

Textura Payment Management v23.5 Release Notes

Release date: May 7, 2023

What's New in This Release?

The Textura v23.5 release includes numerous changes to Textura Payment Accelerator, DocWriter, Organization and Project Settings, and more for stakeholders spanning the supply chain (Owners, GC, subs, and sub-tiers).

Below is a summary of the overall changes detailed in these release notes:

- New permission setting for compliance document holds
- Ability to use secondary org name in project emails and in the application
- Updates to Textura Payment Accelerator email notifications
- Updates to the Enterprise Wide Disbursement report to include Textura Payment Accelerator info
- Ability for Users to see subcontractor billing comments at modify billing
- Improvements to the Match Change Orders workflow
- New ability to search by project name and/or number when adding payments in owner funding
- Improvements to the DocWriter homepage
- A new web service for owners to get a list of projects
- Expose project line level tax on the project fees page for GCs and owners
- Several new invoice number formats for use in projects
- Several bugs fixed

To learn more about this release and future releases, we encourage you to attend our monthly Level Up webinar. You can register [here](#).

To see more information about each of the individual changes included in this release, please go to the next page.

Key Enhancements Implemented

Product Area	Feature	Details	Personas Impacted
Organization Settings	New Roles and Permissions Section with New Compliance Document Hold Setting	<p>A new organization setting has been added to organization settings called “Disburser role required to release compliance document holds”.</p> <ul style="list-style-type: none"> When the setting is enabled in an organization’s settings, users within the organization must have the disburser role at the project level in order to release compliance document holds <p>Note, this setting is currently only accessible to Textura employees. Please contact your Textura rep if you would like this setting enabled.</p>	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Project Settings	Update Project Display Name Used in Projects	<p>This new project setting enables a GC or owner to display a secondary organization name to their subcontractors in the application and in application emails.</p> <ul style="list-style-type: none"> Display of the funding organization name is optional and can be configured in project settings The default will continue to be the organization’s primary name when the setting is not used The list of available names in the Project Display Name dropdown is the list of secondary organizations tied to the organization When enabled, subcontractors will: <ul style="list-style-type: none"> See the Project GC Display Name display name within the TPM User interface (e.g. ‘Accept Contract’, ‘Project Participants’). Emails received by subcontractors will show as having been sent From the specified name. 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input checked="" type="checkbox"/> Subcontractor <input checked="" type="checkbox"/> Sub-tier
Textura Payment Accelerator (TPA)	TPA emails sent to GCs and subs reminding both of TPA invoice “age out” dates have been updated	<p>TPA age out notifications have been updated to more clearly call out actions needed for invoices that approaching the TPA cutoff date (a setting configured by GCs in their TPA program). Note that invoices not disbursed or not extended by the subcontractor by the cutoff date will fall back to standard payment terms.</p>	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input checked="" type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier

		<p>The notifications have been updated as follows:</p> <ul style="list-style-type: none"> Subcontractor PA508 notifications: <i>"The Invoice for draw 1 on project TPA project is nearing the TPA program cutoff date of 28-Apr-2023. Payments not initiated by their cutoff date <u>will not be accelerated</u> and will be paid in accordance with the payment terms of your subcontract. This project offers the option to extend your cutoff date so that you can still benefit from an accelerated payment."</i> GC PA509: <i>"Payments not initiated by their cutoff date <u>will not be accelerated</u> and will be paid in accordance with the payment terms of the subcontract."</i> 	
Textura Payment Accelerator	EWD Status Details Report Has Been Updated to Include TPA payments	<p>TPA payments have been added to the EWD Status Details report available to disbursers after disbursing payments in Textura.</p> <ul style="list-style-type: none"> Disbursers will now see both TPA and non-TPA payments in the EWD Status Details report when generating the report. 	<input type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Enter Billing	Organizations Can See Billing Comments from Their Subcontractors on the Modify Billing Page	<p>Users can now leave comments in the comment modal while entering billing.</p> <ul style="list-style-type: none"> Previously, only GCs or Owners could leave comments on the Modify Billing page for their subcontractors to view GCs or owners can view the comments added by their subcontractors in the comment modal in the 'Modify Billing Details Screen' 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input checked="" type="checkbox"/> Subcontractor <input checked="" type="checkbox"/> Sub-tier
Change Orders / Variations	Remove Subcontractor-Requested Change Orders from Owner Billing Documentation	<p>Change orders being requested by subcontractors are also appearing on owner billing documents that are being generated by GCs.</p> <ul style="list-style-type: none"> This change removes subcontractor-requested change orders to GCs from owner billing documents 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Change Orders / Variations	Enhancements to the Change Order Module for Viewing, Matching, Approving, and/or	<p>The Change Orders page has been enhanced as follows:</p> <ul style="list-style-type: none"> Users can view unallocated, imported change orders in a tab called Match Change Orders on the Change Order page 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier

	Deleting Imported Change Orders	<ul style="list-style-type: none"> Multiple change orders can be consolidated and approved on the Match Change Orders tab Change orders can be deleted on the Match Change Orders tab The Match Change Orders tab has been modernized in terms of look and feel 	
Owner Funding	Project Search Has Been Added to Add Payment in Owner Funding	<p>Users can now search projects by project name and project number to assign owner payments to projects.</p> <ul style="list-style-type: none"> When searching for an owner payment, users will see both the project name and number in the project dropdown list to select. 	<input type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
DocWriter	Improvements to the DocWriter Homepage	<p>The following changes have been added to DocWriter to help with navigation and usability:</p> <ul style="list-style-type: none"> A help link is now accessible in the dropdown menu in the top righthand corner of DocWriter Status badges ('Legacy', 'Draft', 'New', 'In Review', etc.) have been added to the document array for each document template The 'Document Name' column has been widened for displaying longer template names 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Integration	New Web Service called 'getProjects' for Owners to Retrieve a Project List from Textura	<p>A new web service has been built for owners to retrieve a list of projects from Textura.</p> <ul style="list-style-type: none"> The new API is called 'getProjects' The new API is only accessible to owners in Textura 	<input checked="" type="checkbox"/> Owner <input type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Project Fees	Project-Level Tax Has Been Added to the Project Fees Page	<p>Line level tax information will now be displayed in the Project Metering Data tab of the Project Fees page.</p> <p>This change allows GC and owner admin users to review their project fees.</p> <ul style="list-style-type: none"> Line level tax is displayed on the Project Fees page in a new column called "Tax This Period" 	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input type="checkbox"/> Subcontractor <input type="checkbox"/> Sub-tier
Project Settings	New Subcontractor Invoice Number Formats	New invoice number formats have been created for GCs and Owners to use in projects.	<input checked="" type="checkbox"/> Owner <input checked="" type="checkbox"/> GC <input checked="" type="checkbox"/> Subcontractor

		<p>The new invoice number formats use the following rules:</p> <ul style="list-style-type: none"> • Contract Number – Sub Pay App Number • T+Subcontract#subPayAppNumber • R[sub pay app#]-draw end date(MM/YY)-project number (last 4 characters with final character omi • Subcontract#(Characters1-6)Subcontract#(Characters9-13)Draw#(2digits) • Subcontract#(Characters1-6)Subcontract#(Characters11-15)Draw#(2digits) • Subcontract#(Characters1-2)Subcontract#(Characters4-6)Subcontract#(Characters9-10)Subcontract#(Characters12-15)Draw#(2digits) 	<input checked="" type="checkbox"/> Sub-tier
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