

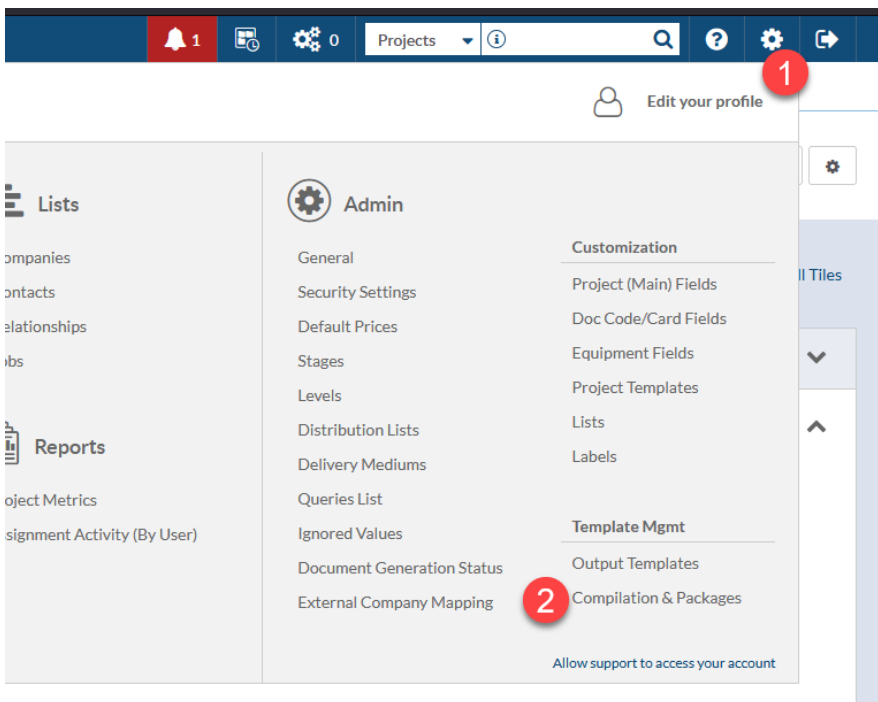
Release - April 2022

07/17/2024 1:47 pm EDT

Compilations

Compilation and Package Presets

Users may preset the default settings for compilations and packages. These are created at the instance, and are selected on the project template. They are loaded onto the project at initiation. So - if you find yourself always updating the compilation settings, you can now make the change once, and start from that point on each new compilation.



For more detail [click here](#).

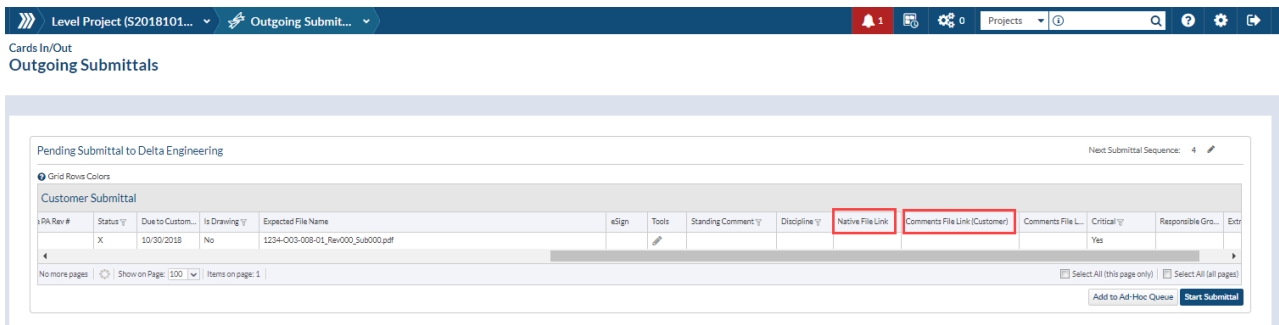
New option to "Only display relevant equipment in lists".

If you have order level cards which you have customized to remove some tags, those tags will no longer appear on compilation cover pages.

Submittals

Outgoing Submittal Grid

Columns have been added to show if any Native or Comment files are assigned to the card (and will be included in the submittal)



Improved Card Search for Assign Files

We've expanded the fields you can use to find the search for the correct card. We now include the sub-supplier, as well as all custom and list fields

HTML editor update

We have refreshed the HTML editor for email templates. Small changes may appear, but generally the same.

Warnings on submittals

Any failure to add headers or footers will stop the system from sending the submittal. Users may forward the submittal after acknowledging the warning.

Reporting

eSignature alerts

Users can subscribe to alerts which will be issued when cards required their eSignatures. On the user profile, expand the Email Notifications area and enable the checkbox.

Initials

 Select colour *

System access ▼

Netsuite credentials ▼

Signature and Initials ▼

eSignature Settings ▼

Defaults ▼

Email Notifications ▲

Alert

Alert me about pending eSignatures.

Receive an email for each action assigned to me.

Receive an email for each internal approval action assigned to me.

List

Receive a list of my open actions

Report

Send me a report showing all changes to status/stage

Send me a report showing all overdue cards

Send me a report showing all submittals which have not been downloaded by the customer (daily)

Grids and Columns

Equipment list: Added column filters.

Relationships: Added column filter for contact name.

Card List and Multi-Project Status: Added column showing the current file name (the most recent file name in the card history - either uploaded or issued).

Project (Main) Change log

A link which will display changes made to the main project fields has been added to the bottom of the project (main) screen.

Affiliates

Updated name

The Subsidiary module has been renamed to the Affiliate module.

Restrict users to specific affiliates.

Enable affiliates on the user profile of each user. Affiliates must be enabled to grant access permissions

Manage project permission per affiliate

Grant a user full permission (example) to Affiliate1 projects, but only allow view access to Affiliate2 projects.

Affiliate addresses (per project)

Affiliates may execute projects from multiple offices. This allows users to select the appropriate address for each project (for each affiliate), and is available to pull into outgoing templates.

Set default affiliate (and default affiliate address) on user profile.

Users can choose which affiliate they want pre-selected on new projects, and can also default the affiliate address to use (for each affiliate)

Control library access by affiliate

Admins will allow each user access to affiliate libraries. This is separate from affiliate access because users may be given access to all affiliate libraries, but may only be permitted to create / view projects for a subset of affiliates.

Affiliates on library cards

By default, all cards uploaded to a library will be assigned to the default affiliate of the user, or if uploaded from a specific project, the project affiliate. Users can add additional affiliates if they wish, but it is not required.

API

New API Calls

Some new calls are available for our API.

- Identify any project where main project data has changed since a certain point in time.
- Identify any cards as "changed" based on changes to attached units.
- Write equipment data to the equipment list

Other items

Project PO number is now available in the outgoing file name variable list

Number of Unprocessed files (incoming) is available as a column on the project list
