs Budget Work Units by Task, Pct of Completion, Variance Report, Combined AIA G702 and AIA G703	Reports
PE-679	New Feature	Add Rich Text Editor to the Project Quoting	Project Quoting
PE-681	New Feature	Performance Enhancement for Projects List and Project Card	ProjectPro Basics
PE-683	New Feature	Enhance the POC Report at the Master Level when associated with the "Contract Project Class" Project	Reports
PE-684	New Feature	Multi-Project Planning Lines Level Sorting in the Progress Billing Lines	Progress Billings
PE-700	Enhancement	Project Task No. Validation on Payment Journal	Payment Journal
PE-706	Enhancement	FA Purchase Order Posting with Project	ProjectPro Basics
PE-707	Enhancement	Due Date Calculation for Vendor Retention Ledger Entries	Account Payables
PE-709	Enhancement	Exclude CO Quotes from the Project Forecast Worksheet	ProjectPro Basics
PRJCTPR-513	Hot Fix	Duplicate Subcontract Ledger Entries	Subcontract
PRJCTPR-514	Improvement	Copy Project - "Completion Date" and "Revenue Recognized" get copied	ProjectPro Basics
PRJCTPR-515	Improvement	PFW by Task Total - Change to any non-End Total Type Task Line Adding to the PFW	Project Forecast

****Note:** Details are given below in "Release Note Details".

Release Note Details

PE-476

New Feature – Introducing a New Project Class, “Contract” at the Highest Level

- A new Project Class “Contract” has been added to the Project card. This is the highest level of the project, but will have no Budget lines, Billable lines (with exceptions), and no actual cost is incurred for it.

Project Card

J03330 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Actions Related Automate

Contract Date		Resp. Name
Contract For	Master Job	Blocked
Contract Type	SubJob	Last Date Modified
Contract Sell Price	Change Order	Cust. PO No.
Use Project Material Planning	Extra Work	Cust. Project No.
Project Est. Start Date	Proposed	Delivery Instructions
Project Est. Completion Date	Template	Project Type
Project Class	Work Order	Gen. Prod. Posting Group
Sub-Level to Project No.	Change Request	Gen. Bus. Posting Group
Exclude from Project Forecast	Contract	Project Manager

- To create a Master project from the Contract project, a new action button has been created as “Create Master Project from Contract”.
- Since this is the highest level, you are not allowed to assign a Contract job as a sub-level. Hence, the “Sub-Level to Project No.” on a Contract project will be non-editable.

J03330 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Actions Related Automate Fewer options

Use Project Material Planning	1/1/2025	12/31/2025	Contract	Sub-Level to Project No.	
Project Est. Start Date	Project Est. Completion Date	Project Class	Sub-Level to Project No.	Exclude from Project Forecast	Manager

- A new master project will be created for the Contract project.

Project Card

J03330.001 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Actions Related Automate

Project Est. Start Date External Document No.

Project Est. Completion Date Your Reference

Project Class Person Responsible

Sub-Level to Project No. Resp. Name

Exclude from Project Forecast ☐ Blocked

- You are now allowed to change any project to a Contract project class if the “Sub-level to Project No.” value is defined.

J03330.001 · Building Construction

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Actions Related

✖ The page has an error. [Refresh \(F5\)](#) to undo the change, or correct the error.

Project Est. Completion Date

Project Class **✖** Person Responsible

Sub-Level to Project No. Resp. Name

Exclude from Project Forecast ☐ Blocked

Manager Last Date Modified

If you want to change project class as "contract" then sub-level to project number should be blank

- The contract project is used for collective billing of all the multi-tier sub-level projects together through Progress Billing.

Projects: Custom filtered								
No. ↑	Description	Project Class	Sub-Level to Project No.	Change Request to Project No.	Budgeted Cost (\$)	Budgeted Price (\$)	Usage (Cost) (\$)	Invoiced Price (\$)
J01355	Testing of POC Case-1	Contract			0.00	0.00	0.00	0.00
J01355.001	Testing of POC Case-1	Master Job	J01355		140,000.00	170,000.00	110,000.00	128,500.00
J01355.001.001	POC Master-1 Sub-Order1	SubJob	J01355.001		141,000.00	180,000.00	125,000.00	106,000.00
J01355.001.001.001	POC Case-1 Change Order-1	Change Order	J01355.001.001		70,000.00	90,000.00	45,000.00	63,000.00
J01355.002	POC Case-1 Master -2	Master Job	J01355		210,000.00	260,000.00	180,000.00	152,500.00
J01355.002.001	Testing of POC Case-1 Master -2	SubJob	J01355.002		110,000.00	130,000.00	90,000.00	91,000.00
J01355.002.002	Testing of POC Case-1 Master -2	Change Order	J01355.002		75,000.00	85,000.00	45,000.00	68,000.00
J01355.003	POC Case-1 Master-3	Master Job	J01355		150,000.00	175,000.00	120,000.00	105,000.00
J01355.003.001	Testing of POC Case-1 Master-3	SubJob	J01355.003		85,000.00	115,000.00	85,000.00	57,500.00

- If the “Get Billings” function is used, then enter the contract Project No. in stars, e.g., *J01355*, to get all the Billables of all the related projects (master and their multi-tier sub-levels).

Progress Billing

J01355 · 3 · 0

Home Reports Actions Related Fe

General

No. J01355

Requisition No.

Version No.

Project No. J01355

Project Name Testing of PC

Draw No.

Customer No. 10000

Customer Name Porter's Exca

Manager

Get Contract for Progress Bill

Filter: Project

< No. *J01355*

< Progress Billing No.

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

- If the “Get Project Planning Lines” function is used, then a newly introduced “Is Contract” Boolean is set to True automatically, which shows all the Billable planning lines of all the related projects (master and their multi-tier sub-levels).

Progress Billing

J01355 · 3 · 0

Home Reports Actions Related Fe

Project Name Testing of PC

Draw No.

Customer No. 10000

Customer Name Porter's Exca

Manager

Manager Name

Person Responsible

Person Responsible Name

Round Amounts

Final

Multiple Retention % on Lines

Get Project Planning Lines

Project No. J01355

Is Contract ☒

Change Order No.

Filters

From Date

To Date

Revenue Category

OK Cancel

- The related Project No. will be displayed on the progress billing lines, and the invoiced amount will impact the related project itself. Hence, no impact or no budget/billable and actual/invoiced amount is attached to the Contract project, but you are eligible to perform billings of all the projects under one project.

PE-679

New Feature – Add Rich Text Editor to the Project Quoting

A new fast tab has been added to the Project Quote titled “Detailed Scope of Work”. This is a Rich Text Editor field.

The screenshot shows the 'Project Quote' interface for quote Q3003. The 'Detailed Scope of Work' tab is active and highlighted with a red border. It contains a rich text editor with the following content:

Inclusions:

1. Site Preparation & Clearing
 - Tree removal, grading, soil compaction, temporary fencing.
2. Structural Work
 - Foundation, framing, beams, columns, slab, and load-bearing walls.
3. Roofing & Waterproofing
 - Installation of shingles/metal roof, waterproof membranes, gutters.
4. Exterior Finishes
 - Cladding, stucco, brickwork, exterior painting.

Below the text is a rich text editor toolbar with various formatting options like bold, italic, underline, link, and list.

This can also be printed on the “Print by Lines” report if you enable “Include Detailed Scope of Work” on the report request page.

The screenshot shows the 'Project Quote' interface for quote Q3003. The 'Reports' tab is active, and the 'Print By Lines' option is selected and highlighted with a red border. A 'Quote/Proposal' dialog box is open, showing the following details:

Quote/Proposal

No.	Q3003
Description	Global Tower Renewation
Site Customer No.	10003
Site Customer Name	Nesbitts Construction
Bill-to Customer No.	10003
Bill-to Customer Name	3844 Coleman Creek Rd.
Contact No.	
Contact Name	
Include Detailed Scope of Work	<input checked="" type="checkbox"/>

At the bottom of the dialog are buttons for 'Send to...', 'Print', 'Preview & Close', and 'Cancel'.

Quotation

ProjectPro UAT26 - NA

 Phone:

 Salesperson :
 Scott Baker

 Sold to:
 Nesbitts Construction
 Tom Nesbitt
 3844 Coleman Creek Rd.
 Brockport

DYNAMICS/RIA.SBN
 08-28-2025
 Page 1

 No. Q3003

 Ship to:
 Nesbitts Construction
 Tom Nesbitt
 3844 Coleman Creek Rd.
 Brockport

Terms: Net 15 days

Detailed Scope of Work

Inclusions:

1. Site Preparation & Clearing
 - * Tree removal, grading, soil compaction, temporary fencing.
2. Structural Work
 - * Foundation, framing, beams, columns, slab, and load-bearing walls.
3. Roofing & Waterproofing
 - * Installation of shingles/metal roof, waterproof membranes, gutters.
4. Exterior Finishes
 - * Cladding, stucco, brickwork, exterior painting.
5. Interior Finishes
 - * Drywall, flooring (tiles/wood), ceilings, painting, and cabinetry.

No.	Description	Unit Price	Amount
099	Procurement and Contracting Requirements-Total	\$37,000.00	\$37,000.00

PE-681

New Feature – Performance Enhancement for Projects List and Project Card

A new page, “ProjectPro UI/UX Setup”, has been created. This controls the fast tabs of the project card. Enabling the setup will disable the corresponding fast tabs on the project card.

Note: Click on “New (+ Sign)” when setting up this page for the first time for an entity.

ProjectPro UI/UX Setup

Project Card

Disable Budg. Analysis/Profits ☐

Disable Revenue Category Statistics ☐

Disable Cost Category Statistics ☐

Disable Project Budget/Billable ☐

Disable Projections ☐

Disable Actual Cost/Billings ☐

PE-683

New Feature – Enhance the POC Report at the Master Level when associated with the "Contract Project Class" Project

The “Pct of Completion” report is enhanced to run on the Master Project when it is assigned as a sub-level to the Contract project.

PE-684

New Feature – Multi-Project Planning Lines Level Sorting in the Progress Billing Lines

A new feature has been added to sort the Project Planning Lines for Progress Billings.

- **Project Planning Lines – Billing Line Sorting Sequence**
 - You can now set the sorting sequence on the billing planning lines using the “Billing Line Sorting Sequence” to be used on the Progress Billings, such as clubbing the Types (item, resource, g/l) together, clubbing the Task No., or by other relevant fields.
 - The sorting sequence can be assigned across different levels of the projects to see a particular type of line together on the progress billing.
 - This allows users to quickly locate specific categorization or entries, which improves visibility and efficiency.

J01370.001 Constuction of Resident building Master-1 001 General Requirements														✓ Saved		
Project Planning Lines														+ New Edit List Delete Home Report Actions Related Reports Fewer options		
Project Task No. ↑	Line Type	Planning Date	Contract Forecast Date	Planned Delivery Date	Document No.	Type	No.	Get Linked Resource	Description	Cost Category	Progress Billing Method	Progress Billing Link Code	Billing Line Sorting Sequence			
→ 001	Budget	7/1/2025	7/1/2025	7/1/2025		Resource	DUMPSTER	<input type="checkbox"/>	Dumpster	MAT			1			
001	Billable	7/1/2025	7/1/2025	7/1/2025		Resource	DUMPSTER	<input type="checkbox"/>	Dumpster	MAT	%		1			
002	Budget	7/1/2025	7/1/2025	7/1/2025		Item	AIR-INLET-C...	<input type="checkbox"/>	Air Inlet Combustio...	MAT			2			
002	Billable	7/1/2025	7/1/2025	7/1/2025		Item	AIR-INLET-C...	<input type="checkbox"/>	Air Inlet Combustio...	MAT	Unit		2			
003	Budget	7/1/2025	7/1/2025	7/1/2025		Item	BM193181	<input type="checkbox"/>	Drill Kit 8-18	MAT			3			
003	Billable	7/1/2025	7/1/2025	7/1/2025		Item	BM193181	<input type="checkbox"/>	Drill Kit 8-18	MAT	Unit		3			

- **Integration with Progress Billing and its Reports**
 - Sorting applied in the Project Planning Lines will reflect in the Progress Billing lines.
 - You can modify the sequence directly in the Progress Billing lines as well. This does not back update the planning lines with the modified sequence here.
 - The Progress Billing reports will display data according to the applied sorting using the setting “Use Line Sorting Sequence” added to the report request pages, ensuring consistency between the user view and generated reports.

Progress Billing

J01370 · 3 · 0

Home Reports Actions Related Fewer options

Progress Billing Subform Manage Line

New Line Delete Line

Item No.	Project No.	Revenue Cat. Description	Project Task No.	Segment Code	Description	Billing Method	Base Amount	Quantity	Unit of Measure Code	Total	Work Previous Billings	Wor
1	J01370.001		001		Dumpster	%	180,000.00	40.00	LOADS	72,000.00	72,000.00	
20	J01370.002.001		003		Dumpster	%	25,500.00	40.00	LOADS	10,200.00	10,200.00	
22	J01370.002.002		008		Dumpster	%	195,000.00	35.00	LOADS	68,250.00	68,250.00	
24	J01370.002.003		008		Dumpster	%	15,000.00	45.00	LOADS	6,750.00	6,750.00	
2	J01370.001		002		Air Inlet Combustion Damp...	Unit	13,000.00	6.00	EA	78,000.00	78,000.00	
3	J01370.001		003		Drill Kit 8-18	Unit	8,500.00	7.00	EA	59,500.00	59,500.00	

Progress Billing

J01370 · 3 · 0

Home Reports Actions Related Fewer options

Progress Billing Subform Manage Line

New Line Delete Line

Retention

Combined CO Progress Billing Invoice

Printer (Handled by the browser)

Report Layout ./Layouts/NSProgress Billing Invoice CO....

Options

Use Line Sorting Sequence ☒

Filter: Progress Billing Header

X No. J01370

X Requisition No. 3

X Version No. 0

Send to... Print Preview & Close Cancel

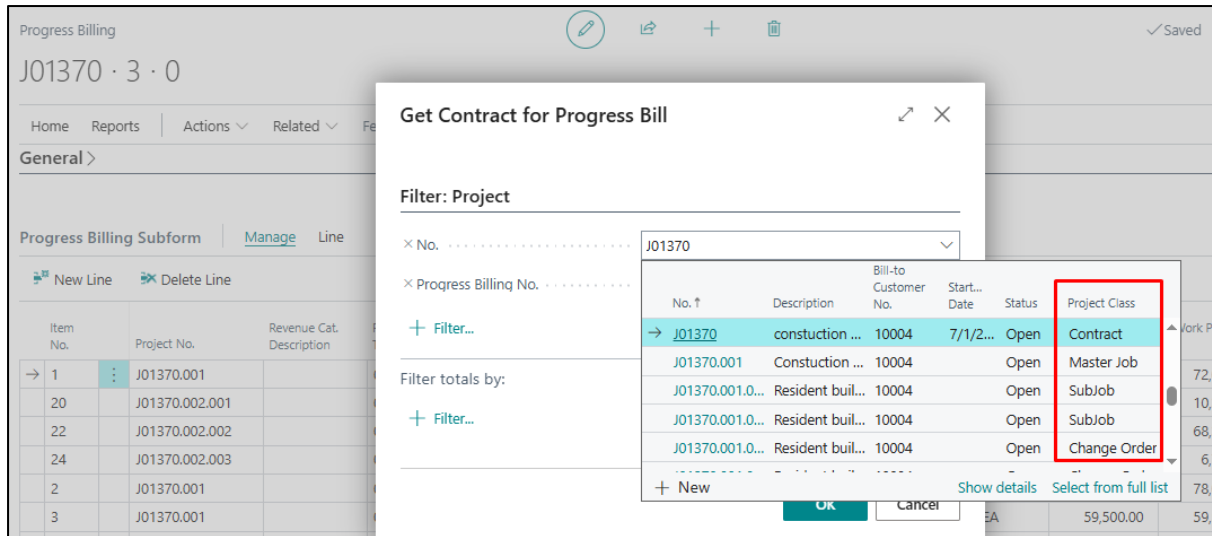
Progress Billing No.: J01370-3-0 Period To: 08/15/2025

Requisition Date: 08/21/2025 Page 2 of 2

Item	Description	Scheduled Value	Previous Period	This Period	Materials Presently Stored	Total Completed and Stored	%	Balance To Finish	Retention
1	Dumpster	180,000.00	72,000.00	0.00	0.00	72,000.00	40.00	108,000.00	7,200.00
20	Dumpster	25,500.00	10,200.00	0.00	0.00	10,200.00	40.00	15,300.00	1,020.00
22	Dumpster	195,000.00	68,250.00	0.00	0.00	68,250.00	35.00	126,750.00	6,825.00
24	Dumpster	15,000.00	6,750.00	0.00	0.00	6,750.00	45.00	8,250.00	675.00
2	Air Inlet Combustion Damper	130,000.00	78,000.00	0.00	0.00	78,000.00	60.00	52,000.00	7,800.00
3	Drill Kit 8-18	102,000.00	59,500.00	0.00	0.00	59,500.00	58.33	42,500.00	5,950.00
13	Drill Kit 8-18	33,000.00	27,500.00	0.00	0.00	27,500.00	83.33	5,500.00	2,750.00
18	Drill Kit 8-18	48,000.00	32,000.00	0.00	0.00	32,000.00	66.67	16,000.00	3,200.00
56	Drill Kit 8-18	81,000.00	63,000.00	0.00	0.00	63,000.00	77.78	18,000.00	6,300.00
5	Drill Kit 8-18	90,000.00	45,000.00	0.00	0.00	45,000.00	50.00	45,000.00	4,500.00
4	Cabling Installer	60,000.00	27,000.00	0.00	0.00	27,000.00	45.00	33,000.00	2,700.00
6	Cabling Installer	130,000.00	65,000.00	0.00	0.00	65,000.00	50.00	65,000.00	6,500.00
17	Cabling Installer	24,000.00	12,000.00	0.00	0.00	12,000.00	50.00	12,000.00	1,200.00

- Additional Enhancements to "Get Billings" Function

- User-specific sorting is applied at the “Get Billings” line, i.e., the lines will be added to the progress billing lines based on the sorting sequence set on the project planning lines.
- The “Project Class” is displayed in the dropdown for better context.



Expected Outcome:

- Faster navigation and improved accuracy in both planning and billing modules.
- Consistent reporting and enhanced user experience.

PE-700

Enhancement – Project Task No. Validation on Payment Journal

On the Payment Journal, when “Project No.” and “Draw No.” are defined but “Project Task No.” is blank, the system should skip creating a Project Ledger Entry as previously and still allow posting.

The system should bypass Project Ledger Entry creation and allow successful posting of the transaction when the following conditions are met:

- The “Bal. Account Type” field is "G/L Account"
- The “Document Type” is “Payment” or “Refund”
- The "Project No." field is not blank
- The "Project Task No." field is blank
- The "Draw No." field is not blank

This ensures posting can proceed without error.

Payment Journals

✓ Saved

Batch Name

CASH

Manage

Home

Prepare

Check

Request Approval

Bank

Line

Actions

Related

Fewer options

Print Lien ReleasesPostRenum Document NumbersApply Entries...Reconcile

Posting Date	Pay... Ref...	Amount	Bal. Account Type	Bal. Account No.	Project No.	Project Task No.	Draw No.	Bal. Led... (Ob...)	Print Lien Release	Proj... Qua...	Proj... Cost Cat...	Subcontract No.	App... (Yes...)	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date
8/17/2025		45,600.00	G/L Account	10500	J00410		J00410-001			1						5/9/2028

Vendor Ledger Entries

Edit List

Home

Entry

Actions

Fewer options

Show Document

Apply Entries

Create Payment

Reverse Transaction...

Navigate

Posting Date	Document Date	Document Type	Document No.	External Document No.	Original Amount	Amount	Amount (\$)	Orig... Pmt. Disc. Pos...	Remaining Pmt. Disc. Possible	Open	Project No.	Subcontract No.	Draw No. ↓	Pay when paid	Lien Release Print Status
→ 8/17/2025	8/17/2025	Payment	G04001		45,600.00	45,600.00	45,600.00	0.00	0.00		J00410		J00410-001		

Reason for Changing the Logic:

When a Payment Journal entry is created with “Bal. Account Type = G/L Account” and uses “Applies-to Doc. No.”, the system auto-fills the “Project No.” but leaves the “Project Task No.” blank. Since both fields are non-editable, the system requires a Project Task No. if Project No. is present. This causes a posting error and blocks the transaction.

PE-706

Enhancement – FA Purchase Order Posting with Project

On the purchase lines, if the Type is “Fixed Asset”, the user will not be allowed to add a “Project No.” and vice versa on the Purchase Order, Purchase Invoice, Purchase Quotes, and Purchase Credit Memo.

The user should select the “FA Job No.” on the purchase lines for Type = Fixed Assets.

PE-707

Enhancement – Due Date Calculation for Vendor Retention Ledger Entries

For vendor ledger entries where the Retention Ledger Code is set to “Retention”, the “Due Date” calculation logic has been changed to: **Due Date = Posting Date + Purchase Retention Period**

Posted Purchase Invoice ✎ 🔗 + 🗑️ ✓ Saved

PPI-10130 · AT&T Phone Service

Home Print/Send Invoice Incoming Document Actions ▾ Related ▾ Fewer options

Mobile Phone No.		Project Purchaser	
Email		Project Manager	
Contact	Mark Moore	Retention Docum... ..	<input type="checkbox"/>
Posting Date	12/31/2024	Subcontract No.	
Tax Date	12/31/2024	Draw No.	
Document Date	12/30/2024	Progress Payment... ..	No
Due Date	1/14/2025	Multiple Retentio... ..	<input type="checkbox"/>

Projects Setup

Actions ▾

Retention

Sales Retention Peri... ..	1Y	Retention Payable L... ..	RETENTION ▾
Purchase Retention	1Y	Calc Payable Retenti... ..	<input checked="" type="checkbox"/>
Retention Receivabl... ..	RETENTION ▾	A/R Retention Calc	3 - Calc tax on sale less th ▾
		A/P Retention Calc	3 - Calc tax on purchase le ▾

Vendor Ledger Entries 🔍 🔗 🗑️

🔍 Edit List Home Entry Actions ▾ Fewer options 🔗 🗑️

Show Document ▾ Apply Entries ▾ Create Payment Reverse Transaction... Navigate

Posting Date ↓ ▾	Document Date	Retention Ledger Code	Curr... Code ↓	Pay... Met... Code	Pay... Ref...	Cre... No.	Original Amount	Amount	Amount (\$)	Remaining Amount	Remaining Amt. (\$)	Sal. Ledger No. (Obsolete)	Due Date	Print Discount Date
12/31/2024	12/30/2024	NORMAL					-12,825.00	-12,825.00	-12,825.00	-12,825.00	-12,825.00		1/14/2025	12/30/2024
→ 12/31/2024	12/30/2024	RETENTION					-1,425.00	-1,425.00	-1,425.00	-1,425.00	-1,425.00		12/31/2025	12/30/2024

Reason for Changing the Calculation Logic:

- If a document was created on a specific date (Document Date), but
- Was posted partially across multiple posting dates.

Under the previous logic, all partial postings derived the same due date from the original “Document Date”, which was not aligned with actual posting timelines.

Note: This impact only applies to new vendor ledger entries.

PE-709

Enhancement – Exclude CO Quotes from the Project Forecast Worksheet

Change Order Quotes have been excluded from the Project Forecast Worksheet. It will now only be included after it is converted into a Change Order.

PRJCTPR-513

Hot Fix – Duplicate Subcontract Ledger Entries

While posting the purchase invoice from the sub-contract, duplicate Subcontract Ledger Entries were being created. As a result, the cost was also doubled in the "Cost Category" tab of the Subcontract.

PRJCTPR-514

Improvement – Copy Project Function – "Completion Date" and "Revenue Recognized"

The "Completion Date" and "Revenue Recognized" fields no longer get copied while copying a Project.

PRJCTPR-515

Improvement – PFW by Task Total – Change to any non-End Total Type Task Line Adding to the PFW

When a project is set with "Forecast Method = Job Forecast by Task Totals", and if any change is made to a task line with its Type not being set to "End Total", then that task is added to the project forecast. This has been fixed now.