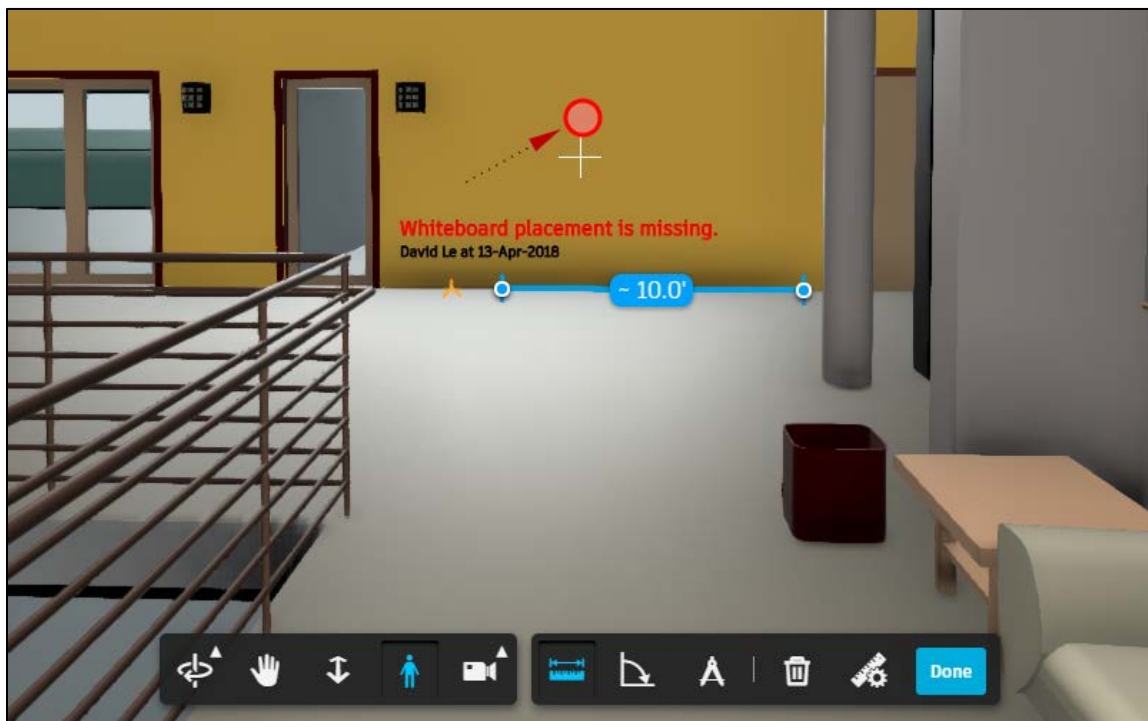


# New Features in Projectmates V17.0

## The Power of BIM and Unprecedented Drawing Collaboration

BIM (Building Information Modeling) technology is transforming the way buildings are designed and constructed. Many owners rely on A/E professionals to develop BIM drawings but often lack the sophisticated software to view 2D and 3D formats. Projectmates v17.0 changes all that.

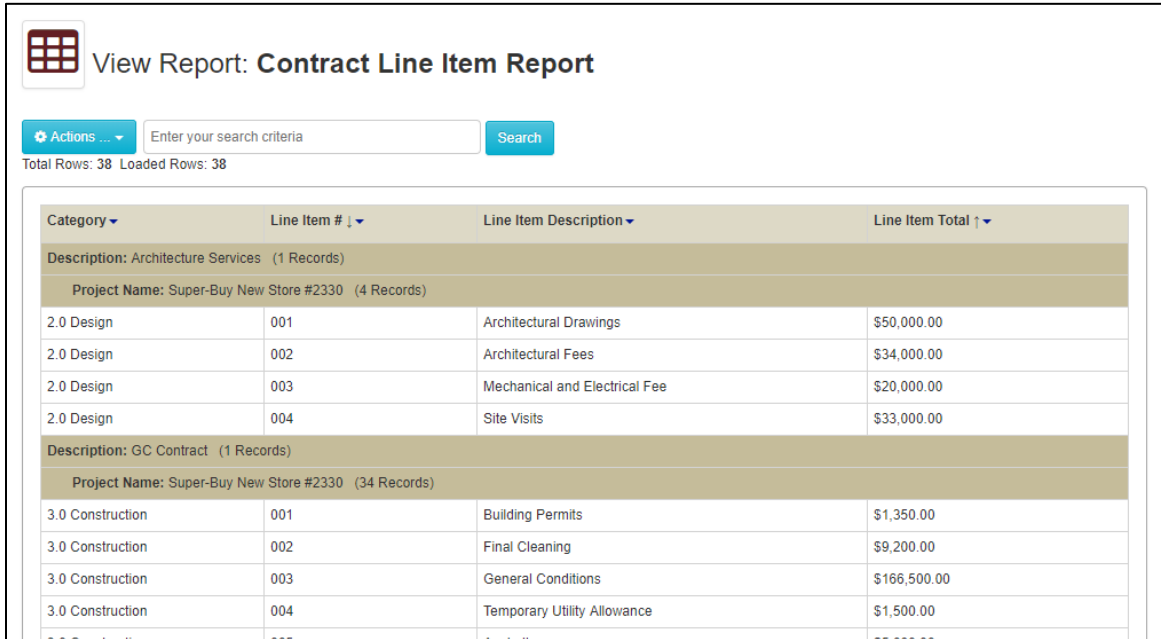
1. **3D BIM Viewer with 2D & 3D Markups** – Projectmates BIM viewer lets you easily view and share designs for most 2D and 3D formats, including RVT, DWG, and DGN. The view supports over two dozen vector file formats! Additionally, the BIM viewer gives you the ability to manage quantity takeoffs & measurements. This new technology is supported on all modern browsers (Chrome, Firefox, Edge, and Safari) and iOS devices.
2. **PDF Viewer with Collaborative PDF Markups** – View and carry out instant markups on PDF files right within Projectmates to provide team members with feedback. This new technology is supported on all modern browsers (Chrome, Firefox, Edge, and Safari) and iOS devices.



For additional information and any inquiries on the cost associated with these features, please reach out to [info@systemates.com](mailto:info@systemates.com).

## Improved Reporting

1. **New Site-wide Ad-Hoc Reports** – Financial reporting at the program level has never been so powerful and flexible. Four brand new ad-hoc reports have been added that let you report at the line item level inside contracts, PCOs, change orders, purchase orders, and invoices. On top of that, a budget summary report gives you rollup data at the project level. And the best news? It’s as easy as drag and drop to create these reports.



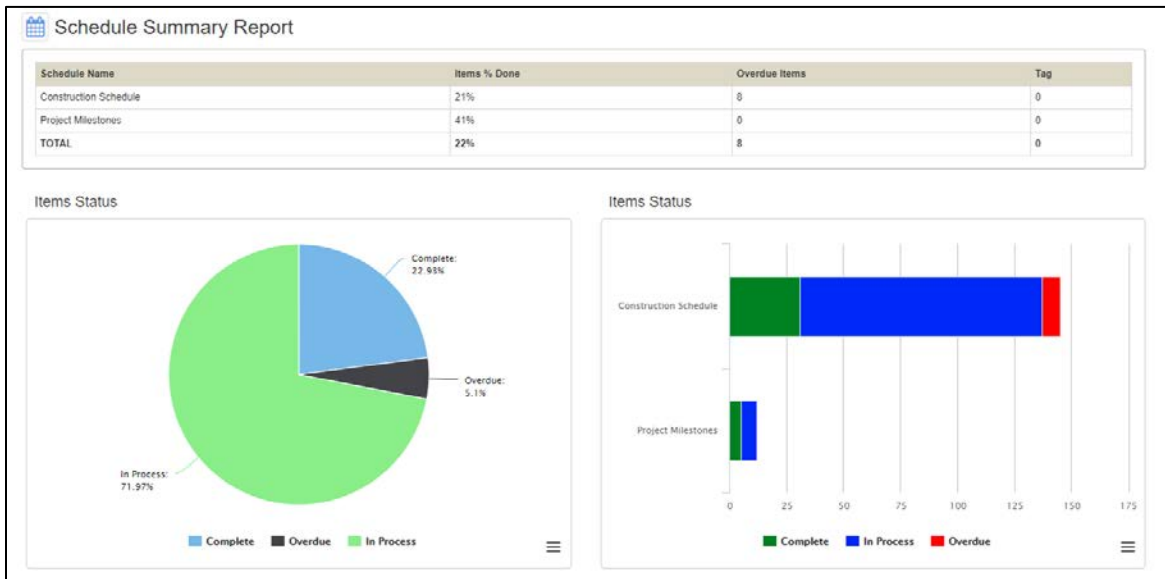
**View Report: Contract Line Item Report**

Actions ... Enter your search criteria Search

Total Rows: 38 Loaded Rows: 38

Category	Line Item #	Line Item Description	Line Item Total
Description: Architecture Services (1 Records)			
Project Name: Super-Buy New Store #2330 (4 Records)			
2.0 Design	001	Architectural Drawings	\$50,000.00
2.0 Design	002	Architectural Fees	\$34,000.00
2.0 Design	003	Mechanical and Electrical Fee	\$20,000.00
2.0 Design	004	Site Visits	\$33,000.00
Description: GC Contract (1 Records)			
Project Name: Super-Buy New Store #2330 (34 Records)			
3.0 Construction	001	Building Permits	\$1,350.00
3.0 Construction	002	Final Cleaning	\$9,200.00
3.0 Construction	003	General Conditions	\$166,500.00
3.0 Construction	004	Temporary Utility Allowance	\$1,500.00

2. **Next Generation Project-based Mini Reports** – Dashboard charts and graphs provide Key Performance Indicators when it comes to looking at schedules, budgets, contracts, RFI, and other statuses within a given project. The Projectmates team has completely overhauled the mini-reports that display inside a project to be faster, sleeker, and easier to read. These mini reports provide more transparency into your project’s performance.



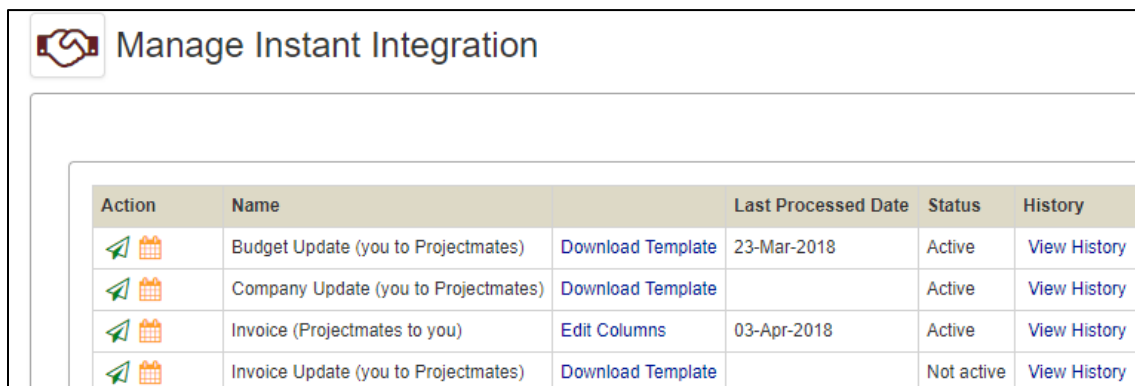
### 3. Other Noteworthy Changes

- a. Pre-Built Reports have a simplified schedule delivery tool that mimics that used in the Ad-Hoc Reports.
- b. When a user is inactivated, Site Admins can now delete any ad-hoc reports or folders created by that user.
- c. Budget Line Item Detail report now has Start and End Date fields.

## Instant Integration

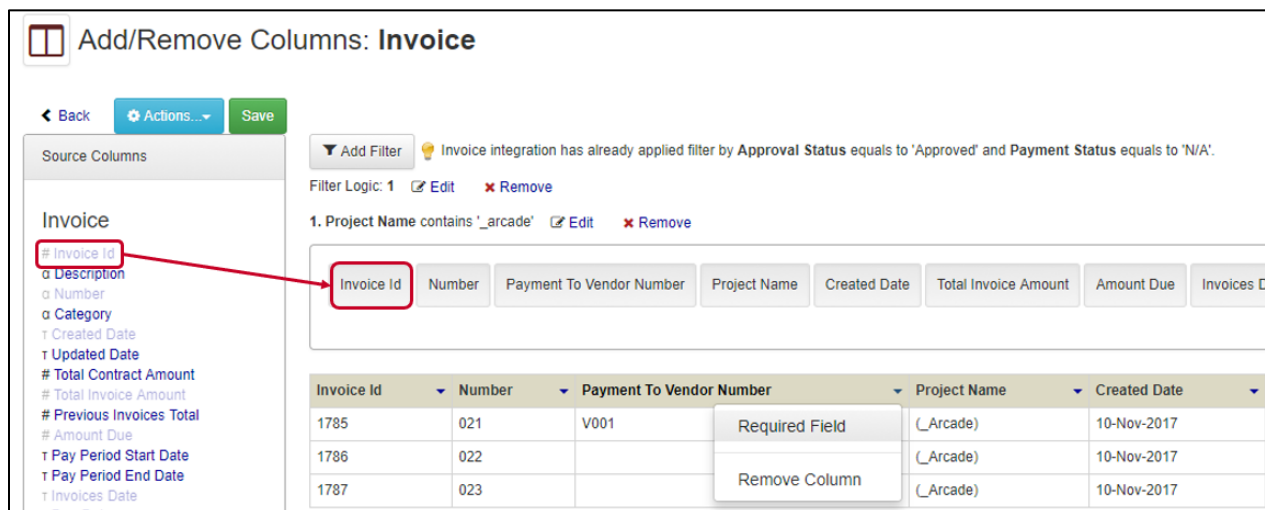
Projectmates Instant Integration allows your company to bridge the gap between Projectmates and your internal ERP systems in record-breaking time and for a fraction of the cost of custom integrations. Integration automates manual processes, saves money through efficiency, and brings organizational excellence by cutting down on data entry errors. From a technical perspective, an **integration is defined as an automated data exchange between Projectmates and one of your internal systems processing on a predetermined interval**. An integration can be a one- or two-way data exchange. The internal system could be your AP system, CRM, or other data repositories you utilize in your organization. In Projectmates v16.0, we introduced Instant Integration for the Invoice module and Company Profiles with a commitment to add more integration types in the future. Projectmates v17.0 delivers on that commitment with these improvements to Instant Integration.

1. **Budget Instant Integration** – This is a brand-new integration point allowing you to integrate labor costs, journal entries, and other project costs that may not be tracked directly in Projectmates. Budget data across multiple projects can be integrated from you to Projectmates through manual upload, sFTP, or file sharing services Box and Dropbox.



Action	Name		Last Processed Date	Status	History
	Budget Update (you to Projectmates)	<a href="#">Download Template</a>	23-Mar-2018	Active	<a href="#">View History</a>
	Company Update (you to Projectmates)	<a href="#">Download Template</a>		Active	<a href="#">View History</a>
	Invoice (Projectmates to you)	<a href="#">Edit Columns</a>	03-Apr-2018	Active	<a href="#">View History</a>
	Invoice Update (you to Projectmates)	<a href="#">Download Template</a>		Not active	<a href="#">View History</a>

2. **Invoice Integration Enhancement** – Over 80% of Projectmates integrations are done to automate invoice payments. Extract invoice data out of Projectmates to upload into your AP system. Version 17 gives you more control when field mapping the extraction file for import into your AP software by allowing you to set default values for field data. For example, if “Business Unit” value should always be “PMatesRocks,” you can hardcode that value for a “blank field’ or set it as a default value for any of the other invoice fields.



**Add/Remove Columns: Invoice**

Source Columns

- Invoice
  - # Invoice Id
  - o Description
  - o Number
  - o Category
  - ↑ Created Date
  - ↑ Updated Date
  - # Total Contract Amount
  - # Total Invoice Amount
  - # Previous Invoices Total
  - # Amount Due
  - ↑ Pay Period Start Date
  - ↑ Pay Period End Date
  - ↑ Invoices Date

Filter Logic: 1 [Edit](#) [Remove](#)

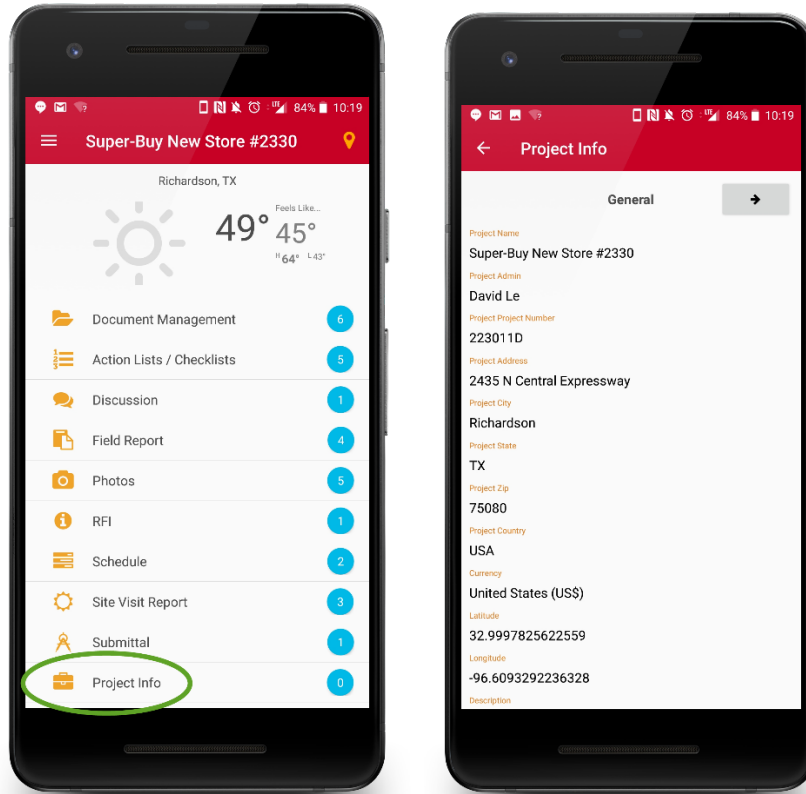
1. Project Name contains '\_arcade' [Edit](#) [Remove](#)

Invoice Id	Number	Payment To Vendor Number	Project Name	Created Date	Total Invoice Amount	Amount Due	Invoices D
1785	021	V001	(Arcade)	10-Nov-2017			
1786	022		(Arcade)	10-Nov-2017			
1787	023		(Arcade)	10-Nov-2017			

For additional information and any inquiries on the cost associated with setting up Instant Integration, please reach out to [info@systemates.com](mailto:info@systemates.com).

## Other Enhancements and Improvements

1. **Mobile App Enhancement** – Want to know the square footage or who the RE Manager is for a project while on the go? Now you can. The Project Info module is now available on Projectmates mobile.



2. **Site Admin > Project Import/Export Template Enhancement** – Projectmates gives enterprise clients the ability to customize over 80 project information fields that are useful for reporting and capturing vital data. With v17.0, when the project info template is exported to Excel, the custom field names show up in the header instead of the default field names (Custom Field 01, Custom Field 02, etc.). What a timesaver for Site Admins who need to mass update information across multiple projects!
3. **Budget**
  - a. In Projectmates terms, a “non-linked invoice” is an invoice not connected to a contract or PO. In the past, when these invoices were linked the budget, line item dollar amounts only updated the budget invoices column. Now, dollar amounts display in both the commitments & invoices columns for better job cost forecasting.
  - b. The budget import process has been optimized to reduce timeout issues, particularly for budgets with approvals and many linked line items.
4. **Document Uploads** – A user-friendly message has been added with all file uploads across all modules to help users know when the upload process is still in progress and when it’s safe to move onto the next task in Projectmates.
5. **Capital Planning Modifications** – Linking capital projects to project commitments and actuals helps fund managers administer funding dollars across multiple phases and fiscal years. Within the project financial modules, a new drop-down for funding year has been added next to the phase to bring even more flexibility and oversight into these “buckets” of money.