


New Features in Projectmates V18.5

Asset Planning

The Asset Planning module is a powerful new tool to plan and standardize FF&E needs across projects. The module can be used to plan and track asset installations and capture their critical information in a convenient interface.

- Plan asset installations across your entire construction program.
- Easily import and assign FF&E lists to a project ahead of time.
- Budget equipment cost and record actual cost.
- Capture critical information such as serial number, supplier, installer, warranty end date, install date and more.
- Use the Projectmates mobile app to upload and attach photos of assets.
- Integrate these functionalities to your ERP or Facility Maintenance software via Ad-Hoc Reports and API.

 **Asset Planning**

Group/Category	Class	Name	Model	Manufacturer
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

✖ Delete
 ☆ Add New Asset
 📄 Export List
 📄 Export Costs
 📄 Import
 🔧 Manage Equipment Classes

Id	Group	Class	Name	Model	Manufacturer
19	Kitchen Equipment	3500	Ovens	480 Series Cookmaster Oven	KBD Kitchen Equipment
20	Kitchen Equipment	3000	Refrigerators	3100 Coolman 25 cu. ft. Capacity Refrigerator	KBD Kitchen Equipment
21	Kitchen Equipment	3000	Sinks	Soaking Select 1-Compartment Stainless Steel	KBD Kitchen Equipment
22	Kitchen Equipment	3000	Deep Fryers	Frypower 35-40 lb. Gas Floor Fryer 90,000 BTU	KBD Kitchen Equipment

Add/Edit Equipment : Ovens

Main Additional Custom **Cost Items**

+ Add New

Description	Cost	Cost Tax	Freight	Freight Tax	Install Cost	Install Cost Tax	
Ovens (3 count)	3,059.72	100.00	0.00	0.00	0.00	0.00	✖
Estimated Shipping Cost (3 count)	0.00	0.00	504.20	50.00	0.00	0.00	✖
Maintenance Team Hours - installation of ovens (3 count)	0.00	0.00	0.00	0.00	220.00	22.00	✖

Add/Edit Equipment : Ovens

Main **Additional** Custom Cost Items

Manufacturer

Manufacturer Contact

Supplier

Supplier Contact

Installer

Installer Contact

For additional information and any inquiries on the cost associated with activating the Asset Planning module, please reach out to info@systemates.com.

Ad-Hoc Reporting

Enhancements have been made to Ad-Hoc reporting as well as report delivery for increased ease-of-use and additional reporting options.

- Item ID has been added as a reportable column across all ad-hoc reports.
- Project longitude and latitude have been added as reportable column across all ad-hoc reports.
- Ad-Hoc Reports now have sticky navigation—column headers will remain visible no matter how far down the report has been scrolled to.

Project Name	Project Longitude	Project Latitude	View Item	Id	Total Budget (H)	Anticipated Cost (M)
1002 - Ames IA - 2322 Red Bird Way	-93.6479673657227	42.027904510498	Electrical	31761	\$219,819.00	\$109,044.20
1007 - Dallas TX	-96.7998657226563	32.7879447937012	Electrical	31880	\$224,006.64	\$193,460.28
1004 - Allen TX - 820 Stacy Rd	-97.7419586181641	30.2829475402832	Electrical	32281	\$218,868.00	\$180,804.00
Line Item Description (C): Equipment (4 Records)						Sum: \$1,224,132.00
1001 - Avondale AZ - 21600 Central Ave	-112.349670410156	33.4353408813477	Equipment	31744	\$346,632.00	\$299,364.00
1002 - Ames IA - 2322 Red Bird Way	-93.6479873657227	42.027904510498	Equipment	31777	\$360,360.00	\$311,220.00
1007 - Dallas TX	-96.7998657226563	32.7879447937012	Equipment	31876	\$367,224.00	\$317,148.00
1004 - Allen TX - 820 Stacy Rd	-97.7419586181641	30.2829475402832	Equipment	32277	\$358,800.00	\$296,400.00
Line Item Description (C): Existing Conditions (4 Records)						Sum: \$284,079.20
1001 - Avondale AZ - 21600 Central Ave	-112.349670410156	33.4353408813477	Existing Conditions	31735	\$67,593.24	\$78,375.98
1002 - Ames IA - 2322 Red Bird Way	-93.6479873657227	42.027904510498	Existing Conditions	31768	\$70,270.20	\$61,061.36
1007 - Dallas TX	-96.7998657226563	32.7879447937012	Existing Conditions	31867	\$71,608.68	\$66,843.86
1004 - Allen TX - 820 Stacy Rd	-97.7419586181641	30.2829475402832	Existing Conditions	32268	\$69,966.00	\$77,798.00
Line Item Description (C): Finishes (4 Records)						

Excel Exports in .XLSX

Exports that are in XLS format can now alternatively be set to download in XLSX format. To activate this feature, please contact support@systemates.com.

Remove Users from Project (Site Admins)

If a user is a Project Admin for more than one project and must be deactivated, a Site Admin had to previously manually assign a new Project Admin for each project. A new tool is available to designate a new Project Admin and remove the user from selected projects at once. To access this tool from the **Site Admin** area, access **Users and Contacts > Active Users**, and select the number of projects the user belongs to.

Manage Active Users

View Inactive Users Add New User Import Users Search Users

Store	Bid	Reports	Mobile	Stores	Login	Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9	...	Abrams, Allison

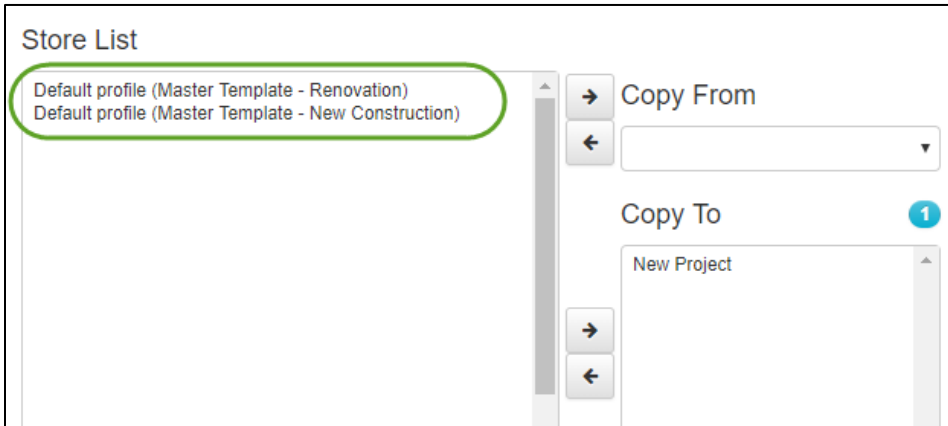
Stores for Abrams, Allison

Remove Select new Project Admin: --Please Select--

Name
<input type="checkbox"/> 1000 - Carrollton, TX - 4020 Jahvani Ct
<input checked="" type="checkbox"/> 1015 - North Richland Hills

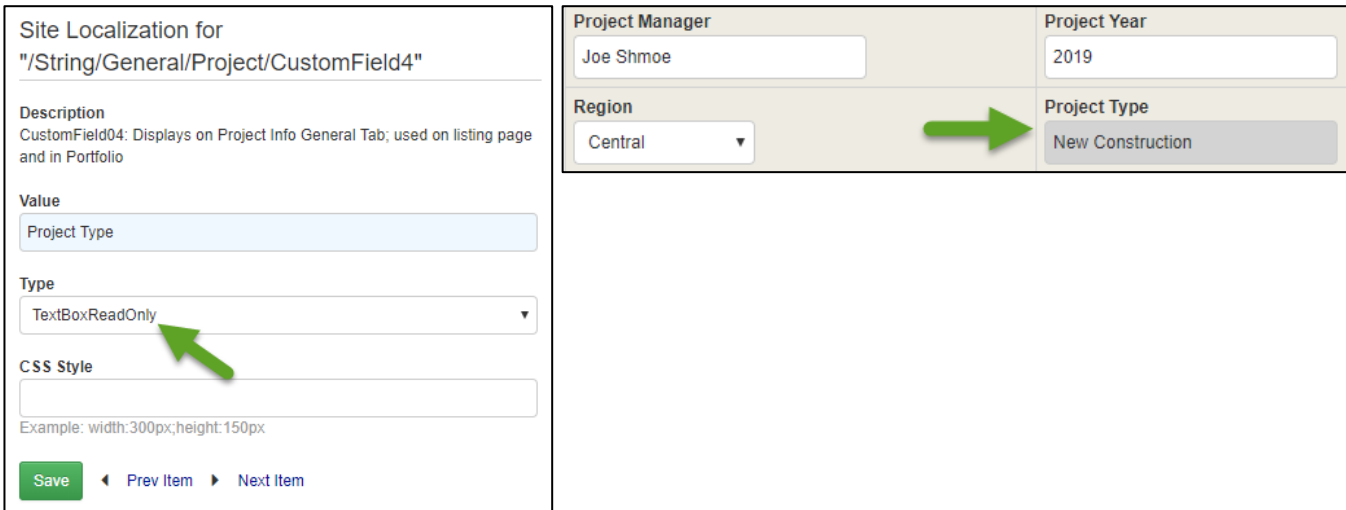
Multiple Default Profiles (Site & Project Admins)

When creating a project, the Copy menu can now provide several Default Profiles to be selected. For information on how to configure multiple Default Profiles for your company, reach out to support@systemates.com.



Project Info – Read Only Fields (Site Admins)

Site admins can now configure Read-Only Text Box fields into Project Info. As the name suggests, these fields cannot be normally edited through the Project Info area of a project, and must be done so through an instant integration or API. For clients that update Project Info as part of an integration or API, this is a great way of ensuring sensitive data cannot be edited accidentally.



Instant Integration Schedule

Instant Integrations can now be configured to run several times within a single day (up to 4).

How often you do you want integration to run?

Frequency	Recurrence
<input checked="" type="radio"/> Daily	<input checked="" type="radio"/> Every Weekday (Mon - Fri)
<input type="radio"/> Weekly	<input type="radio"/> Every Day (Mon - Sun)
<input type="radio"/> Monthly	

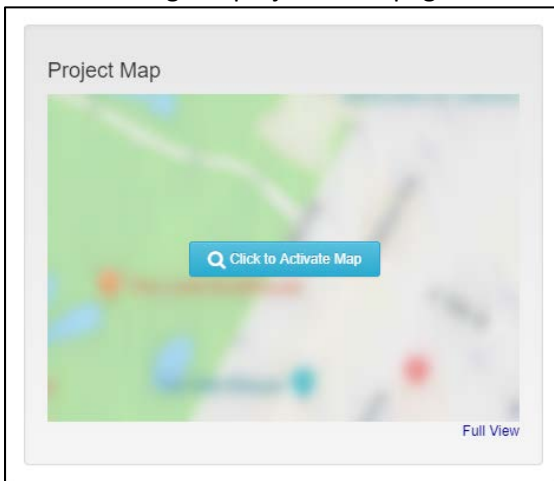
Recurs at

+ Add New

07	:	00	am	✖
12	:	00	am	✖
05	:	00	am	✖

Project Maps

The Project Homepage's Project Map has been updated to activate upon clicking the map. This new feature will save time in loading the project homepage.



New API Methods

New API methods are now supported for the following functions

- Creating a New Project
- Copying Users and Roles to a Project