

## Released Update ProjectPro 26.0.19.34832 (NA)

### Application Enhancement & Hot Fixes

Update ID	Type	Title	Functional Area
919	New Feature	Flow of "Detailed Scope of Work" to every Project Class's Project	ProjectPro Basics
997	New feature	VAT/Tax to be included in Prepayment Credit Memo	ProjectPro Basics
1123	New Feature	Project No. Series on "Copy Project"	ProjectPro Basics
1193	Enhancement	Enhance Commitment Report (14021491)	Reports
1215	Enhancement	"Project Task Totals" for "Contract" Project Class	ProjectPro Basics
1122	Enhancement	Project Card - Project Setup to default Project's Status to "Planning" instead of "Open"	ProjectPro Basics
1325	Enhancement	Quote Dimensions to Quote Tasks	Project Quoting
1332	Enhancement	Progress Payment No. Series	Subcontracts
1373	New Feature	Add "Scope of Work" on Subcontracts and on the Subcontract Agreement Report	Subcontracts
1584	Enhancement	Increase Length of "Created By" Field in Cash Flow Worksheet	Cash Flow
1530	Enhancement	Subcontract Process Flow Messages Enhancements	Subcontracts
1615	Enhancement	Creation of Sub-Level Projects (Non-Master) from Contract Project	ProjectPro Basics
1660	New Feature	New Fields for Project Material Planning	Project Material Planning
1249	Hot Fix	Project Quote - Print by Line Report - Doubling Total	Reports
252	Improvement	Quote Estimation Report - Task Descriptions from APOS	Reports
1206	Improvement	PFW Values must not copy from the Project to its Sub-Level	ProjectPro Basics

Update ID	Type	Title	Functional Area
1214	Improvement	Copy Project Function and Sub-Level to Project No.	ProjectPro Basics
1329	Improvement	Flow of "Draw No." from Subcontract Commitment PO to Progress Payment	Subcontracts
1090	Improvement	Dimensions Conflict on Subcontract	Subcontracts
1382	Improvement	PFW - Total Budget Remaining and Forecasted Variance	Project Forecast
1460	Improvement	Flow of "Project Task Type" and "Totaling" to Project Task Lines from Project Activities	ProjectPro Basics
1596	Improvement	PO with Negative Quantity and Payment Terms Code	Account Payables
1512	Improvement	Project Journal - Unable to post 0 Cost Lines	ProjectPro Basics
1658	Hot Fix	Dimension Conflict on Creating Change Order Quote	ProjectPro Basics

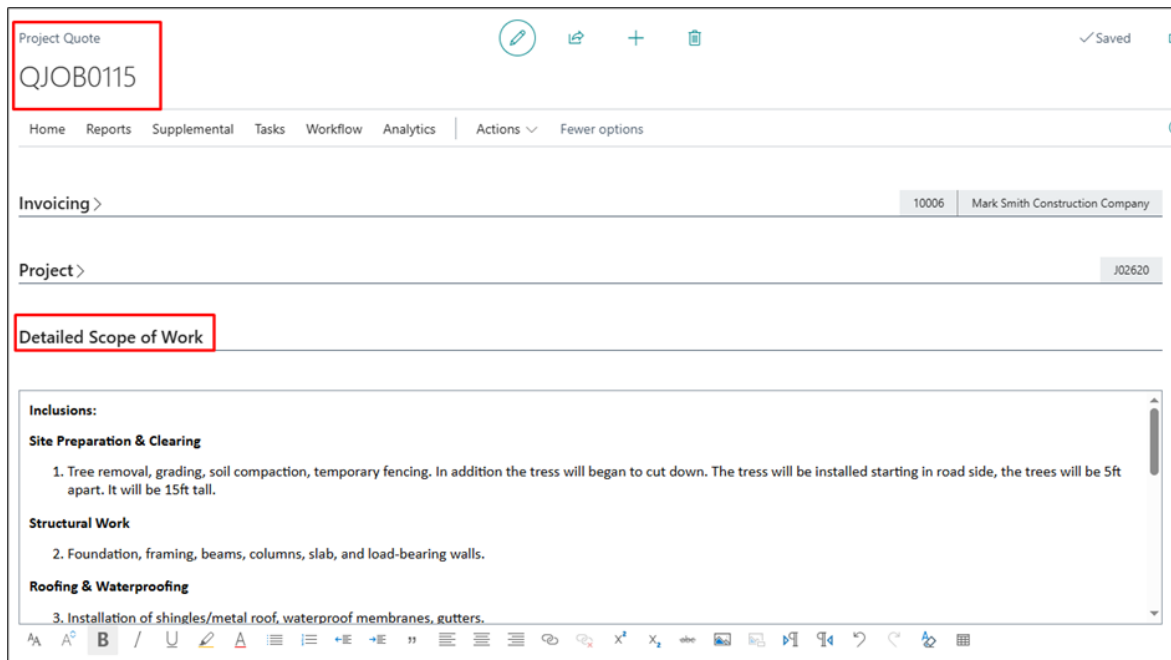
\*\*Note: Details are given below in "Release Note Details".

# Release Note Details

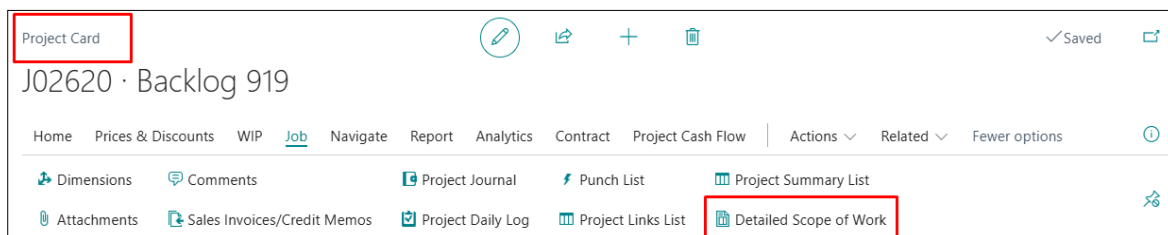
ADO-919

## New Feature – Flow of "Detailed Scope of Work" to every Project Class's Project

The **Detailed Scope of Work** on the Quote card is automatically carried forward to the related Project card when converted from the quote.



It can be accessed on the Project from the "Detailed Scope of Work" action available under the Job section of the ribbon.



This behavior applies irrespective of project classes, ensuring consistent and uniform data flow across all project types.

Project Detailed Scope of Work

J02620 · Backlog 919

**General**

No. ....	J02620	Bill-to Customer No. ....	10006
Description .....	Backlog 919	Name .....	Mark Smith Construction Company

**Detailed Scope of Work**

**Structural Work**

2. Foundation, framing, beams, columns, slab, and load-bearing walls.

**Roofing & Waterproofing**

3. Installation of shingles/metal roof, waterproof membranes, gutters.

**Exterior Finishes**

4. Cladding, stucco, brickwork, exterior painting.

**Interior Finishes**

## ADO-997

### New Feature – VAT/Tax to be included in Prepayment Credit Memo

The Tax has been included in the case of the Prepayment Credit Memo. If the “Tax Liabile” is enabled on the project card, the system will prompt the user to determine whether tax can be included when posting a Prepayment Credit Memo.

*Note: The “Tax Area Code” and “Tax Group Code” assigned on the Project card will flow to the Prepayment Invoice/Credit Memo.*

## ADO-1123

### New Feature – Project No. Series on "Copy Project"

- The “Copy Project” function under the home section of the Projects list ribbon has been renamed to “ProjectPro Copy Project”.
  - The BC standard “Copy Project” can still be accessed from the Actions → Function section of the Projects list ribbon.
- A new option, “Project No. Series”, has been added to the ProjectPro Copy Project function.

ProjectPro UAT26 - NA | Posted Documents | ProjectPro Reports | ProjectPro Reports (Cont.) | All Reports

Projects: All | + New | Delete | Home | Project | WIP | Navigate | Report | Actions | Related | Reports

No.†	Description	Estimate Start Date	Sub-Level to Project No.	Change Request to Project No.	Budgeted Cost (\$)	Budgeted Price (\$)
CRJOB0013	JFW			J00240	0.00	0.00
CRJOB0014	JFW			J00240	0.00	0.00
J00020	Building Construction 110	12/31/2020			22,912.50	465,008.31
J00020.01	Building Construction 110		J00020		0.00	0.00
J00020.02			J00020		0.00	0.00

ProjectPro Copy Project...  
Project Planning Lines (Editable)  
Project Planning Lines  
Subcontracts  
Progress Billings  
Custom Reports  
Create Project Sales Invoice

### ProjectPro Copy Project

**Copy from**

Project No. J00020  
Project Task No. from  
Project Task No. to  
Source Project Planning Lines  
Incl. Planning Line Type Budget+Billable  
Incl. Ledger Entry Line... Usage+Sale  
Starting Date  
Ending Date

**Copy to**

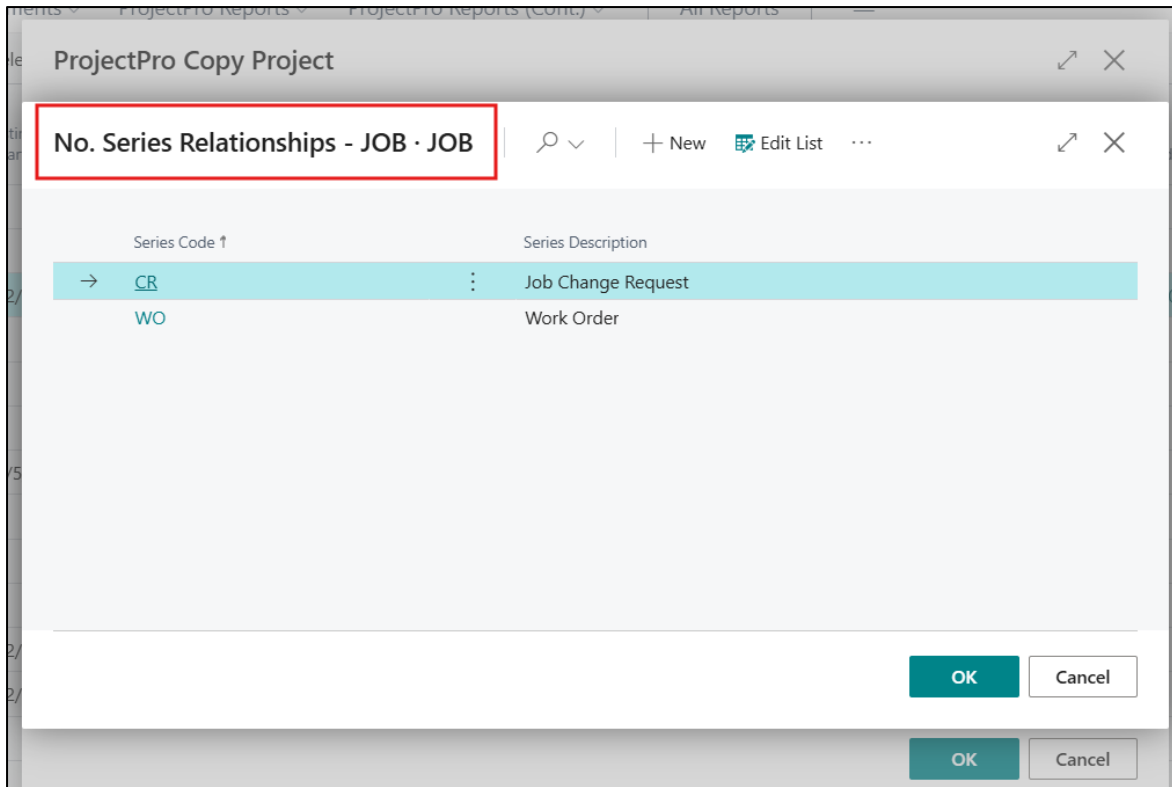
Project No. Series  
Project No.  
Project Description Building Construction 110  
Bill-To Customer No. 10001

**Apply**

Copy Project Prices  Copy Dimensions

OK Cancel

- This works only when there is a Relationship No. Series linked to the default no. series for the Project on the Projects Setup, else this field will remain non-editable.



## ADO-1193

### Enhancement – Enhance Commitment Report (14021491)

The following changes have been implemented in the “Project Commitment Report” available on the Subcontract card.

- Lines with blank data will no longer be printed.
- Commitment Report caption change to “Project Commitment Report”.
- **Vendor Total** is now displayed instead of **Total**.
- **Project Total** is now displayed instead of **Grand Total**.
- A **Report Total** is now shown at the end of the report.
- The report has been changed to landscape mode.

ProjectPro UAT26 - NA												Page 1	
<b>Project Commitment Report</b>													
Job No.	Job Name	Document Number	Vendor/ Subcontractor	Doc. Type	Original Commitment	Change Order Commitment	Revised Commitment	Invoiced Amount	Retention Amount	Payments Issued	% Paid	Payment Progress	Remaining Balance Amt.
J02980.01	Devops-1193	PO-50239	Porter's Concrete	PO	\$ 354,650.00	\$ 0.00	\$ 354,650.00	\$ 248,255.00	\$ 30,411.24	\$ 229,950.00	64.84		\$ 124,700.00
		<b>Vendor Total</b>			<b>\$ 354,650.00</b>	<b>\$ 0.00</b>	<b>\$ 354,650.00</b>	<b>\$ 248,255.00</b>	<b>\$ 30,411.24</b>	<b>\$ 229,950.00</b>	<b>64.84</b>		<b>\$ 124,700.00</b>
J02980.01	Devops-1193	PO-50240	Grainger	PO	\$ 23,097,000.00	\$ 0.00	\$ 23,097,000.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00		\$ 23,097,000.00
J02980.01	Devops-1193	PO-50243	Grainger	PO	\$ 60,000.00	\$ 0.00	\$ 60,000.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00		\$ 60,000.00
		<b>Vendor Total</b>			<b>\$ 23,157,000.00</b>	<b>\$ 0.00</b>	<b>\$ 23,157,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>0.00</b>		<b>\$ 23,157,000.00</b>
J02980.01	Devops-1193	SCJOB0025	AT&T Phone Service	Subcontract	\$ 61,300,000.00	\$ 72,120,000.00	\$ 133,420,000.00	\$ 53,140,000.00	\$ 6,442,000.00	\$ 50,890,000.00	38.14		\$ 82,530,000.00
		<b>Vendor Total</b>			<b>\$ 61,300,000.00</b>	<b>\$ 72,120,000.00</b>	<b>\$ 133,420,000.00</b>	<b>\$ 53,140,000.00</b>	<b>\$ 6,442,000.00</b>	<b>\$ 50,890,000.00</b>	<b>38.14</b>		<b>\$ 82,530,000.00</b>
		<b>Project Total</b>			<b>\$ 84,811,650.00</b>	<b>\$ 72,120,000.00</b>	<b>\$ 156,931,650.00</b>	<b>\$ 53,388,255.00</b>	<b>\$ 6,472,411.24</b>	<b>\$ 51,119,950.00</b>	<b>82.57</b>		<b>\$ 105,811,700.00</b>
J02980.01.0	Devops-1193	PO-50242	Porter's Concrete	PO	\$ 3,750.00	\$ 0.00	\$ 3,750.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00		\$ 3,750.00
		<b>Vendor Total</b>			<b>\$ 3,750.00</b>	<b>\$ 0.00</b>	<b>\$ 3,750.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>0.00</b>		<b>\$ 3,750.00</b>
		<b>Project Total</b>			<b>\$ 3,750.00</b>	<b>\$ 0.00</b>	<b>\$ 3,750.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>0.00</b>		<b>\$ 3,750.00</b>
J02980.02	commitment report testing-1 contract	PO-50241	LeClair Distributors	PO	\$ 2,160,000.00	\$ 0.00	\$ 2,160,000.00	\$ 0.00	\$ 0.00	\$ 0.00	0.00		\$ 2,160,000.00
		<b>Vendor Total</b>			<b>\$ 2,160,000.00</b>	<b>\$ 0.00</b>	<b>\$ 2,160,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>0.00</b>		<b>\$ 2,160,000.00</b>
		<b>Project Total</b>			<b>\$ 2,160,000.00</b>	<b>\$ 0.00</b>	<b>\$ 2,160,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>0.00</b>		<b>\$ 2,160,000.00</b>
		<b>Report Total</b>			<b>\$ 86,975,400.00</b>	<b>\$ 72,120,000.00</b>	<b>\$ 159,095,400.00</b>	<b>\$ 53,388,255.00</b>	<b>\$ 6,472,411.24</b>	<b>\$ 51,119,950.00</b>	<b>82.13</b>		<b>\$ 107,975,450.00</b>

## ADO-1215

### Enhancement – "Project Task Totals" for "Contract" Project Class

The Project Task Totals now work on the project with Project Class as "Contract". Since this is the highest level of the project and no values or transactions are created under this project class, every project under this one is counted as a sub-level (including master projects). Hence, only the Sub-Level columns will show the values.

Earlier, this used to work only for the Master and the Sub-Level projects.

Project Card  
J00220 · Building #22

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Project Cash Flow Actions Related Fewer options

Project Planning Lines Project Task Lines Progress Billings Create Warehouse Pick Crews **Project Task Totals** Project Contacts

Next Project Material Planning Custom Reports Draws Project Task Line Worksheet Links Project Segments

Previous Subcontracts Create Inventory Pick Project Forecast Worksheet ProjectPro AI APO Links Post Prepayment Invoice...

Project Est. Start Date Project Est. Completion Date

**Project Class** Contract

Sub-Level to Project No. Default Project Retention 0.00

Locked Planning Lines Exist Project Purchaser Project Purchaser Name Forecast Method Job Forecast by Task Code Forecast to Include Sub Levels

J00220 · Building #22

Project Tasks All Levels Actions

Project Task No. 1	Description	Project Task Type	Totalling	Budget, Project Level	<b>Budget, SubLevel</b>	Budget, Total	Actual, Project Level	<b>Actual, SubLevel</b>	Actual, Total	Contract, Project Level	<b>Contract, SubLevel</b>	Contract
01-11	Summary of Work	Posting		-	350,000.00	350,000.00	-	0.00	0.00	-	0.00	
03-00	Concrete	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	
03-11-13	Structural Cast-in-Place Concre...	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	
099	Procurement and Contracting ...	End-Total	000.099	-	350,000.00	350,000.00	-	0.00	0.00	-	0.00	
100	Specialties Requirements	Begin-Total		-	0.00	0.00	-	0.00	0.00	-	0.00	
101	Equipment	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	
102	Furnishings	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	
103	Special Construction	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	
104	Conveying Equipment	Posting		-	0.00	0.00	-	0.00	0.00	-	0.00	

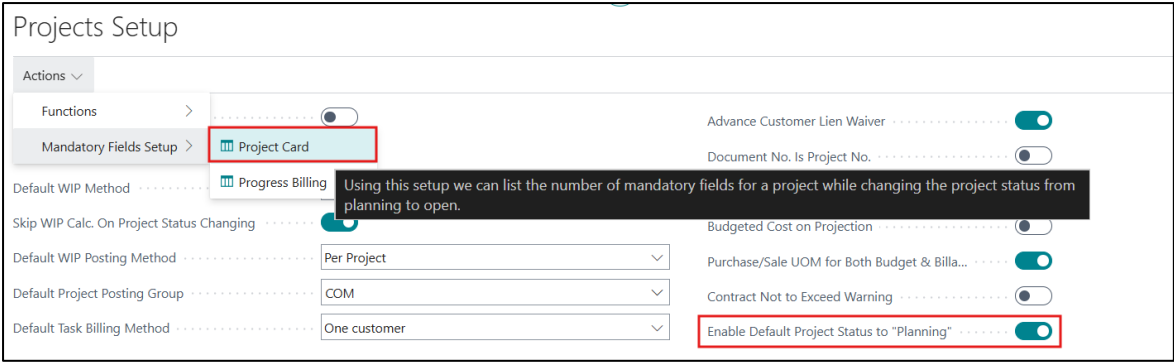
## ADO-1122

### New Feature – Project Card - Project Setup to default Project's Status to "Planning" instead of "Open".

A new Projects Setup "Enable Default Project Status to Planning" has been added to the General fast tab. If enabled, the default "Status" on the project card when created new, will be set to "Planning" instead of "Open".

To update the status from "Planning" to "Open", you can define mandatory fields that should be filled in on the project card to update the status.

To define the mandatory fields for the project card, go to Project Setup → Actions → Mandatory Fields Setup → Project Card.



The mandatory fields list can also be accessed from Global Search. On this, define the Table ID, Field ID, and enable the “Include” to mark it as mandatory.

Table ID 1	Field ID 1	Table Name	Field Name	Include
167	13	Project	Starting Date	<input checked="" type="checkbox"/>
167	14	Project	Ending Date	<input checked="" type="checkbox"/>
167	21	Project	Global Dimension 1 Code	<input type="checkbox"/>
167	22	Project	Global Dimension 2 Code	<input type="checkbox"/>
167	61	Project	City	<input checked="" type="checkbox"/>
167	63	Project	State	<input checked="" type="checkbox"/>
167	64	Project	ZIP Code	<input checked="" type="checkbox"/>
167	14021116	Project	Project Class	<input type="checkbox"/>
167	14021117	Project	Time And Material	<input type="checkbox"/>
167	14021119	Project	Salesperson Code	<input type="checkbox"/>
167	14021122	Project	Manager Project Status	<input type="checkbox"/>
167	14021163	Project	Contract Date	<input type="checkbox"/>

The Mandatory Fields List can only be accessed if you have permission in User Setup to “Access to Define Mandatory Fields”.

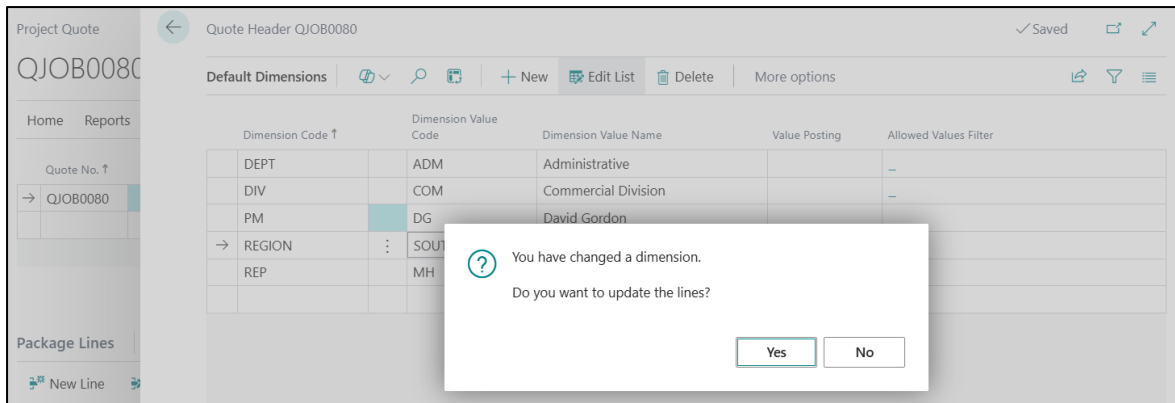
User ID 1	Phone No.	PMP Template Worksheet Name	PMP Batch Name	Acc. to Re...	Mo... Proj... Ma...	Allow Acc... to Rep...	Allow cha... of App...	Allow Pay When Paid	Allow Draw No. Cha...	Allow Sub... of Proj...	Allow Ad... rights for	Allow Neg... Est. Cost	Allow to cha... Cost	Allow Act... to Em...	Disa... JMP on Par...	Allow user to close and open draws	Allow Re... Proj... CF	Mo... Pay When Paid	Access to define Mandatory Fields
DYNAMICS\ED.WILLIAMS				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DYNAMICS\HEENA				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS\JETINDER.SAINI				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS\LINDSAY.MARIANI				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS\ONBOARDING				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS\PARTEEK.PHUL				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DYNAMICS\RAHULKUMAR				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**ADO-1325**

**Enhancement – Quote Dimensions to Quote Tasks**

Any changes/alterations to the dimensions on the Quote card will now be reflected in the Quote Task Lines, like what we have on Projects (BC standard).

This results in a pop-up confirmation message (Y/N) to update the dimension change to task lines.



## ADO-1332

### Enhancement – Progress Payment No. Series

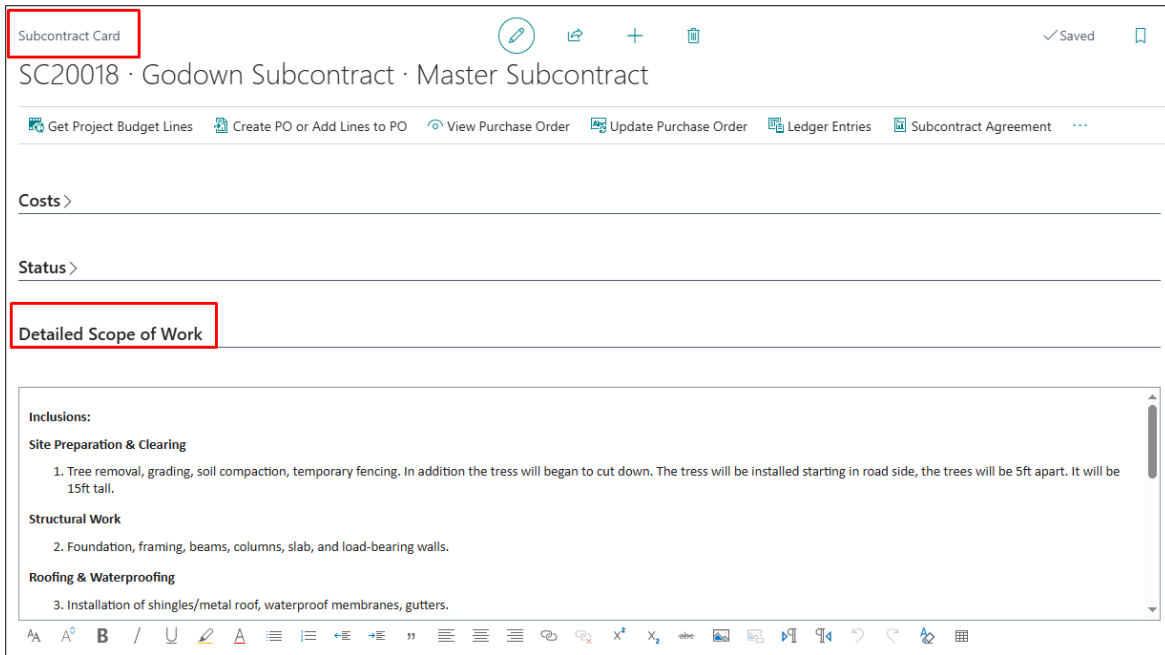
Earlier, a validation inherited from the base ProjectPro system restricted the creation of progress payments. Progress payments could only be created if manual numbering was enabled on the Subcontract Number Series.

The validation has now been removed. You can create progress payments regardless of manual numbering being enabled or disabled on the subcontract number series.

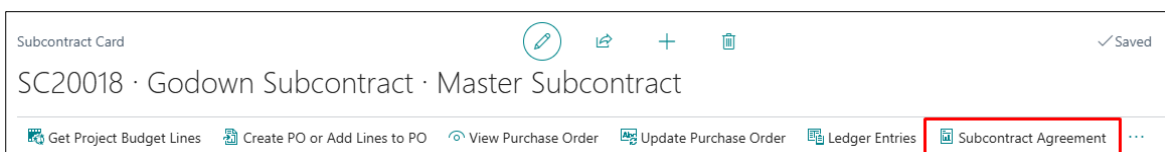
## ADO-1373

### New Feature – Add "Scope of Work" on Subcontracts and on the Subcontract Agreement Report

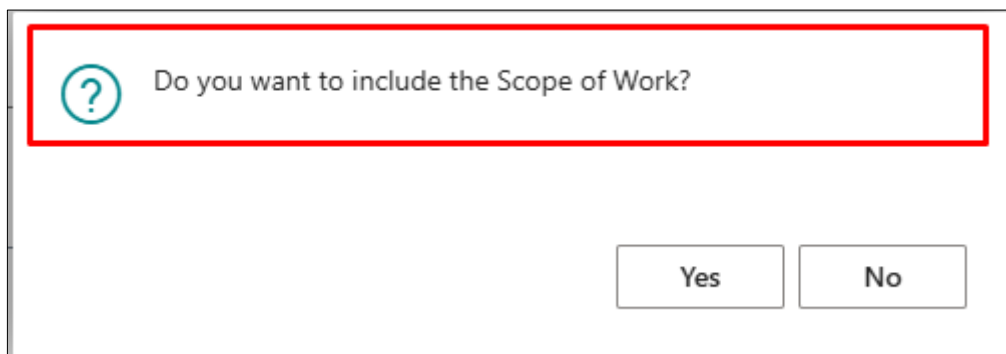
A new section, "Detailed Scope of Work", has been added to the Subcontract Card. This section allows you to enter and format free rich-text paragraph content, enabling clear and detailed documentation of the subcontract scope of work directly on the subcontract record.



The “Subcontract Agreement” report has been enhanced to support printing of the Detailed Scope of Work.



During report generation, the system now displays a confirmation pop-up prompting the user to choose whether the scope of work should be included in the printed agreement.



If selected Yes, the Detailed Scope of Work entered on the subcontract card is printed as part of the subcontract agreement. This provides flexibility while ensuring that scope details are included in the report only when required.



## **SUBCONTRACTOR AGREEMENT**

- I. **The Parties.** This Subcontractor Agreement ("Agreement") SC20018 made on , is between:
- Contractor: ProjectPro UAT26 - NA with a mailing address of 1250 Pittsford Victor Road, Ste 310, Pittsford, NY 14534 ("Contractor"), and
- Subcontractor: United Rental with a mailing address of ("Subcontractor"), both of whom agree as follows:
- II. **The Client.** The Subcontractor acknowledges that any work performed under this Agreement must be in accordance with the latest version agreement(s) ("Prime Contract") made between the Contractor the Client known as:
- Client: Porter's Excavation with a mailing address of 125 Orchard Lane, Waverly, PA, 18856 ("Client").
- III. **Services Provided.** Subcontractor agrees to complete the following: Godown Subcontract ("Services").

### **Detailed Scope of Work**

Inclusions:

#### Site Preparation & Clearing

Tree removal, grading, soil compaction, temporary fencing. In addition the tress will began to cut down. The tress will be installed starting in road side, the trees will be 5ft apart. It will be 15ft tall.

#### Structural Work

Foundation, framing, beams, columns, slab, and load-bearing walls.

#### Roofing & Waterproofing

Installation of shingles/metal roof, waterproof membranes, gutters.

#### Exterior Finishes

Cladding, stucco, brickwork, exterior painting.

#### Interior Finishes

Drywall, flooring (tiles/wood), ceilings, painting, and cabinetry.

## **ADO-1584**

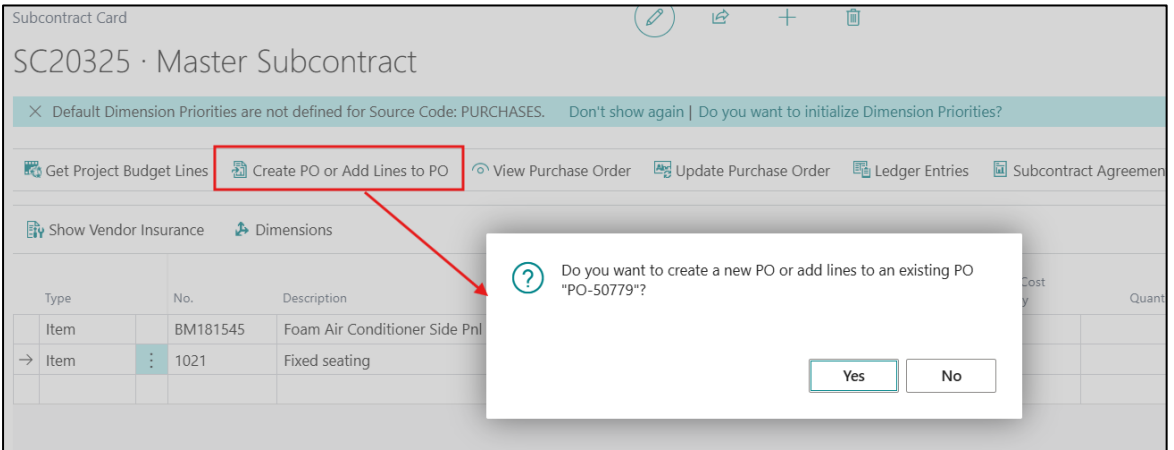
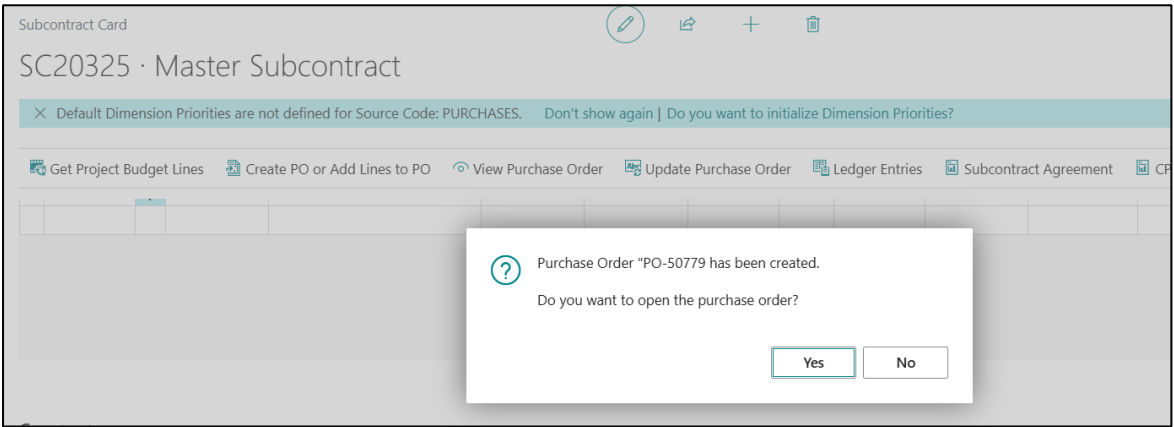
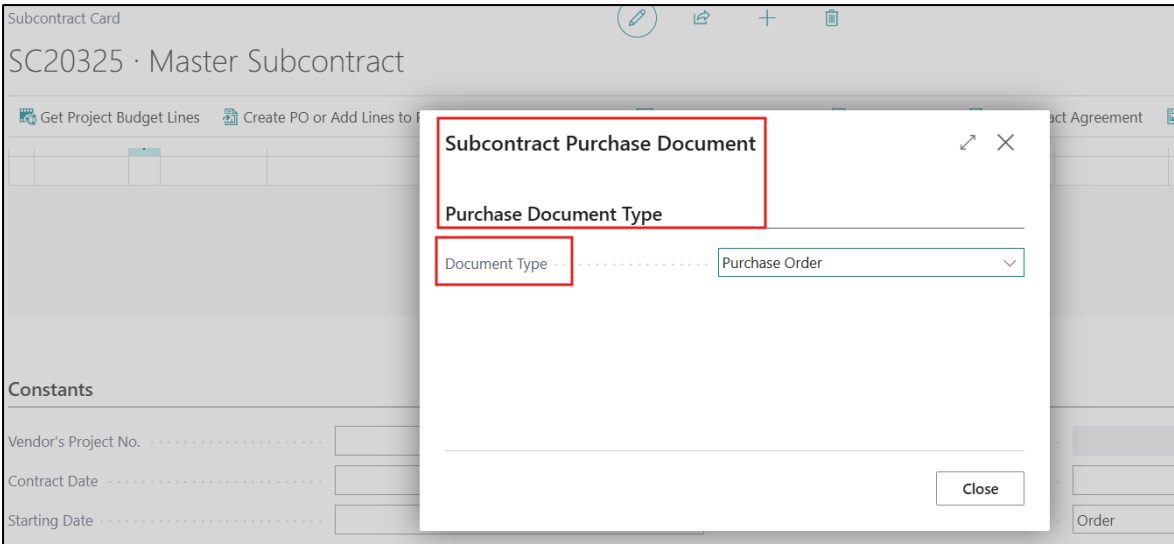
### **Enhancement – Increase Length of “Created By” Field in Cash Flow Worksheet**

In the Cash Flow Worksheet, the “Created By” (username) field had a character length limitation, which caused the Cash Flow Worksheet to run. The length of the field has now increased.

## **ADO-1530**

### **Enhancement – Subcontract Process Flow Messages Enhancements**

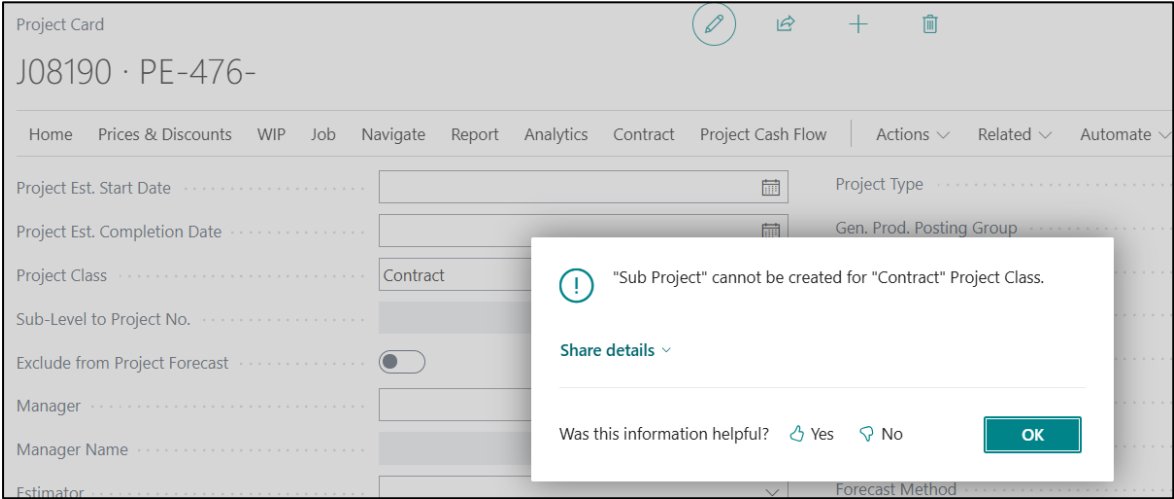
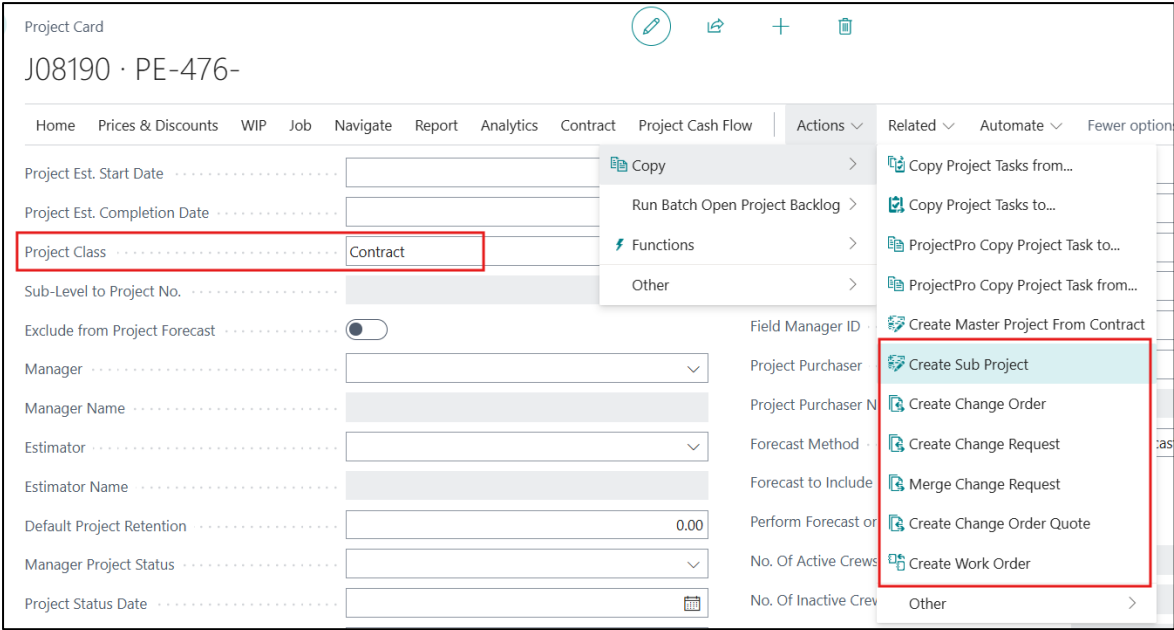
Various messages and captions in the Subcontract process have been enhanced.



**ADO-1615**

**Enhancement – Creation of Sub-Level Projects (Non-Master) from Contract Project**

Different error messages have been added to the Contract project when you try to create a sub-level project apart from the Master project, see the sample below. This ensures that only the Master project can be created from the Contract project.



Additionally, the system also restricts you to manually select the Contract project in the "Sub-Level to Project" field if the Project Class is not a Master project.

Project Card

J08190.01.01 · Pe-471 sub-1

Home Prices & Discounts WIP Job Navigate Report Analytics Contract Project Cash

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

Project Est. Start Date

Project Est. Completion Date

Project Class

Sub-Level to Project No.

Exclude from Project Forecast

Manager

Manager Name

The Project Class must be "Master" to add a "Contract" project as a Sub-Level to the Project No.

**ADO-1660**

**New Feature – New Fields for Project Material Planning**

New fields have been added for the Project Material Planning module.

Table ID	Field ID	Field Name	Data Type
14021139	14021499	"NS_JMP_Line No."	Integer
14021224	14021401	"NS_JMP Document No."	Code [20]
14021224	14021434	"NS_JMP Line No."	Integer
14021127	14021434	"NS_JMP Line No."	Integer

**ADO-1249**

**Improvement – Project Quote - Print by Line Report - Doubling Total**

The "Print by Line" report on quotations has been updated to ensure accurate pricing and correct data representation. The report now evaluates only the appropriate line-level values from the Quote card.

Project Quote

QJOB0119


Home Reports Supplemental Tasks Workflow Analytics | Actions Fewer options

Print By Lines Print By Tasks Custom Reports Project Quote Estimation Report

Print By Segments Print By Segment With SOW Project Quote Itemized Project Quote Non-Itemized

The report logic has been updated to:

- Exclude the End Total line from the calculation.
- Consider only the relevant Posting lines from the Quote card.



ProjectPro-UAT 26-IN  
1250 Pittsford Victor Road  
Ste 310  
Pittsford, NY 14534  
Phone: (585)-331-1736

**Salesperson:** Rosa Smith

**Sold to:** Avery Corp.  
Dan Simpson  
5160 South Ave  
3844 Coleman Creek Rd.  
Pittsford, 14534

**Ship to:** Avery Corp. SHIPAV  
584 Spring Street  
278 Timberline Ave  
Annapolis, MD 21401

**Terms:** Net 15 days

**Project:** Backlog ID-1249

**Quote**  
No.: QJOB0119  
Revision: 0  
Date: 01-20-2026  
User: DYNAMICS\HEENA  
Page 1

No.	Description	Unit Price	Amount
AG05STN	Crushed Stone #2	\$85.00	\$8,500.00
DEMO	Demolition Services	\$48.00	\$2,400.00
E-ASP-CON-C	Catepillar CS-563C	\$137.22	\$4,116.60
75000	Misc Expenses	\$750.00	\$750.00
CT001001	2 cu Ft Concrete Mxer	\$25.00	\$1,875.00
<b>TOTAL PRICE:</b>			<b>17,641.60</b>

This document does not reflect any applicable taxes.

- Format of the report has also updated:
  - **Header and Footer** sections have been revised.
  - **Quote Description** has been added to the report for better context.
  - **Blue lines** removed from the lines part.
  - Unnecessary company and customer information has been removed from the **second page onwards**.



ProjectPro-UAT 26-IN  
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## Quote

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### ACCEPTANCE

This proposal, when accepted by the purchaser, and final approval of Seller's Official Officer, will constitute a bona fide contract between us, subject to all terms and conditions on the reverse side.  
 It is expressly agreed that there are no promises, agreements or understandings, oral or written, not specified in this proposal.

Company Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

Print Title \_\_\_\_\_

Customer Initials \_\_\_\_\_ Seller Initials \_\_\_\_\_

ProjectPro-UAT 26-IN - Confidential

Quotation valid for 30 days

## ADO-252

### Improvement – Quote Estimation Report - Task Descriptions from APOS

The “Quote Estimation Report” has been enhanced to improve the task descriptions displayed.

Project Quote

QJOB0063

Home Reports Supplemental Tasks Workflow Analytics | Actions ▾ Fewer options

Print By Lines
 Print By Segments
 Print By Tasks
 Print By Segment With SOW
 Custom Reports
 Project Quote Estimation Report

- The Task Description is now given priority in the report's output.

Project Task Lines

+ New Edit List Delete Home Project Task WIP Reports | Actions ▾ Related ▾ Reports ▾ Fewer options

Project Task No.	Description	Project Task Type	Work Units	Work Unit of Measure	Burden Percent	Task Start Date	Task End Date	For... By Tasks Total	Override Forecasted Completed Cost
<b>000</b>	<b>Procurement and Contracting Requirements</b>	Begin-Total	0.00		0.00			<input type="checkbox"/>	0.00
001	General Requirements	Posting	0.00		0.00			<input type="checkbox"/>	0.00
001-1	General works	Posting	0.00		0.00			<input type="checkbox"/>	0.00
→ 001-1-1	Final Inspections for general requirement	Posting	0.00		0.00			<input type="checkbox"/>	0.00
002	Existing Conditions with Project	Posting	0.00		0.00			<input type="checkbox"/>	0.00
002-10	Dust metarial -ABC	Posting	0.00		0.00			<input type="checkbox"/>	0.00
002-10-20	XYZ	Posting	0.00		0.00			<input type="checkbox"/>	0.00
005		Posting	0.00		0.00			<input type="checkbox"/>	0.00
005-P1	Process test 1	Posting	0.00		0.00			<input type="checkbox"/>	0.00
<b>009</b>	<b>Finishes total</b>	End-Total	0.00		0.00			<input type="checkbox"/>	0.00
CONTRACT	Contract	Posting	0.00		0.00			<input type="checkbox"/>	0.00
<b>TOTAL</b>	<b>Total</b>	Total	0.00		0.00			<input type="checkbox"/>	0.00

- This applies across all hierarchy levels, regardless of whether “Show Process” or “Show Operation” options are enabled or disabled on the report request page.
- If the Task Line Description is blank, the system will automatically fetch the original Description from APOS to print on the report.



ProjectPro UAT26 - NA  
 1250 Pittsford Victor Road  
 Ste 310  
 Pittsford, NY 14534  
 Phone No. - (585)-331-1736

DYNAMICS\HEENA  
 01-21-2026  
 Page 1

**JOB ESTIMATE QJOB0063**

**CUSTOMER** A J Schmidt  
 8339 Schmidts Lane  
 Annapolis  
**SITE** A J Schmidt  
 8339 Schmidts Lane  
 Annapolis

**DATE** 01-19-2026  
**QUOTE NO** QJOB0063  
**REVISION NO** 0  
**SALES PERSON**

ITEM CODE	DESCRIPTION	QTY	UNITS	UNIT COST	TOTAL COST	UNIT PRICE	TOTAL PRICE
<b>GENERAL REQUIREMENTS</b>							
DEMO	Demolition Services	100.00	EA	\$32.50	\$3,250.00	\$48.00	\$4,800.00
<b>001-1 - GENERAL WORKS</b>							
DUMPSTER	Dumpster	200.00	LOADS	\$100.00	\$20,000.00	\$150.00	\$30,000.00
<b>001-1-1 - FINAL INSPECTIONS FOR GENERAL REQUIREMENT</b>							
E-LIFT	Lift For Furniture	50.00	HR	\$60.00	\$3,000.00	\$100.00	\$5,000.00
					<b>SUB-TOTAL FINAL INSPECTIONS FOR GENERAL REQUIREMENT</b>		<b>\$3,000.00</b>
					<b>SUB-TOTAL GENERAL WORKS</b>		<b>\$23,000.00</b>
<b>TOTAL GENERAL REQUIREMENTS</b>							<b>\$59,800.00</b>
<b>EXISTING CONDITIONS WITH PROJECT</b>							
CT001001	2 cu Ft Concrete Mixer	300.00	EA	\$480.00	\$144,000.00	\$548.00	\$163,500.00
<b>002-10 - DUST METARIAL -ABC</b>							
D8-30-100	Drill Shaft 30"	500.00	EA	\$45.00	\$22,500.00	\$55.00	\$27,500.00
<b>002-10-20 - XYZ</b>							
BM225284	Lag Screw Driver-Adaptor	1,000.00	EA	\$19.00	\$19,000.00	\$27.00	\$27,000.00
					<b>SUB-TOTAL XYZ</b>		<b>\$19,000.00</b>
					<b>SUB-TOTAL DUST METARIAL -ABC</b>		<b>\$41,500.00</b>
<b>TOTAL EXISTING CONDITIONS WITH PROJECT</b>							<b>\$218,000.00</b>
<b>METALS</b>							
S0100	Cost of Direct Labor	1.00		\$300.00	\$300.00	\$0.00	\$0.00
<b>005-P1 - PROCESS TEST 1</b>							
S0100	Cost of Direct Labor	1.00		\$200.00	\$200.00	\$0.00	\$0.00
					<b>SUB-TOTAL PROCESS TEST 1</b>		<b>\$200.00</b>
<b>TOTAL METALS</b>							<b>\$500.00</b>
<b>CONTRACT</b>							
40100	Sales -Projects -Commercial	1.00		\$0.00	\$0.00	\$277,800.00	\$277,800.00
<b>TOTAL CONTRACT</b>							<b>\$277,800.00</b>
<b>TOTAL</b>							<b>\$555,600.00</b>

**ADO-1206**

**Improvement – PFW Values must not copy from the Project to its Sub-Level**

The values from the “PFW Forecasted Completed Cost” and “Override Forecasted Completed Cost” fields present on the Project Task Lines now will not get copied to any of the sub-levels.

J00470 - Building Construction ✓ Saved

Project Task Lines + New Edit List Delete Home Project Task WIP Reports Actions Related Reports Automate Fewer options

Project Task No.	Description	Project Task Type	Burden Percent	Work Units	Work Unit of Measure	Forecast By Tasks Total	Override Forecasted Completed Cost	PFW Forecasted Completed Cost	Project Task Status	Project CF Category	Totaling
→ 04-20	Unit Masonry	Posting	0.00	0.00		<input type="checkbox"/>	0.00	220,000.00			
05-15	Wire Rope Assemblies	Posting	0.00	0.00		<input type="checkbox"/>	0.00	17,000.00			
CONTRACTS		Posting	0.00	0.00		<input type="checkbox"/>	0.00	0.00			
<b>TOTAL</b>		Total	0.00	0.00		<input type="checkbox"/>	0.00	0.00			.total

## ADO-1214

### Improvement – Copy Project Function and Sub-Level to Project No.

The “ProjectPro Copy Project” function now will not copy the “Sub-Level to Project No.” field to the destination project. For this, this will notify you to enter the value manually in case of a sub-level project being created that requires a parent project to be tagged.

## ADO-1329

### Improvement – Flow of "Draw No." from Subcontract Commitment PO to Progress Payment

The Subcontractor Progress Payment process has been updated to preserve the “Draw No.” from the Subcontract Commitment. When the progress payment process is executed, the system no longer clears Draw No. automatically.

Subcontract Commitment

PO-50263 · AT&T Phone Service

Home Release Request Approval Print Actions Related Reports Fewer options

Document Date	1/20/2026	Project Location	
Expected Receipt Date		Subcontract No.	SCJOB0040
Posting Date	1/20/2026	Draw No.	J00020-001
Due Date	10/15/2028	Progress Payment Enable	Yes
Vendor Invoice No.	738378	Status	Open

Progress Payment Header

SCJOB0040 · 1 · 0

Home Reports More options

General

No.	SCJOB0040	Round Amounts	<input checked="" type="checkbox"/>
Requisition No.	1	Final	<input type="checkbox"/>
Version No.	0	Owner Contact Type (Obsolete)	Owner
Subcontract No.	SCJOB0040	Owner Contact Code	
Subcontract Name		Arch Eng Contact Type (Obsolete)	Architect/Engineer
Project No.	J00020	Arch Eng Contact Code	
Project Name	Building Construction 110	Status	Open
Subcontract Draw No.	J00020-001	Retention Reduction Invoice	<input checked="" type="checkbox"/>
Vendor No.	10002	Requisition Date	1/20/2026

With this change, Draw No. remains unchanged on the Subcontract Commitment and can be updated manually by the user, if required, before posting the invoice to the vendor.

## ADO-1090

### Hot Fix – Dimensions Conflict on Subcontract

The conflict with project task lines tagged with Shortcut Dimensions and using those tasks on Subcontract lines has been resolved in the following cases:

- Subcontracts created through the Project card/list.
- Subcontracts are created directly from the Subcontracts list.
- Lines added to Subcontract using “Get Project Budget Lines.”
- Lines added manually to the Subcontract.

Additionally, the flow of dimensions from the Subcontract card to the Subcontract Commitment is also in place.

## ADO-1382

### Improvement – PFW – Total Budget Remaining and Forecasted Variance

The total value of the “Total Budget Remaining” and “Total Forecasted Variance” present on the PFW now gets calculated correctly even when the “Forecast to Include Sub-Level” is disabled on the project card.

Project No. T	Project Task No. T	Budgeted Costs	Total Costs Used	Budget Remaining	Budget Percentage Used	Override Forecasted Completed Cost	Previous Forecasted Variance	New Status Date	New Total Units Complete	New Total Percent Complete	Estimated Cost To Complete	Forecasted Completed Cost	Hours To Finish
J00220.01	201	75,000.00	50,000.00	25,000.00	66.67		-5,000.00	1/31/2026		71.43	20,000.00	70,000.00	
J00220.01	202			0.00				1/31/2026					
J00220.01	203			0.00				1/31/2026					
J00220.01	204	25,000.00	10,000.00	15,000.00	40.00			1/31/2026			15,000.00	25,000.00	
J00220.01	205			0.00				1/31/2026					
J00220.01	206			0.00				1/31/2026					

Budgeted Costs .....	100,000.00	Forecasted Completed Cost .....	95,000.00
Total Cost Used .....	60,000.00	Forecasted Variance .....	5,000.00
Budget Remaining .....	40,000.00	Manager Comments .....	
Estimated Cost to Complete .....	35,000.00	Contract Revenue .....	200,000.00

## ADO-1460

### Improvement – Flow of "Project Task Type" and "Totaling" to Project Task Lines from Project Activities

The "Project Task Type" and "Totaling" field values now flow to the Project Task Lines from the Project Activities list.

J00470 - Building Construction ✓ Saved

Project Task Lines + New Edit List Delete Home Project Task WIP Reports Actions Related Reports Automate Fewer options

Project Task No.	Description	Project Task Type	Burden Percent	Work Units	Work Unit of Measure	Forecast By Tasks Total	Override Forecasted Completed Cost	PFW Forecasted Completed Cost	Project Task Status	Project CF Category	Totaling
→ 04-20	Unit Masonry	Posting	0.00	0.00		<input type="checkbox"/>	0.00	220,000.00			
05-15	Wire Rope Assemblies	Posting	0.00	0.00		<input type="checkbox"/>	0.00	17,000.00			
CONTRACTS		Posting	0.00	0.00		<input type="checkbox"/>	0.00	0.00			
<b>TOTAL</b>		<b>Total</b>	0.00	0.00		<input type="checkbox"/>	0.00	0.00			<b>..Total</b>

## ADO-1596

### Improvement – PO with Negative Quantity and Payment Terms Code

While posting a multiple-line Purchase Order (PO) with one of them having a negative (-ve) quantity, the system made an error under the following conditions. These have been resolved now.

- PO contained a Payment Method Code with Bal. Account No.
- The negative quantity line is taken as the last line in the PO.

## ADO-1512

### Improvement – Project Journal – Unable to post 0 Price Lines

The Standard BC allows you to post the Project Journal entry with 0 Cost and Price. Earlier, ProjectPro allowed you to post a project journal entry only with 0 Cost, but not with both Cost and Price as 0. This is now feasible in ProjectPro as well, just like the Standard BC.

## ADO-1658

### Hot Fix – Dimension Conflict on Creating Change Order Quote

If the dimensions were already present on the Customer card and Project card, the system gave an error while creating a “Change Order Quote” from the Project card.

The dimension flow logic has been corrected as follows:

- Priority is given to the Project Card dimensions. If dimensions exist on the Project Card, those dimensions are used while creating the Change Order Quote.

Project J03720 ✓ Saved

Default Dimensions + New Edit List Delete Filter List

Dimension Code ↑	Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→ DEPT	DE	Distribution Equip		–
DIV	RES	Residential Division		–
PM	CF	Carlos Fraley		–
REGION	NORTHEAST	Northeast Region		–
REP	SB	Scott Baker		–

Project Quote ✓ Saved

**QJOB0148**

Home Reports Supplemental Tasks Workflow Analytics | Actions ▾ Fewer options

Invoicing > 10000 Porter's Excavation

**Project**

Project No. ..... QJOB0148 Architect/Engineer No. .... ▾

Project Description ..... - Architect/Engineer Name ..... ▾

Project Type Code ..... ▾ Project Manager No. .... ▾

**Project Class ..... Change Order ▾** Project Manager Name ..... ▾

**Sub-Level to Project No. .... J03720 ▾** Estimator No. .... ▾

Owner No. .... ▾ Estimator Name ..... ▾

Owner Name ..... ▾ Date Submitted to Estimator ..... ▾

General Contractor No. .... ▾ Retainage % ..... 0.00

General Contractor Name ..... ▾

Quote Header QJOB0148 ✓ Saved

Default Dimensions + New Edit List Delete

Dimension Code ↑	Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→ DEPT	DE	Distribution Equip		-
DIV	RES	Residential Division		-
PM	CF	Carlos Fraley		-
REGION	NORTHEAST	Northeast Region		-
REP	SB	Scott Baker		-

- If Project Card dimensions are blank, the system will automatically pick dimensions from the Customer Card (if available).

Project J03730 ✓ Saved

Default Dimensions + New Edit List Delete

Dimension Code ↑	Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→				

Project Quote ✓ Saved

**QJOB0149**

Home Reports Supplemental Tasks Workflow Analytics | Actions ▾ Fewer options

Invoicing > 10000 Porter's Excavation

**Project**

Project No. ..... QJOB0149 Architect/Engineer No. .... ▾

Project Description ..... - Architect/Engineer Name ..... ▾

Project Type Code ..... ▾ Project Manager No. .... ▾

**Project Class ..... Change Order ▾** Project Manager Name ..... ▾

**Sub-Level to Project No. .... J03730 ▾** Estimator No. .... ▾


Owner No. .... ▾ Estimator Name ..... ▾

Quote Header QJOB0149

✓ Saved 

Default Dimensions   + New  Edit List  Delete

	Dimension Code ↑		Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→	DEPT		ADM	Administrative		-
	DIV		COM	Commercial Division		-
	PM		DG	David Gordon		-
	REGION		NORTHWEST	Northwest Region		-
	REP		MH	Mitch Haven		-