

PROJECT PLUS

RELEASE DOCUMENT

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New Features and Enhancements

Release - 27.1.2.2497

Project Setup

Users can configure **general prepayment settings** directly on the **Project Setup** page. These setup values serve as the default configuration for project prepayment invoicing.

Prepayment Configuration on Project

Users can configure **prepayment settings directly on Projects** by selecting a **Prepayment Preference Level**. Based on the selected preference, the system automatically maps default values from setup, with the flexibility to adjust them to project requirements.

Prepayment Preference Level

Users can select a **Prepayment Preference Level** providing flexibility in terms of define how prepayments should be managed for each project. Supported levels include Project, Task and Lump Sum level.

Flexible Prepayment Percentage

Users can tailor prepayment percentage for each Project or Task based on the preference level selected allowing compliance to varying requirements.

Flexible Prepayment Calculations

Users can choose between **two configurable prepayment calculation methods**, allowing prepayment invoicing to be based on either the project's **total Billable Amount** or its **Budgeted Amount**.

Customizable Pre-Payment Descriptions

Users can add predefined or custom descriptions to prepayment invoice and adjustment lines either per Project requirement or as default settings on Project Setup page.

Pre-Payment Insights

Users can access detailed prepayment insights directly from the Project Card, including total prepayment amounts, prepayment percentages, and invoiced amounts.

Project Based Prepayment Invoices

Users can create prepayment invoices at the project level, with amounts calculated based on the total project value and prepayment settings.

Task-Based Pre-Payment Invoices

Users can also create prepayment invoices for individual project tasks, with amounts calculated based on task values and prepayment settings.

Automated Posting

Users can configure prepayment settings on Projects to allow automatic posting of prepayments generated either on project level or Project Task level.

Enhance Project Task Invoicing.

Users now see the Project Task No. auto-filled for selected tasks, making invoice creation faster and smoother.

Prepayment Adjustments in Final Billing

Users also have prepayments automatically deducted when creating final project or task invoices, eliminating manual calculations and ensuring accurate client billing.

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Lumpsum Pre-Payment Invoices

Users can invoice prepayment for fixed (lump sum) amounts at either the project level or project task level based on prepayment settings.

Prepayment Cancellation and Refund

Users can cancel or refund prepayment invoices when projects or tasks change, with all adjustments reflected transparently in prepayment insights.