

Released Update ProjectPro 25.0.17.25900 (NA)

Application Enhancement & Hot Fixes

Update ID	Type	Title	Functional Area
PE-508	New Feature	New Project Summary List with All Project Levels	ProjectPro Basics
PE-511	New Feature	Project Quote - Include Project Class "Work Order" and "Change Request"	Project Quote
PE-582	Enhancement	Enhance the CPR Report for ProjectPro without a 3rd Party ISV	Advanced Payroll
PE-657	Enhancement	Project Description on Project Task Summary	ProjectPro Basics
PE-661	New Feature	Progress Billings - "Get Project Planning Line" to Include "Include Sales Tax" Feature	Progress Billing
PE-662	New Feature	Export to Excel for Unit Cost Production by Task Report	Reports
PE-663	Enhancement	Source Group for Resource on New Customer Sales Price List	Progress Billing
PE-664	Enhancement	ProjectPro Caption Change from Job to Project	ProjectPro Basics
PE-669	Enhancement	Posted Purchase Invoice - Validation for "Draw No." on the Update Document	Account Payables
PRJCTPR-492	Enhancement	Project Sales Price List Conflict with Skill Class Code of Crew Time Sheet	ProjectPro Basics
PRJCTPR-494	Enhancement	Progress Billing - Refresh "Quantity" Field Refresh After Invoice Creation	Progress Billing
PRJCTPR-495	Enhancement	Report Aged Account Receivable by Project (14021106) - Print to Excel and Captions	Reports
PRJCTPR-500	Enhancement	Obsolete Profile ProjectPro Purchaser Role Center (14021199)	ProjectPro Basics
PRJCTPR-504	Enhancement	Length of Project Description on Progress Payment	Subcontract

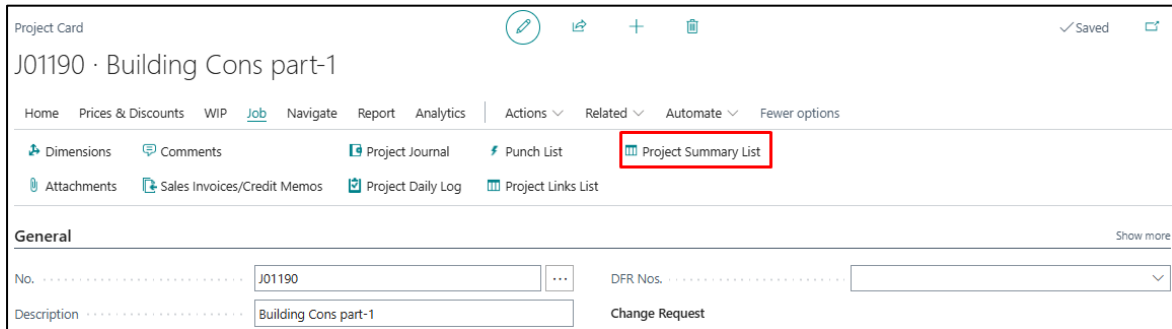
**Note: Details are given below in "Release Note Details".

Release Note Details

PE-508

New Feature – New Project Summary List with All Project Levels

A new “Project Summary List” has been added to the project card, projects list and is available on the Global Search.



This displays a summary of the project, including budgets, billables, actual costs, and invoiced prices, with rolled-up sub-level values to the highest-level project. You can expand and collapse the project levels to view further bifurcations.

The screenshot shows the 'Project Summary List' window for project J00020. It displays a table with the following data:

Project No	Description	Budgeted Cost (\$)	Usage (Cost) (\$)	Budgeted Price (\$)	Invoiced Price (\$)
J00020	Building Construction 110	838,568.50	495,219.75	504,000.00	461,150.00
J00020.001	Building Construction 110	419,573.00	0.00	252,000.00	0.00
J00020.001.001	Building Construction 110	0.00	0.00	0.00	0.00
J00020.001.002	Building Construction 110	0.00	0.00	0.00	0.00
J00020.001.002.001	Building Construction 110	0.00	0.00	0.00	0.00
J00020.002	Building Construction 110	0.00	0.00	0.00	0.00

If opened via Global Search, then it shows all projects, and you can apply a filter accordingly.

PE-511

New Feature – Project Quote - Include Project Class "Work Order" and "Change Request"

On the Project Quote card, options "Work Order" and "Change Request" have been added to the "Project Class" dropdown.

Project Quote

Q2142

Home Reports Supplemental Tasks Workflow Analytics Actions Fewer options

General > Building Construction 110 10001 A J Schmidt Open No

Project Show more

Project No. Q2142 Project Class Change Order

Project Description Building Construction 110 Sub-Level to Project No.

Master Job
SubJob
Change Order
Extra Work
Proposed
Work Order
Change Request

When converting a quote into a project, the system determines the Project Class in the following order of priority:

- **Priority:** The Project Class value selected on the Quote Card.
- **Second Priority:** If Project Class is blank on the Quote Card, the value is taken from the “Default Project Class” on the Projects Setup under the General fast tab.
- **Third Priority:** If the Project Class is blank on both the Quote Card and the Projects Setup, the Project Class remains blank on the project card when converted from the quote.

PE-582

Enhancement – Enhance the CPR Report for ProjectPro without a 3rd Party ISV

The following points have been enhanced in the CPR Report:

- The logo has been added to the CPR report. It isn’t required to add the logo on the Human Resource Setup from now on.
- Calculations have been corrected.
- A new Boolean has been added on the Project Card to ensure whether this is a General Contractor (GC) or a Subcontractor. If the Boolean is enabled, it will be considered as GC; otherwise, it will be a Subcontractor.
 - Based on this, it is also identified in the CPR report.


Project Card ✓ Saved

PRCT001 · Constuction of Hospital

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

Constants/Manager Show more

Completion Date	<input type="text"/>	Location Code	LOC1
Project Calendar Code	<input type="text"/>	Bin Code	<input type="text"/>
Status	Open	Project Posting Date	5/28/2025
Line Type	<input type="text"/>	Time And Material	<input type="checkbox"/>
Last Run Open Project Backlog Value	0.00	Indirect Burden Type	<input type="text"/>
Last Run Open Project Backlog	<input type="text"/>	Requires Certified Payroll	<input checked="" type="checkbox"/>
Open Project Backlog Updated	<input type="checkbox"/>	We Are the GC	<input type="checkbox"/>
Project Posting Group	COM	Unit of Measure	<input type="text"/>

U.S. Department of Labor  WAGE AND HOUR DIVISION

Wage and Hour Division **PAYROLL**

(For Contractor's Optional Use; See Instructions at www.dol.gov/whd/forms/wh347instr.htm)

Persons are not required to respond to the collection of information unless it displays a currently valid OMB control number.

Rev. Dec. 2008

Name of Contractor: <input type="checkbox"/> ProjectPro UAT25 - NA		<input checked="" type="checkbox"/> Or Subcontractor:		Address: 1200 South Ave., Brockport, NY, 14420		OMB No.:14534 Expires:12/31/2028	
Payroll No.: PO001		For Week Ending: 4/6/2025		Project and Location: construction of hospital Grand Prairie, 275 TX, Chicago, IL, 60625		Project/Contract No.: PRCT001/	

(1) Name and individual identifying number (e.g., Last four digits of social security number) of worker	(2) No. of With-Holding Exemptions	(3) Work Classifications	O.T.	(4) DAY & DATE							(5) Total Hours	(6) Rate Of Pay	(7) Gross Amount Earned	(8) DEDUCTIONS					(9) NET WAGES PAID FOR WEEK	
				S	M	T	W	T	F	S				FICA	WITH-HOLDING TAX	STATE TAX	CITY/LOCAL TAX	OTHERS		TOTAL DEDUCTIONS
				4/6	3/31	4/1	4/2	4/3	4/4	4/5										
Daniel Smith XXXX-XX-3333	0	PE Project Engineer		S	M	T	W	T	F	S	5.00	\$45.00	\$225.00							
			OT			2.00			3.00											
			ST		8.00			2.00			10.00	\$30.00	\$300.00	\$15.00	\$20.00	\$20.00		\$15.00	\$70.00	
			OE																	
Henry Robertson XXXX-XX-2222	0	PM Project Manager		S	M	T	W	T	F	S	3.00	\$60.00	\$180.00							
			OT			3.00														
			ST		8.00			4.00	7.00		19.00	\$40.00	\$760.00	\$15.00	\$20.00	\$20.00		\$15.00	\$70.00	
			OE																	

PE-657

Enhancement – Project Description on Project Task Summary

A “Description” has been added to the Project Task Summary page (Project card → Analytics section on ribbon), showing the project description.

Project Task Summary ✓ Saved

Project No. Description

Project No.	Project Task No.	Description	Project Task Type	Totaling	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Invoiced (Total Price)
→ J00760	04	Masonry	Begin-Total		-	-	-	-
J00760	04-20	Unit Masonry	Posting		10,850.00	11,000.00	-	-
J00760	04-25	Unit Masonry Panels	Posting		5,300.00	29,240.00	-	-
J00760	05	Metals	Begin-Total		-	-	-	-
J00760	05-12	Structural Steel Framing	Posting		6,000.00	-	-	-
J00760	05-13	Structural Stainless-Steel Frami...	Posting		8,051.29	-	-	-
J00760	05-25	Aluminum Joist Framing	Posting		-	-	-	-
J00760	CONTRACTS		Posting		-	-	400,000.00	60,000.00
J00760	TOTAL		Total	..total	30,201.29	40,240.00	400,000.00	60,000.00

PE-661

New Feature – Progress Billings - "Get Project Planning Line" to Include "Include Sales Tax" Feature

You can now use the "Include Sales Tax" function with the "Get Project Planning Lines" function as well on the progress billings for Option 2 of "A/R Retention Calc Method" on the Project Setup (under Retention fast tab).

PE-662

New Feature – Export to Excel for Unit Cost Production by Task Report

The "Unit Cost Production by Task" Report has been added with the ability to "Print to Excel".

The screenshot shows a dialog box titled "Unit Cost Production Report by Task". It contains several fields and controls:

- Printer:** A dropdown menu showing "(Handled by the browser)".
- Report Layout:** A text field showing ".\Layouts\NSUnitCostprod.rdl" with a menu icon to its right.
- Custom Filters:** A section header with a horizontal line below it.
- Project No.:** A dropdown menu showing "J06140".
- Project Task No.:** A text field with a menu icon to its right.
- Print to Excel:** A toggle switch that is currently turned on (indicated by a dark circle). This entire row is enclosed in a red rectangular box.
- Filter: Project:** A section header with a horizontal line below it.
- Bill-to Customer No.:** A dropdown menu.
- Status:** A dropdown menu.
- Buttons:** Four buttons at the bottom: "Send to...", "Print", "Preview & Close", and "Cancel".

PE-663

Enhancement – Source Group for Resource on New Customer Sales Price List

All fields related to ProjectPro have been removed from every price list, except for the Project Sales Price List.

PE-664

Enhancement – ProjectPro Caption Change from Job to Project

The remaining captions on the following pages have been updated from “Job” to “Project”.

ID	Name
14021120	NS Job Balance Chart
14021216	NS_Job Links
14021221	NS_Enter Job No.
14021228	NS_SubcontractSetupPage
14021302	NS_Subcontract List
14021342	NS_Job Progress Payment List
14021354	NS_ProjectProManagerActivities
14021399	NS Job Quote Attachments
14021412	NS_JobQuoteUseTaxQuestionnaire
14021420	NS_Job Quote Type List
14021438	NS_Archived Job Quote
14021454	NS_Daily Job Log Card
14021462	NS_Daily Job task Subfrom
14021492	NS_GetSubConChangeOrder

PE-669

Enhancement – Posted Purchase Invoice - Validation for "Draw No." on the Update Document

If you have access to “Allow Draw No. Change” on the user setup, you are allowed to modify the “Draw No.” field on the “Update Document” from a Posted Purchase Invoice.

User Setup		✓ Saved													
		+	Edit List	Delete	Acc... to Re... Pro...	Mo... Proj... Ma... Stat...	Allow Acc... to Rep...	Allow cha... of App...	Allow Pay When Paid	Allow Draw No. Change	Allow Sub... of Proj...	Allow Ad... rights for	Allow Neg... Est. Cost	Allow to cha... Cost	Allow Acc... to Em...
User ID ↑	PMP Batch Name														
→ DYNAMICS\HEENA	DEFAULT				☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☐
DYNAMICS\JETINDER.SAINI					☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
DYNAMICS\MUKESH.KUMAR					☐	☐	☐	☐	☐	☑	☐	☐	☐	☐	☐

Posted Purch. Invoice - Update

PPI-10239 · LeClair Distributors

↗ ✕

General

No. PPI-10239 Posting Date 5/3/2025

Vendor LeClair Distributors

Invoice Details

Payment Reference Posting Description Order PO-50226

Payment Method Code ... ACCOUNT Draw No. J03080-001

Creditor No.

Shipping

Ship-to Address Code

OK
Cancel

PRJCTPR-492

Enhancement – Project Sales Price List Conflict with “Skill Class Code” of Crew Time Sheet

If the new “Project Sales Price List” is enabled (through Feature Management), the “Skill Class Code” on the crew time sheet will flow from the “Sales Prices”.

Priority will be given to the Project Sales Price List created for a particular project, followed by the Project Sales Price List created for all projects.

PRJCTPR-494

Enhancement – Progress Billing - Refresh "Quantity" Field Refresh After Invoice Creation

On an Invoice progress billing requisition, now the system will not allow you to modify the “Quantity” field.

Progress Billing Not saved

J03120 · 1 · 0

Home Reports More options

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

General Show more

No.	J03120	Status	Invoiced
Requisition No.	1	Document No.	SI-10374
Version No.	0	Posted Sales Invoice No.	PSI-20345
Project No.	J03120	Requisition Date	5/14/2025
Customer No.	10003	Period To	5/14/2025
Customer Name	Nesbitts Construction		

Progress Billing Subform Manage Line ↶ ↷

➤ New Line ✖ Delete Line ↶ ↷

Item No.	Revenue Category	Revenue Cat. Description	Project Task No.	Segment Code	Description	Billing Method	Contract Quantity	Base Amount	Quantity	Unit of Measure Code	To
1			004		Lift For Furniture	Unit	100.00	20.00	30.00	HR	400.00
2			CONTRACTS		Sales -Projects -Commercial	%	0.00	6,500.00			
1			008		Demolition Services	Unit	10.00	150.00			

● This requisition has had a receivables document generated. There can be no further changes to this version. Make a new version if changes are needed.

PRJCTPR-495

Enhancement – Report Aged Account Receivable by Project (14021106) - Print to Excel and Captions

“Print to Excel” function works in case of “Aged Account Receivable by Project (14021106)” report.

Aged Accounts Receivable By Project 🔖 ↶ ✕

Printer (Handled by the browser) ▾

Report Layout/Layouts/AgedAccReceivableByProjectS... ⋮

Options

Aged as of 5/29/2025 📅

Aged by Trans Date ▾

Length of Aging Periods 30D

Show If Overdue By

Show All for Overdue Customer

Print Amounts in Customer's Cu...

Print Detail

Include Retention

Print to Excel

PRJCTPR-500

Enhancement – Obsolete Profile ProjectPro Purchaser Role Center (14021199)

Changes related to the ProjectPro Purchase Role Center have been rolled back.

PRJCTPR-504

Enhancement – Length of Project Description on Progress Payment

The length of the “Project Name” on the Progress Payment is increased to be equal to the Description field on the Project card provided by BC standard.