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What's New in Vantagepoint?

The latest new features and enhancements to power your project success

What is Deltek Vantagepoint?

At Deltek, we focus on delivering features and functionality that helps you take your business to the next level and the latest releases of Vantagepoint are no different. Give your teams the latest tools and resources to power project success with Vantagepoint.









Complete View of Your Business

Gain visibility across your business with a single source of truth from project initiation through completion. Get actionable insights to make more informed decisions.

Project-Centric & People Focused

Proactively manage the complete project lifecycle in one place with greater visibility into costs, schedule and resources to ensure project success.



Manage project costs and company financials with precision and control to boost profitability and cash flow. Automate time-consuming processes to improve accuracy and efficiency

More Efficient Way to Work

Empower users with a solution that is built for the everyday user with automation, workflows and extensibility to improve efficiency and productivity across the business

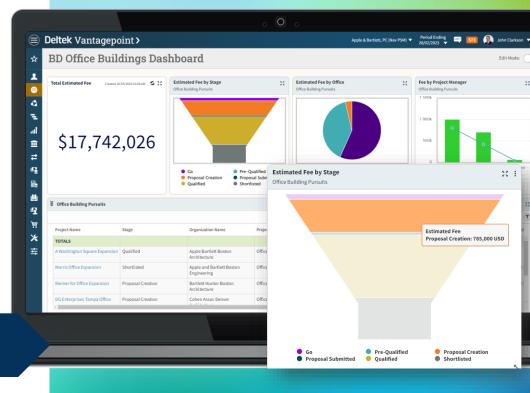
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Dashboards and Business Intelligence

Funnel Charts

- » Provide clear, visual of pipeline by stage
- » Helps BD and marketing leaders see what's working, where more pipeline may be needed
- » Easily see more detail by hovering over a segment of the funnel chart
- » Requested by customers and internal sales teams

Visualize your pipeline by stage to quickly identify challenges and concerns

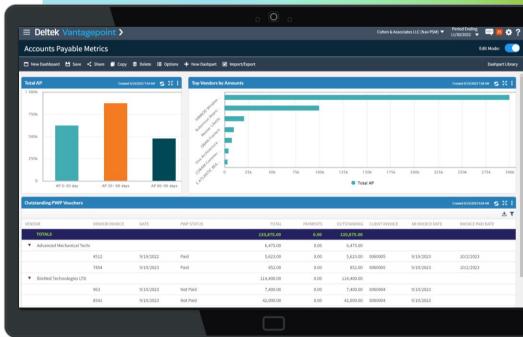


Gain Insight into AP Details

- Deliver greater insight into accounts payable details on dashboards
- Quickly identify cash flow requirements, exception reporting and company purchases in one place
- » Give finance leaders clear visibility into key AP metrics
- >> View details for pay when paid (PWP) and outstanding AP balances by vendor on a single dashboard







Deliver better visibility into AP details and metrics on the dashboard

KPIs on the Dashboard

» Provide leadership with clear visibility into key performance indicators including progress toward targets

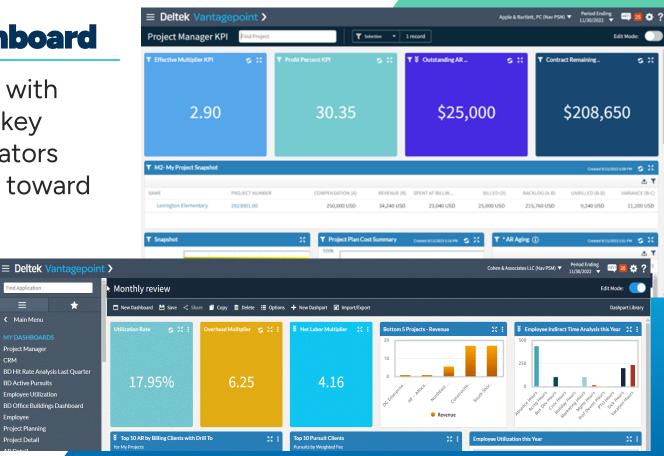
Find Application

K Main Menu

Project Manager CRM

Employee **Project Planning**

Project Detail



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Improved Dashboard Calculations

- » Get the results you need by first filtering to the records and dates you need, then calculating your results on just those filtered amounts
- » New calculated field specific to a particular dashpart

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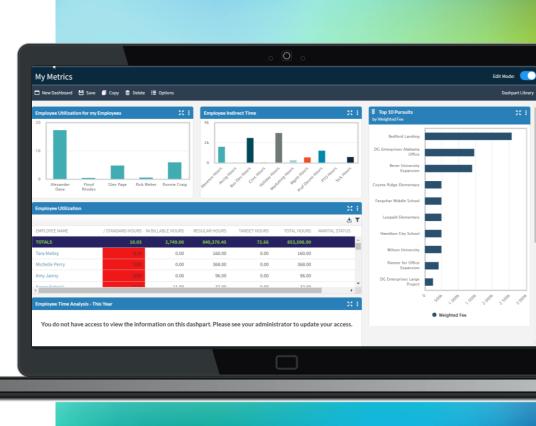
Firm Base Dashparts

- » Firm base now available to build dashparts
- Continuing to extend flexibility of dashboards
- » More details at their fingertips
- » Great option to share with BD leaders who may not have been able to build out what they need on dashboards previously

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Improve Employee Info for Dashboards

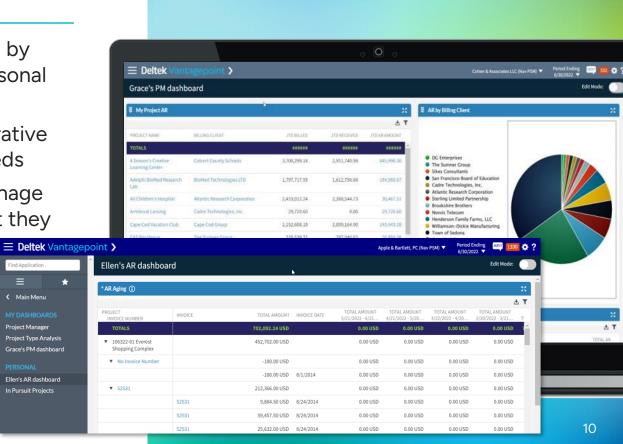
- » Increased visibility with more employee data on dashboards
- » New columns now available for dashboard from employee hub
- » Employee User defined fields available
- » New field level security



Personal Dashboards

- » Expand dashboard adoption by allowing users to create personal dashboards
- » Eliminate need for administrative time spent on individual needs
- Give users the power to manage their own data and see what they need with pre-configured dashparts

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Drill-Down Path from Key Summary Metrics

- » Empower better decisions with ability to drill into detailed data
- » Define drill down path for table and chart dashparts
- » Allow for deeper dive and determine what the user will see

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Update Percent Complete from Dashboard

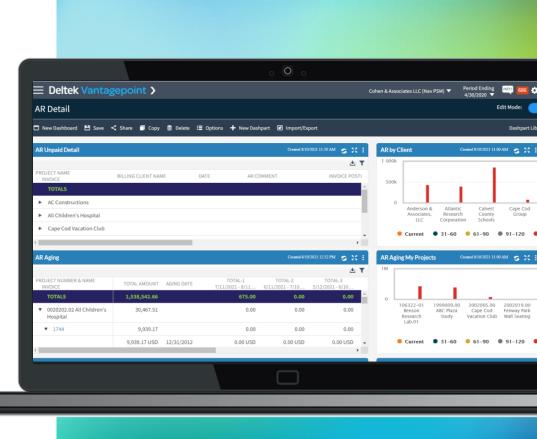
- » Allow PMs to easily manage percent complete
- » View and update directly from dashboard
- » Improve project reporting and billing accuracy
- » Fewer clicks, better visibility = improved adoption

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More Detail at Your Fingertips

- » New AR Detail Base
- » Project Base Changes
- » Percentage data type calculated field
- » Drill to detail for direct and reimbursable consultants and expenses from project base columns



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Vantagepoint 4.5

Improved Project Status Visibility

- NEW project detail base for dashboards to create chart and table dashparts
- » Eliminates need for separate processes and spreadsheets
- Delivers more detail to dashboard including labor, expense and reimbursable detail

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Focus Attention with Dashboard Filters

- » Dashboards typically have filter when created
- » Next level of filtering based on additional search criteria
- » Consistent search throughout system for improved usability
- » Focus on one project or subset to identify bright spots or challenges



Advanced Business Intelligence

- » NEW analysis cubes in Vantagepoint Intelligence
- Gain deeper insight into the business to drive better decisions
- » Delivers insight across the business
- » Real-time scrutiny now with analysis cubes
- » Built on Tableau

Vantagepoint 4.0 E Deltek Vantagepoint > Analytics - Finance 1 🗆 New Dashboard 💾 Save < Share 🗐 Copy 🏦 Delete 🗄 List View 🕂 New Dashpart 🗷 Import/Exp Finance 1 Last 10 Months Profit % by Project Manage Opportunity Stage Weighted Revenue by Org Spent, Billed, Received, AR and Revenue over the last 8 years OH Rate by Org Spent @ Billing Received Revenu

More Detailed Dashboards

- Drill to detail for hours, labor cost and labor billing on project dashparts
- » New options for planning data on dashparts
- Enhanced pipeline dashpart includes total compensation

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Vantagepoint 3.5

Expanded Dashboards

- » NEW! Employee labor and utilization, project billing dashparts
- » Now add Web URL dashparts to add web pages to your dashboard
- Combine chart types into a single chart (ex. bar and line)
- » Share dashparts between databases

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Dashboard Enhancements

- Provide clear visibility into your business with interactive dashboards
- » Build dashboards that put the right information front and center
- » Create charts, graphs, lists and more to display your data
- Call attention to key areas with conditional formatting



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Project Management & Resource Management

Employee Capacity for Reassignment

- Easily understand capacity and upcoming assignments for a resource
- Determine if your potential reassignment can be managed within their current workload
- » Eliminate extra clicks going to another screen to view assignment details for a specific employee

Make Better, More Informed Decisions if You Need to Reassign Resources

Vantagepoint 7.1

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				•	000003300	HF - Key	17	40	43	36	
				•	0000003500	HF - Key	34	80	85	73	
				►	0000002800	HF - Key	17	40	43	36	
u											
C.											

Deltek

Reassign

Project Smart Summaries[™]

- >> Use GenAI to quickly create a project summary to review project details
- Easily understand project status without reviewing pages of reports or sifting through tabs
- Review summary of project financial health, recent activities, plan status and more



Vantagepoint 7.0

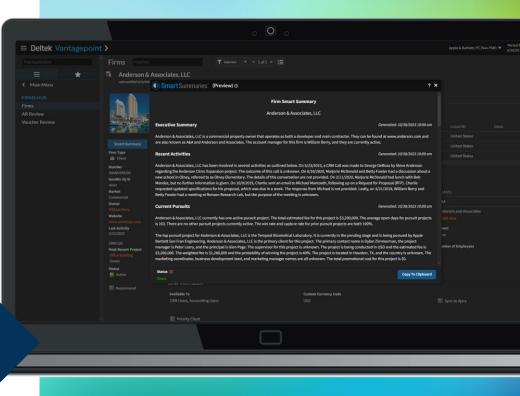


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	Deltek Vanta	gepoint >	Cohen & Associa	etes LLC (Nav PSM) 🔻	Period Ending 08/31/2022	-
*	Projects	nd project	T telection * 4 1 of 1 b IE			(+ Nev
•	180009900	es Orlando Office 2023 04:28 pm by Daven Kessner NG TEAN MILESTONES D	Overview Overview The DG Enterprises Orlando Office Owned and the project, number 180009900, is an active retail project in the awarded stage. The 25-	IDTES/CONTRACT *	Add Touchgoir	CHANGE RES
	(A. A. I	Long Name DG Enterprises Orlando C Linked Project DG Enterprises Orlando -	acre development is organized around a central town green, with offices, retail, and apartments placed around a central clvic space. The project is managed by Adam Horav, with Abby Schoppe as the Principal-ForAnge and Mathwen Brown as the Supervisor. The construction phase is set to start on 09/23/2023. This expansion to the existing village shopping experience is expected to greatly benefit the town and local establishments. Financial Health			
	WON-REPEAT CLENT	 Key Pursuit Employee Smart Symmetry is a Pilot feature the generative in technology. As a result isinitiation may out in how interna represented. Please writy the output accuracy. 	The DG Enterprises Orlando Office project has a compensation of \$53,500. The total billed amount on this project is \$23,500, of which the current accounts receivable balance outstanding is \$15,000. The average age of accounts receivable is 22 days. The primary client for this project, Redfore Associates, has an average payment duration of 22 days. The job to date earned percent complete of this project, 84%.			
四 米 车	Project Number 180009900 Status Active Organization (1) Cohen Assoc Denser	Additional Information Business Development Le	Recent Activities Two notable activities were conducted as part of the DG Enterprises Orlando Office project for the client, Redbrook Associates. The first activity was a meeting to discuss design, conducted via email on September 15, 2023. The attendees from our team were Sarah Ferguson and Kate Toopfield, with Abby Henderson attending from the client's side. A unique aspect of this meeting was that all keynote speakers were women.			
	Architecture Responsibility Architect, Full Service Project Summary Stage Won - Impeat Client	Solicitation # None Government Award Type None	The second activity was a Tech Conference in Boston on October 11, 2023. Our representatives, Sarah Ferguson and Kate Topsfield, attended this conference. However, no attendees were listed from the client's side. Similar to the previous meeting, all knynote speakers at this conference were women. Both these activities were part of the Village Green expansion campaign			
3	Capacity Calculation Included in Scheduled and Utilization Wiin/Loss Details Opportunity Details	Duration None Project Details	Plan Summary The DG Enterprises Orlando Office project is scheduled to commence on January 1, 2023, and conclude on July 1, 2024. The current active work involves Construction Administration. The EAC Profit for this project is 15%, with a Labor EAC Cost Multiplier of 3.50. The EAC Billing Variance stands at 1.01.			
	Project Details Plan Status Putrohed Plan Start - End 01/31/2023 - 07/02/2024	LJC Discpline* Name Additional Details	The top resources for this project include Natasha Elliot, an Architect with an EAC Hours of 165, and David Emery, a Senior Engineer. Further details about David Emery's EAC Hours are not provided in the data.			
	Show: Cont (USD) V Contract \$53,500.00 JTD \$995.00 JTD \$995.00 ETC Planned \$16,742.04	Source Enstant*	Suture Boot Kong]		

Client Smart Summaries™

- » Leverage Generative AI quickly turn client data into valuable intel
- » Get a quick snapshot of client history and status at your fingertips
- Include key info like recent activities, active pursuits, past projects and more
- » Save hours of sifting through volumes of data with one click

Transform Client Information to Client Intelligence with Generative AI



Simplify PTO Updates for Plans

- » Automatically update
 PTO/Absence Plans from
 approved absence requests
- » Make it easier for PMs to manage workload and plan for resource schedule gaps
- Encourage teams to update PTO earlier and leverage absence requests for better project planning

Automatically update resource availability from absence requests for more accurate plans

Vantagepoint 7.0



	Delte	k Vantag	epoint	>												Colt	en & Associates LLC	(Nav PSM) Peric 05/31	d Ending		•?
PI	an fie	f project			T Selection	• « Notin	selector 🕨													+ New I	Project
Ti		Miami 004 > 001 Arch		✓ Plantschools	el aut to ma												0	ech Out Save Basel	ine Publish	Other A	ctions ¥
	Scale: Entire	Project in weeks	2															a n	blished She	wt Cost (U	(SD) ¥
1	CONTRACT	SCHEDULE	LABOR	DPENSES	UNITS														4 06/05/2023	to 12/31/3	2023 •
	D LEVEL/W		Show Less	START	PLAN END	ASSIGNME	ASSIGNM END	ETC HOURS	SUB-ROW	2023 3 10/16 - 10/22			2023 13/06 - 11/12	2023 20 11/13 - 11/19 11/29	23 -11/26	2023 11/27 - 12/03	12/04-12/10 12/			5/31	٥
	▼ PTCI+M			01/01/202:			12/31/2023	360.00	Planned Hours		8.00	16.00	8.00		88.00	16.00	8.00	40.		.00 1=:	1
	· Archi			01/01/2023	12/31/2023		12/31/2023	224.00	Planned Hours		8.00				56.00		8.00	40.			
	<u>A</u>	Cincly Snow				01/01/2023	12/31/2023	80.00	Planned Hours						8.00			40.		.00	
	A	Dawn Kessner				01/01/2023	12/31/2023	64.00	Planned Hours						24.00		8.00			.00	
	*	Karen Kebrick				01/01/2023	12/31/2023	48.00	Planned Hours		8.00				24.00				16		
	0	Steph Rusner				01/01/2023	12/31/2023	32.00	Planned Hours										32		
	* Engli			01/01/2023	12/31/2023		12/31/2023	64.00	Planned Hours						8.00					.00	
		Anny Miller				01/01/2023	12/31/2023	16.00	Planned Hours						8.00					.00	
	2.	Jane Hank				01/01/2023	12/31/2023	32,00	Planned Hours											.00	
		Michelle Perry				01/03/2023	12/31/2023	16.00	Planned Hours											.00	
	* Inter			01/01/2023	12/31/2023		12/31/2023	72.00	Planned Hours			16.00	8.00		24.00	16.00				.00	
		Any Janny Tara Malley				01/01/2023	12/31/2023		Planned Hours				8.00		8.00						
	n					01/01/2023	12/31/2023	32.00	Planned Hours			16.00			8.00	16.00				.00	

Easily Identify Critical Path

- » Show Critical Path option (toggle) in plan
 - » "Critical path" is all work items that would impact project end if moved forward 1 day
- » Expand/Collapse All option within the Gantt chart



≡ Deltek Vanta							Concina Asso	ciates LLC (Nav PSM) 🔻 🛛	Period Enc 18/31/2022
Plan Find project	T Selection 👻 考 1 of 1	>							
DG Enterprises N	larco Island							Check Out Save E	Jaseline
25 Last modified 07/20/2023 10:36 a	s by Dawn Kessner 🖌 Plan is checked out to me.								
	Scale: Entire Project in quarters 😰 Expand/Collapse All	Show Critical Path							Put
	CONTRACT SCHEDULE LABOR EXPENSES	CONSULTANTS UNITS							
	LEVEL	PLAN START PLAN END DU	URATION PREC	2023 Q1 01/01 - 03/31	2023 Q2 04/01 - 06/30	2023 Q3 07/01 - 09/30	2023 Q4 10/01 - 12/31	2024 Q1 01/01 - 03/31	
WON - REPEAT CLIENT	1 V DG Enterprises Marco Island	04/01/2023 03/22/2024	254		DG Enterprises Marco Island				1
Project Number	1.1 V PreDesign	04/01/2023 08/13/2023	94		PreDesign				
25 Status	1.1.1	04/01/2023 08/13/2023	94		Task 1				
Active	1.1.2 Task 3	04/01/2023 05/10/2023	28		Task 3				
Organization Cohen Assoc Miami	1.1.3 Task 4	04/19/2023 05/10/2023	16		Task 4				
Architecture Project Type	1.1.4 Task 5	06/15/2023 07/26/2023	30		Task				
Office Buildings Responsibility	1.2 Schematic Design	08/14/2023 12/22/2023	95 1.1			Schematic Desig	· · · · · · · · ·		
Architect, Full Service	1.2.1 Task 6	09/12/2023 11/24/2023	54			Task			
Project Summary	1.2.2 Task 7	11/13/2023 12/08/2023	20				Task 7		
Stage Won - Repeat Client	1.2.3 Task 8	08/14/2023 12/12/2023	87			Task 8			
Capacity Calculation Included in Scheduled	1.2.4 Task 9	11/10/2023 12/07/2023	20				Task 9		
And Utilization Win/Loss Details	1.2.5 Task 10	11/27/2023 12/22/2023	20				Task 10		
Opportunity Details	1.2.6 Task 10.5	11/28/2023 12/22/2023	19				Task		
Project Details	1.2.7 Task 10.6	11/13/2023 12/22/2023	30				Task 10.6		
Plan Status	1.3 • Design Development	12/25/2023 03/22/2024	65 1.2				9 <mark>0</mark>	esign Development	1
Plan Start - End 04/01/2023 - 03/22/2024	1.3.1 Task 11	02/19/2024 03/22/2024	25					Task 11	
Show: Cost (USD)	1.3.2 Task 12	03/05/2024 03/22/2024	14					Tas	1
Contract \$0.00 JTD \$2,000.00	1.3.3 Task 13 1.3.4 Task 14	02/01/2024 03/01/2024 02/16/2024 02/29/2024	22					Task 13	
ETC Planned \$216.40	1.3.4 1858 14	12/25/2023 02/29/2024	49					r	
EAC Planned \$2,216,40	1.3.3 1356 13	12/23/2023 02/23/2024	42					5K 10	

Expedite Labor Planning

- » Fill hours per day into a selected range
- Expedite entry of labor plan by filling hours or percent of hours per day for selected period
- » Example: Tom is going to work on this project each day for the next two weeks for 3 hours per day

Vantagepoint 6.5

	• O •			
Fill Hours Per Day				? ×
DG Enterprises Austin copy / Design Deve	elopment / Plans		5	
Assignment Range	From *	To *		
ETC Assignment Date Range	3/1/2023	15 4/2	8/2023	15
Assign % of Employee's Hours per Day t				
			Fill	Cancel

Expenses and Consultants Planning in Calendar Period

» Support more detailed, granular and accurate planning for expenses and consultants as needed with the flexibility to turn on/off calendar periods with subrows in project planning

NOTE: Resource planning module required

Vantagepoint 6.5

-	Deltek Vantagepoint >	_		_		_			_	_	_		Cohen & Ass
													-DAMABERRY
P	an Find project	Selection	▼ 4 1of1	•									
T.	Paris Rail Construction M00000023 Last modified 7/28/2923 10:45 um by John Clarkson, PE 💙 Planis checks	ed out to me.											
5	Scale: Entire Project in months [2]												
1	CONTRACT SCHEDULE LABOR EXPENSES	CONSU	LTANTS U	NITS									
	LEVEL/EXPENSE TYPE Show Less	STATUS	PLAN	PLAN END	ASSIGNMENT	ASSIGNMENT	PLANNED	PLANNED BILLING	ETC COST	SUB-ROW	2023 7/1 - 7/31	2023 8/1 - 8/31	2023 9/1 - 9/30
	 Paris Rail Construction 		6/2/2023	12/31/2023	6/2/2023	12/31/2023	22,500.00	47,500.04	15,748.62	Planned Cost (USD)	2,516.70	2,844.39	3,573.82
										Planned Billing (USD)	4,880.93	5,433.81	7,891.54
	Predesign		6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Cost (USD)	1,125.97	1,321.22	2,183.08
										Planned Billing (USD)	1,125.97	1,321.22	4,136.58
	 Task 1 		6/2/2023	12/31/2023	6/2/2023	12/31/2023	12,500.00	20,500.04	9,457.23	Planned Cost (USD)	1,125.97	1,321.22	2,183.08
										Planned Billing (USD)	1,125.97	1,321.22	4,136.58
	2-Person Survey Crew				6/2/2023	12/31/2023	500.00	500.00	424.11	Planned Cost (USD)	13.39	102.68	93.75
										Planned Billing (USD)	13.39	102.68	93.75
	Fax Expense				9/1/2023	12/31/2023	4,000.02	12,000.06	4,000.02	Planned Cost (USD)			976.75
										Planned Billing (USD)			2,930.25
	Long Distance Telephone	-			6/2/2023	12/31/2023	4,000.02	4,000.02	2,516.57	Planned Cost (USD)	556.30	609.27	556.30
										Planned Billing (USD)	556.30	609.27	556.30
	Mileage				6/2/2023	12/31/2023	3,999.96	3,999.96	2,516.53	Planned Cost (USD)	556.28	609.27	556.28
										Planned Billing (USD)	556.28	609.27	556.28
	 Schematic Design 		6/2/2023	12/31/2023	6/2/2023	12/31/2023	9,000.00	27,000.004	5,662.25	Planned Cost (USD)	1,251.65	1,370.86	1,251.66
										Planned Billing (USD)	3,754.96	4,112.59	3,754.96
	 Design Development 		6/2/2023	12/31/2023	6/2/2023	12/31/2023	1,000.00		629.14	Planned Cost (USD)	139.08	152.31	139.08

Plan Project Expenses & Labor with Unit Planning

- Plan in quantity in addition to hours or amounts to ensure you capture all project costs
- » Plan for project components like survey crews, tests, equipment, inspections, etc.
- » Plan units across calendar periods

NOTE: Resource planning module required

Vantagepoint 6.0

VON-REPEAT CLIENT		IR EXPENSES CONSULTANTS	UNITS					
WON-BEPEAT CLENT 2 Project Type V Office Buildings V Responsibility V Architect, Full Service Project Summary	ITRACT SCHEDULE LABC		UNITS					
WON-BEPEAT CLIENT 2 Project Type V Office Buildings V Responsibility V Architect, Full Service Project Summary	Show Less LEVEL/UNIT NAME		UNITS					
WON - REPEAT CLIENT 2 Project Type V Office Buildings V Responsibility V Architect, Full Service Project Summary	EVEL/UNIT NAME							
Project Type	2200067.00 HF - Turtle Island Resor	ACCOUNT	ACCOUNT TYPE	ASSIGN END	ASSIGN START	BASELINE BILLING	BASELINE QUANTITY	CALCULATED % COMPLETE BILLING CO
Office Buildings Responsibility Architect, Full Service Project Summary				4/21/2023	11/15/2022	465.00	111.00	0.00 1
Responsibility Architect, Full Service Project Summary	000 Project Planning			2/6/2023	11/15/2022	465.00	111.00	0.00
Architect, Full Service Project Summary	 001 Work Planning 			2/6/2023	11/15/2022	425.00	61.00	0.00
	2-Person Field Crew	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	225.00	1.00	0.00
Pursuit Details	Concrete Sample Test	Misc Reimbursable Expense - 529.00	Reimbursable	2/6/2023	11/15/2022	135.00	9.00	0.00
	Concrete Sample Test	Travel, Meals & Lodging - 621.00	Direct	2/6/2023	11/15/2022			0.00
 Project Details 	Pickup Truck	Misc Direct Expenses - 629.00	Direct	11/20/2022	11/15/2022	25.00	1.00	0.00
Plan Status Published	Reproductions	Reproductions - 522.00	Reimbursable	11/30/2022	11/15/2022	40.00	50.00	0.00
Plan Start - End 11/15/2022 - 8/21/2023	 002 Agreements 			12/20/2022		40.00	50.00	0.00
Show: Billing (USD) V	003 BIM Execution Plan							0.00
Contract \$42,550.00	001 Predesign			4/21/2023	3/27/2023			0.00
ETC Planned \$995.93				4/21/2023	3/21/2023			
EAC Planned \$895.92								0.00
Labor Multipliers Target 3.35	004 Design Development							0.00
EAC Planned 42.67								

Schedule Dependencies

- » Manage project critical path
- » Build visual schedule and identify dependencies
- » Quickly understand, react and adjust project schedule
- » NOTE: Resource Planning module required

Vantagepoint 5.5

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	Deltek Vantage	point >											Cohen & Associates L	LC (Nav PSM) 🔻	Period 03/31/2
Pla	An Find project		1	DG Enterprises	Projects 🔻 ┥ 13 of	28 🕨									
t:	DG Enterprises Marc 0000000.25 Last modified 04/19/2022 05:52 pm by 0		Plan is checked o	ut to me.									Check	Out Save Baselin	e P
5	Scale: Entire Project in months 🖄													Not Published Sum	mary !
1	CONTRACT SCHEDULE	LABOR	EXPENSES	CONSULTA	NTS										
	LEVEL	PLAN START	PLAN END	DURATION	2022 04/01 - 04/30	2022 05/01 - 05/31	2022 06/01 - 06/30	2022 07/01 - 07/31	2022 08/01 - 08/31	2022 09/01 - 09/30	2022 10/01 - 10/31	2022 11/01 - 11/30	2022 12/01 - 12/31	2023 01/01 - 01/31	
	 DG Enterprises Marco Island 	03/31/2022			DG Enterprises Marco Is	land									
	▼ PreDesign	04/04/2022	06/01/2022	43	PreDesign		7								
	Task 1	04/11/2022	05/03/2022	17	Task 1	7									
	Task 2	05/04/2022	05/18/2022	11		Task 2									
	Task 3	05/04/2022	06/01/2022	21		Task 3									
	Task 4	05/13/2022	06/01/2022	14		Task 4	+								
	Task 5	04/04/2022	05/13/2022	30	Task 5	•									
	▼ Schematic Design	06/09/2022	10/18/2022	94			Schematic Designment of the second	pi			?				
	Task 6	08/11/2022	09/07/2022	20					Task 6						
	Task 7	09/08/2022	10/18/2022	29						Task 7					
	Task 8	09/08/2022	10/11/2022	24						Task 8					
	Task 9	08/10/2022	10/11/2022	45					Task 9		+				
	Task 10	06/09/2022	08/10/2022	45			Task 10		4					Task 14 (start) Task 15 (end)	
	 Design Development 	10/19/2022	03/03/2023	98							Design De	evelopment		100.15 (010)	
	Task 11	10/19/2022	12/26/2022	49							Task 11				
	Task 12	12/27/2022	02/10/2023	34									+	ask 12	
	Task 13	12/27/2022	01/21/2023	19									<mark>ц</mark> т	ask 13	

Easily Monitor Upcoming Tasks & Access Key Data

- Easily see projects scheduled from dashboard in My Upcoming Assignments dashpart
- Control what revenue amounts are used in pipeline
- Better visibility into invoice billing client and AR comments from dashboard

CONFIDENT

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New Dashboard 💾 Save < Share 🗐 C	opy 🗊 Delete	I Options	+ New Dashp.		V	an	tage	por	nt_	ວ.ບ	
Upcoming Assignments (j)							× 1				
ecast Range: 6 months beginning January 202	2 🛛				Show	w Capacity: Ut	ilization % 🔹 🛈				
LEVEL	2022 1/1 - 1/31	2022 2/1 - 2/28	2022 3/1 - 3/31	2022 4/1 - 4/30	2022 5/1 - 5/31	2022 6/1 - 6/3	E AJ				
Totals	9%	9%	57%	9%	6%	096	- A				
Adelphi Research Lab	15	14	17	15	11						
▼ PreDesign	15	14	17	15	11		- I.				
Code Analysis	15	14	17	15	11						
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Educational Educational Facilities Environmental Medical Office Buildings Transportation	Project Managers Trev Bushbord & Sove Ny Projects - Profit 36	Review	🗑 Delete 🔠 Options	My Project S PROJECT NAM TOTALS All Children's	Hespital	11,644,232.00 USI 14, 3,562,352.00 USD 3,5	572,007.56 USI 2,180,330.95 95,835.40 USD 95,070.91 U		BACKLOS (A.8) -2,504,530.58 US -32,483.40 USD	UNBILLED (B - D) 0 5,999,712 96 USD 1,176,823.16 USD	Da Da Will D 7,501 1,326
Educational Educational Facilities Environmental Medical Office Buildings	Project Managers Trev Bushbord & Sove Ny Projects - Profit 36	Review	🗑 Delete 🔠 Options	My Project S PROJECT NAM TOTALS All Children's Cape Cod Vac	napshot E I I Hospital I ation Club I	11,644,232.00 USI 14, 3,562,352.00 USD 3,5 5,150,000.00 USD 6,9	972,007.96 USI 2,188,100.95 15,835.40 USD 95,070.91 U 12,671.18 USD 1,145,133.64 U	BLLED (0) 9,977,374.40 USD 50 2,419,012,24 USD 50 2,152,600,18 USD	BACHLOG (A. 8) - 2,904,930.58 US - 33,483.40 USD - 1,822,671.18 USD	UNBILLED (8-1) 6 5,999,712.96 USD 1,176,723.36 USD 4,820,063.00 USD	Da Da Da Da Da Da Da Da Da Da Da Da Da D
Educational Educational Facilities Environmental Medical Office Buildings Transportation	Project Managers New Bashbourd Managers New Bashbourd Managers New Projecta - Profile X	Review a copy	Dekte III Options	My Project S PROJECT NAM TOTALS All Children's Cape Cod Vac Moscore Schi	napshot E I I Hospital I ation Club I	11,644,233.00 USI 14, 3,562,352.00 USD 3,9 5,150,000.00 USD 6,9 580,000.00 USD 12	572,007.56 USI 2,180,330.95 95,835.40 USD 95,070.91 U	BLLED (N) USD 8,373,374.460 USD SSD 2,419,012,24 USD SSD 2,152,568,18 USD SSD 170(911.00 USD	BACKLOS (A.8) -2,504,530.58 US -32,483.40 USD	UNBILLED (B - D) 0 5,999,712 96 USD 1,176,823.16 USD	00 00 00 0 7,500 0 1,326 1 4,962 1 4,962
Educational Educational Facilities Environmental Medical Office Buildings Transportation	Project Managers New Bashbourd Managers New Bashbourd Managers New Projecta - Profile X	Review a copy	🗑 Delete 🔠 Options	My Project S PROJECT NAM TOTALS All Children's Cape Cod Vac Moscore Schi	Hospital : Hospital :	11,644,232.00 USI 14, 3,562,352.00 USD 3,9 5,150,000.00 USD 6,9 580,000.00 USD 12 982,557.00 USD 1	872,007.56 USI 2,188,130.95 85,835.40 USD 95,070.91 U 72,671.18 USD 1,145,133.64 U 70,091.00 USD 93,030 U	BLLED (0) USD 8,972,974.640 USD SD 2,419,912,240 USD SD 2,152,608.180 USD SD 176,951.00 USD SD 16,850.00 USD	BACHLOS (JA 8) -2,004,030,56 US -33,483,40 USD -1,822,671,18 USD 389,309,00 USD 945,707,00 USD	UHBILLED (8-1) 5,999,712,94 USD 1,176,823,16 USD 4,820,063,00 USD 0,00 USD 0,00 USD	01 01 02 03 03 04 04 05 04 05 04 05 04 05 04 05 04 05 05 05 05 05 05 05 05 05 05 05 05 05
Educational Educational Facilities Environmental Medical Office Buildings Transportation	Project Managers Nex Baldoard M See Ny Projects-Pond X 73 54 55 55 56 56 56 56 56 56 56 56	Review a copy	Deker IE Options	My Project S PROJECT IVAN YOTALS All Children's Cape Cod Vac Moscone Sch Oakhune Eler Page Commu	Hospital : Hospital :	11,644,232.00 USI 14, 3,562,352.00 USD 3,55 5,150,000.00 USD 6,97 560,000.00 USD 1 982,557.00 USD 1 850,000.00 USD 2,27	85,835,40 USD 95,070,91 U 86,835,40 USD 95,070,91 U 72,671,18 USD 1,145,133,64 U 9,091,00 USD 93,038,93 U 6,850,00 USD 400,000,00 U		BACHLOS (JA 8) -2,004,030,56 US -33,483,40 USD -1,822,671,18 USD 389,309,00 USD 945,707,00 USD	UHBILLED (8-1) 5,999,712,94 USD 1,176,823,16 USD 4,820,063,00 USD 0,00 USD 0,00 USD	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
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Improve Team Management and Project Analysis

- Better evaluate and adjust team assignments with enhanced search and project filters
- » More specific searches to ensure the right people are available for your projects
- » In-depth project analysis: planned, actual and baseline in one view
- More proactive project management and insight into project performance

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	Plan		ACTIVE Search Proje	cts		▼	of 352 🕨							
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Vantagepoint 5.0

Improve Resource Planning Accuracy

- » Redistribute Planned Hours
 - Replace planned hours with actual hours and spread difference
 - » Changed planned hours
- » Update "JTD Through" date for resource planning applications
- » Save resource view search for others



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Revenue Forecasting in Projects

- » More accurate and granular view of potential revenue
- » Create revenue forecasts for individual projects
- » Enter ETC Planned Revenue at any level
- » Easily update forecasts
- » Run reports to show pipeline and forecasted revenue by periods
- » Compares to Backlog

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(1)										
	LEVEL	STAGE	FORECAST START	FORECAST END	COMPENSATION	J EA	2020 09/14 - 09/30	2020 10/01 - 10/31	2020 11/01 - 11/30	2020 12/01 - 12/31	202 01/01 -
	1900003.00 DG Element	Won - R	₹ 09/14/2020	03/02/202	2 81,000		1,565	3,129	2,988	3,272	
	 003 Schematic Design 		09/14/2020	05/12/202	1 37,500		1,565	3,129	2,988	3,272	
	003 Architecture Ta		09/14/2020	05/12/202	1 15,000		925	1,564	1,494	1,636	
	004 Engineering Ta		09/18/2020	02/23/202	1 22,500		640	1,565	1,494	1,636	
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	003 Architecture Ta		07/08/2021	01/27/202	2 31,500						
	004 Engineering Ta		09/06/2021	03/02/202	2 12,000						

Deltek

Vantagepoint 3.5

Project Review Drill Down

- » Empower PMs to better monitor project details
- » Direct, indirect and reimbursable expenses
- » Direct and reimbursable consultants
- Similar to labor drilling in a single place with expand/collapse functionality

Vantagepoint 3.5

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Project Review	Edit Search 🔻 Find project		▼ 4 50+ res	cords 🛈 🕨							+	New Pro
DG Enterprises Sy 1900001.00 Principal: William Berry, PE Proje	dney Office ct Manager: Dawn Kessner Supervisor	Rachel Benze								S	how: Bill	ling (USD
pdate % 🔻 Options Other Act	ions 🔻											Published
	CONTRACT/FEE	PLANNED BILLING	BUDGETED BILLING	PLANNED VARIANCE		BUDGETED VARIANCE		JTD BILLING	ETC PLANNED BILLING	ETC BUDGETED BILLING		C PLANN BILLING
Directs												
Total Labor	30,000.00	30,000.00	30,000.00					3,880.40	26,000.00	26,000.00		29,88
Direct Labor Hours Average Rate/Hour		300.00 100.00	Labor at Burden					40.00	200.00	200.00	? >	30
Direct Expenses											X 0	
Compensation	30,000.00	30,000.00									~ ~	9,88
Direct Consultants	6,000.00	6,000.00	NAME	DATE	HOURS	AMOUNT	POSTED	COMMENT				6,00
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Reimbursables				8/14/2017	8.00	696.00	~	Chupa ch	ups tootsie roll pie. C	hocolate bar muffin ca	ake ro	
Reimbursable Expenses				8/14/2017	7.00	609.00	~	Topping c	hupa chups lemon. r	marshmallow sweet ro	а.	
Reimbursable Consultants				8/13/2017	8.00	696.00	~	Tootsie ro	а.			
Total Reimbursables			Bailey Balanca		19.50	1,725.75	~	Cake gum	mi bears wafer muff	in cake cheesecake		_
Total	36,000.00	36,000.00	Cory Thames		22.50	1,605.38	~	Carrot cal	e toffee powder cak	e chupa chups bear cla	aw.	5,880
	4		Dean Swartz		33.00	2,390.85	~	Gum.				
Key Performance Indicato												
											Close	
Revenue	Variance JTD Earned Variance: -3,880	**										
JTD Earned Revenue:	JID Earned Variance: -0,000	.40	Realization Ratio:		JIDEa	rned % Comple	te:	P	udgeted Hours % Exp	ended: 15.5570		

Visual Project Scheduling

- Easier to view gaps and overlap in project schedule
- » Quickly shift and update schedule as deadlines and projects change
- » Improve project schedule and resource assignment accuracy
- » Export Gantt Chart
- » Plan labor to the labor code level

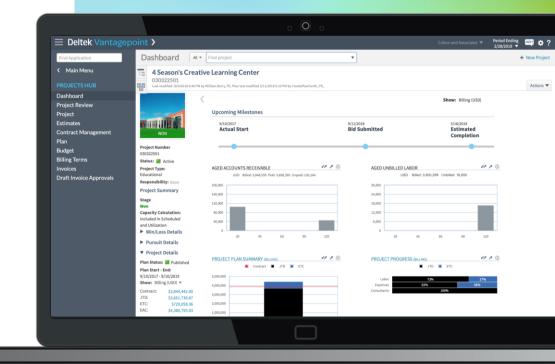
Vantagepoint 3.0

Deltek Vantagep	oint >									Coher	& Associates LLC 🔻	Period Ending 8/1/2018 🔻	ee 🛛 🔤
DG Enterprises Projects - Sp		ojectx		◀ 4 of 4 ►									+ New Projecto
DG Enterprises St. Lou 1700089.00 Plan last modified 10/14/2019/02.24 am by		-										Church Out	Other Actions 🔻
icale: Entire Projects in months	072085251540482	CSENNISTECUZIU	5										w: Billing (USD) *
CONTRACT SCHEDULE	LABOR I	EXPENSES	CONSULTANTS	iX.									
LEVEL	PLAN START	PLAN END	DURATION	2019 10/1 - 10/31	2019 11/1 - 11/30	2019 12/1 - 12/31	2020 1/1 - 1/31	2020 2/1 - 2/29	2020 3/1 - 3/31	2020 4/1 - 4/30	2020 5/1 · 5/31	2020 6/1 - 6/30	2020 7/1 - 7/31
DG Enterprises St. Louis	9/30/2019	8/5/2020	267 0	XG Enterprises St. Lo	#s								
 Schematic Design 	10/24/2019	3/6/2020	116	Sch	rematic Design								
 First Floor 	10/30/2019	1/3/2020	57		First Floor								
Design / Senior Architect	11/3/2019	1/3/2020	53		Design / Senior Arch	nitect//_/_		D					
Design / Senior Engineer	11/3/2019	1/3/2020	53		Design / Senior Eng	ineer///_							
 Second Floor 	12/17/2019	3/6/2020	70			Second F	loor						
Design / Senior Architect	12/17/2019	3/2/2020	66			Design / S	ienior Architect //	_1_					
Design / Senior Engineer	12/21/2019	3/6/2020	66			Design	/ Senior Engineer /	1_1_					
 Design Development 	3/6/2020	8/5/2020	131						Design Developm	nt			
 First Floor 	3/6/2020	5/18/2020	63						First Floor				
Design / Senior Architect	3/17/2020	5/18/2020	54						Design / S	enior Architect / / _	_/_		
Design / Senior Engineer	3/6/2020	5/7/2020	54						Design / Senior En	gineer//_/_			
 Second Floor 	4/17/2020	8/5/2020	95							Second F	loor		
Design / Senior Architect	4/17/2020	8/5/2020	95							Design / :	Senior Architect / /	.1_	
Design / Senior Engineer	4/17/2020	8/5/2020	95							Design/S	Senior Engineer / /	./_	

One Project Command Center

- » Track the entire project lifecycle in one place
- Eliminate duplicate records and processes with pursuits, project plan, invoices and more in one hub
- Easily review and approve draft invoices from projects hub
- » View project-specific metrics with a project-centric dashboard

Vantagepoint 2.0



Deltek.

CRM and Pipeline Management

Pre-Award Number for Projects

- Allow for separate project **>>** numbers for in-pursuit projects and billable projects
- Change project number when **>>** approved for use in processing
- Use with or without auto-**>>** numbering
- » Supports customer desired intelligence in project number

E Deltek Vantagepoint > **Projects** ind Application Find project ▼ My Active ▼ ◀ 38 of 55 ► 🔚 ÷ Natick Mall Renovation 2018300.00 > 3DD Design Development Main Menu Last modified 1/7/2022 09:05 pm by JoAnne Smith, PhD Assign New Project Number)ashboard A new project number will be assigned for Natick Mall Renovation because it is approved for Project Review use in processing. Proiect AWARDED - REPEAT Because you are changing the project number, anyone currently working with this project in stimates other areas, like contract management, budgeting or billing terms, will not be able to save their Contract Management Phase Number changes and will get an error. 3DD Revenue Forecast Would you like to continue? Status Active Project Type Budget New Project Number * **Billing Terms** Responsibility nvoices Draft Invoice Approvals Project Summary Keep Existing Number Assign New Numbe Cancel Stage Awarded - Repeat Client **Capacity Calculation** Revenue Methods Included in Scheduled and

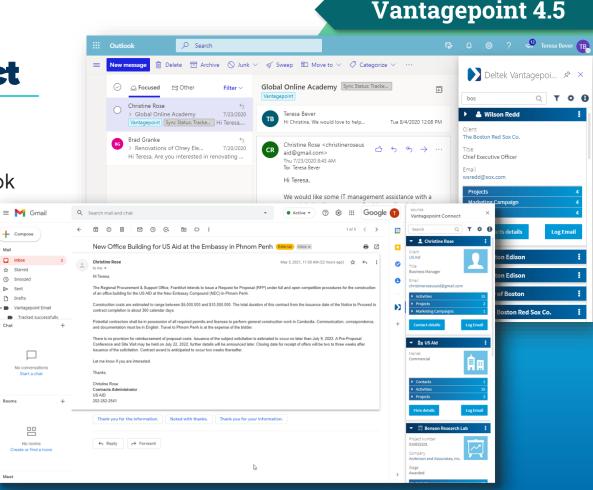
Vantagepoint 6.0

Deltek

Plan

Vantagepoint Connect

- Capture key data where BD and **>>** PMs live – in Outlook or Gmail
- » Contextual email pane in Outlook or Gmail
- Eliminate duplicate entry of **>>** contacts and activities
- Easily update from anywhere **>>**
- NOTE: Included with **>>** Vantagepoint CRM



Deltek

Mall

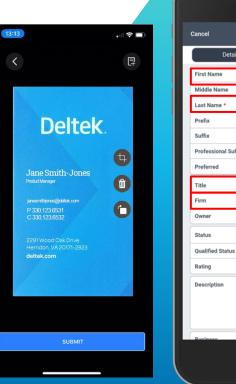
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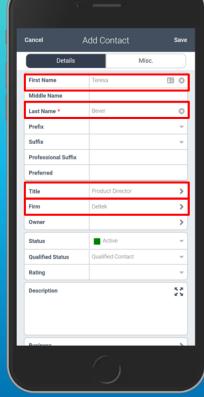
Meet

Capture Contact Info Faster

- » No more typing in stacks of business cards after in-person events
- » Quickly scan a business card
- Capture key contact details and automatically create a new contact in Vantagepoint CRM
- » Leverages ICR to read text from images to populate the form



Vantagepoint 5.0



New Proposal Builder

- » Create sleek, impressive proposals to position your firm to win
- » Visual proposal builder makes it easier to build the right proposal
- » Drag and drop proposal elements
- » Easily insert graphics and pictures
- Merge project, employee and company details from Vantagepoint
- Create templates to streamline proposal creation





Improve Proposal Flexibility

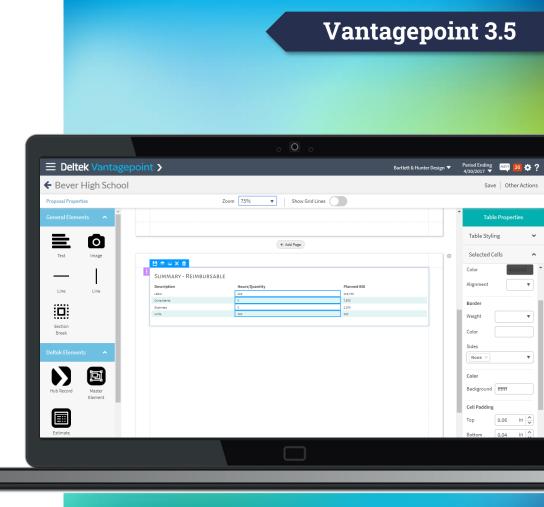
- » Leverage the power of the WYSIWYG Editor
- » Link Text Elements
- » Export Proposals to Word
- Improve flexibility for content creation and collaboration with other team members and companies

Vantagepoint 4.5

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-	revenue. At Deltek our mission is to deliver solutions that help our customers connect and automate the		Border		V
Line Line	project lifecycle that fuels their business:				
	 Win by streamlining business development – We provide solutions that help you find and win new opportunities. 		Weight		•
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be drogged from the clipboard to a new place in your	 Measure strong financial results through project-based ERP – Deltek solutions help customers measure performance and ask the right questions to manage their business. 				

CRM & Proposal Enhancements

- Save time for proposal creation and marketing campaigns
- » Quickly add estimates and format as needed for proposals
- » Add multiple contacts to a marketing campaign
- » SF330 now available in the Desktop client



Deltek.

Project Accounting and Financial Management

Forecast AR Collections

- » New AR Collections dashpart now available, forecasting invoice payments by week or period
- » Predict when payments will be received to better plan for the future
- Identify potential challenges earlier to quickly adjust to minimize the impact on the bottom line

Forecast invoice payments to better predict cash flow

Vantagepoint 7.2

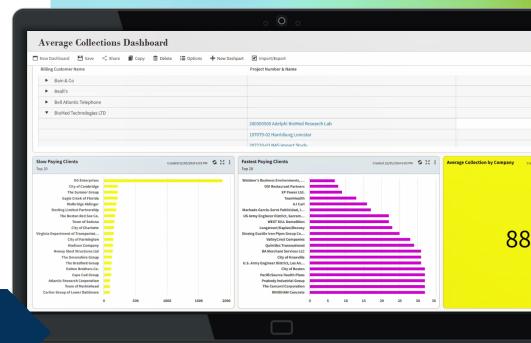
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Average Collection Period by Project

- » How long does it take on average to get paid by a client?
- » Average collection period by project
- Can look at slowest paying or fastest paying
- » Can sort by PM, client, etc.
- » Better forecast cash flows with more insight into past trends

Better Manage Cash Flow and More Intel on Average Collection Periods by Project

Vantagepoint 7.1



Streamline Creating Billing Terms

- » Automate creating fee-based phase billing terms
- » Easily create terms from project work breakdown structure and compensation values in Project Hub

Vantagepoint 7.0



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Automate time-consuming billing processes to improve accuracy and efficiency

Improve Timesheet Efficiency with Timesheet Assist

- Quickly update timesheets with project suggestions, including projects used on recent expense reports
- » Ensure timesheet accuracy with reminders of approved absences
- » Fewer steps to get timesheets updated and submitted

Quickly update timesheets with project suggestions and reminders of absences

Vantagepoint 7.2

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eltek Vantagepoint >							Cohen and Asso	ciates 🔻	Period Ending 6/30/2019 🔻	
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Timesheet Assist in Mobile T&E

- Improve timesheet efficiency with Timesheet Assist, now available in Mobile T&E
- Quickly update timesheets with project suggestions and reminders of absences.

Access Timesheet Assist through Mobile T&E

Deltek.

Timesheet Reminder Dismiss Snooze Timesheet Period: 05/10/2024 - 05/28/2024 A Your timesheet is due in 7 days Let's complete your timesheet. (i) This timesheet does not contain any approved absences This timesheet does not contain any holidays Project Suggestions Select All 2000012-00 Baltimore Park 02A, Feasibility Study 021, Principals Cartier Group of Lower Baltimore 303225-01 4 Season's Center 001. Development 021. Principals Calvert County Schools 608185-02 Beaverton Center 007 Phase 2 123. Research Tallory Corporation Add Selected to Timesheet Go to Timesheet

Vantagepoint 7.2

Update Timesheet with Approved Absence Request

- » Auto-populate timesheets with approved absence/PTO requests
- » Expands on automation of timesheets with previous holiday hours
- » Fewer steps to get timesheets updated and submitted

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Vantagepoint 7.1

Simplify timesheet entry with automatic update of approved absence hours

Vantagepoint 7.0

Timesheet Assist

- » Streamline timesheet entry with suggested projects based on user activity and resource assignments
- » Suggest projects for timesheets based on:
 - » Past timesheets
 - » Project plan assignments
- » Timesheet reminders

Streamline timesheet entry with project suggestions via Timesheet Assist



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ICR for AP Invoice Approvals

- Automate the creation of AP invoice approval records with intelligent character recognition (ICR) technology
- » Eliminate manual data entry of AP invoice details
- » Improve approval review for project managers and accounting

AP Invoice Approvals	ap invoice approval	T All	▼ ◀ 58 of 77		+ Uph
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Purchase Order	Invoice Amount ①	Currency USD × ¥	Route To	Employeex	100 Cambridge Park Drive, 5th Floor Cambridge,MA 02140
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+ Add Project					

Vantagepoint 6.5

Vantagepoint 6.5

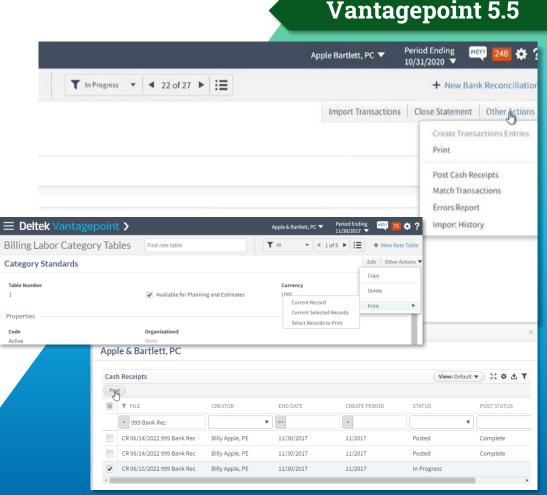
Retain Voided Invoices

- » Retain copies of voided invoices
- » The "VOID" watermark will show on all pages before and after posting
- » Will show on all pages including back-up documentation

Interactive Billi	ng Find project	T Selection	▼ < 1 of 1 ►				
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Accounting & Financial Management Enhancements

- Streamline entry of deposits by posting cash receipt directly from bank
- Expanded reporting to support key details within timesheets and billing
- » Print billing category rate table report
- Overtime premium calculated using cost rates defined in the Billing Labor Override table



Streamline Purchasing

- Enable purchasing requisitions in the browser
 - Add vendor on the fly, attach documents at any status, approvals in the browser
- » Purchasing reports now available in the browser

Vantagepoint 5.5

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Vantagepoint 5.0

Streamline Vendor Payments

- » Deltek Payments for Vantagepoint
- Optimize outbound payments with integration to Corpay
- » Digitally transform your cash flow
- » Cost savings and virtual card payment rebates
- » Note: does require initial onboarding with Corpay



Streamline Bank Reconciliation

- » Automate cash transaction even further
- » Create cash receipts for ACH and wire payments from automated bank transaction
- » Speed up final invoicing with email templates in interactive billing
- » Automated bank feed now available for on-prem customers in North America

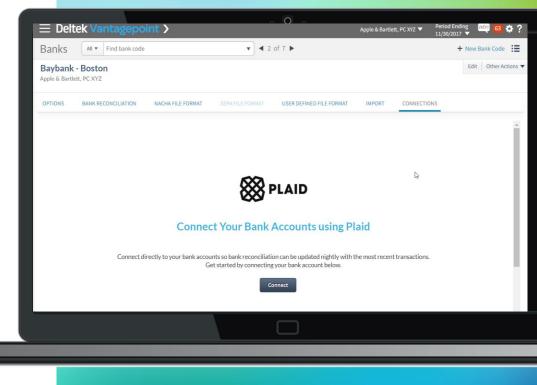
Vantagepoint 5.0

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Vantagepoint 4.5

Automatic Bank Feed

- » Automate manual bank imports
- Simplify bank reconciliation with direct connection to bank accounts
- » Updated nightly with recent transactions
- » NOTE: Currently Cloud Only and supporting North American banks
- » Integration with PLAID



Manage Purchase Orders More Easily

- Manage purchase orders and items in any browser (must enable)
- » Access purchase order form from browser
- » New "Mark Final" process
- » Add vendors on the fly
- » Attach documents regardless of PO status

Vantagepoint 4.5

		0 O 0		
🖥 Deltek Vantag	epoint >			Bartlett Enterprise
Purchase Orders	My Open Purchase Orders *	Find purchase order	✓ 21 of 30 ►	
Boat Store of Orange Number 163 (Standard) Bartlett Enterprises America	Beach			
Status: In Progress, Open				Save C
GENERAL AGREEMENT	SHIPPING COMMENTS	LINE ITEMS BILLING	CLAUSES DEFAULT DISTRIBUT	TION
Purchase Order Informa P.O. NUMBER 163		RELEASE WUNDER		TYPE* Standard
ORDEH DATE *		CURRENCY CODE		BUVER*
7/23/2020		USD - US Dollar	•	Tom Scholz
▼ Vendor				View Buyer Details
VENDOR*		ADDRESS*		VENDOR CONTACT
Boat Store of Orange Beach		Guld Shores, AL	*	Smith, Carl
View Vendor Details		3829 Gulf Shores Parkway		(Phone) 251-111-1111

Digital Markup of Draft Invoice

- Replace physical red lines with digital markups
- » Visually see markups and changes
- » Same view for PM and biller to improve communication
- » Improve PM adoption of Vantagepoint



Draft Invoice Approvals Wy brait invoices * Find project I of 2 * Print Approve * Other A 20020005.00 Invoice Date Period 301/2021 11/30/2021 - 12/31/2021 DRAFT PREVEW GENERAL LABOR E OPACT PREVEW GENERAL LABOR E 100 % * FEES INNOICE HISTORY	E Deltek Vantagepoint >			Apple & Bartlett, PC (Nav PSM) 🔻	Prior Period Ending 12/31/2020 V	HEV! 23
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Percent Previous Fee Current Fee	Search comments Position Page 1 JoAnne Smith – Mar 18, 5:23pm		STRUCTURAL ENGINEERS 1200 Central Avenue State 409 Sanismich, MA 01520 Project 2002005.00 Cap Project 2002005.00 Cap	March 18, 2021 Precision No: 2002005.00 Immole No: - Charl- e Cod Vacation Chait Administration for 60,000 SF resort in Fairnouth, MA.		
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Call last week with client said invoice payment was on the way 1/3 Total Fee 100,000 0 21,500.00 0.00 21,500.00 Total Fee 21,500.00						

Accounting and Billing Enhancements

- » More streamlined billing and invoicing
- » Cash receipt entry performance improvement
- Better visibility of bill-through dates in interactive billing and approvals
- » Option to resubmit draft invoice with new dates

Vantagepoint 3.5

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rals	Balboa Office Park 1999015.00 Invoice Date: 5/11/2020 Period: 4/1/2017 - 5/1/2017 Bill Through Date: 5/1/2017 Bill Through Date: 5/1/2017	Billing Session Options	Print Accent
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w	Fee Method Labor Method Overall Percent Complete Rate Table	Consultant Method By Account	

Enhanced Accounting & Billing

- Simplified draft invoice approvals with more details viewable to make the process easier
- Expedite final billing by making the accept process simpler, if you choose
- » Improved experience for biller and approver
- Transactional document management (TDM) now available for journal entries

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Dra	ft Invoice Ap	oprovals	All 💌	Find project		•	◀ 28 of 50+ ►					
	Adelphi Resea	rch Lab										
	003005.00 woice Date: 10/4/201	9 Period: 1	1/1/2018 - 11/	/30/2018								
GENE	AL LABOR	EXPENSES	UNITS	FEES	INVOICE HISTORY	INVOICE PREVIEW						
Lab												
Bill	Hold Write-off	Delete M	lodify Trans	fer								
	INVOICE STATUS	STATUS	BILLABLE	DATE	PHASE	TASK	LABOR CODE	CATEGORY DESCRIPTION	EMPLOYEE	NAME	HOURS	RATE
	Submitted	Bill	~	11/30/2018	3DD		000	Architect	00987	Fitzgerald, Meg	16,890.00	0.0000
	Submitted	Bill	~	1/1/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	3.00	250.0000
	Submitted	Bill	~	1/2/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	4.00	250.0000
	Submitted	Bill	~	1/10/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.0000
	Submitted	Bill	~	1/14/2020	1PD	PRO	000	Architect	00987	Fitzgerald, Meg	8.00	250.0000
	Submitted	Bill	~	7/7/2020	2SD	DOC	000	Architect	00987	Fitzgerald, Meg	8.00	0.0000
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	New	Hold	×	3/20/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
	New	Hold	~	3/21/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
	New	Hold	×	3/24/2012	5BD		100	Engineer	00019	Morgan, Dwayr	8.00	105.0000
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Vantagepoint 3.0

Deltek

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Vantagepoint 3.0

Streamlined Payroll

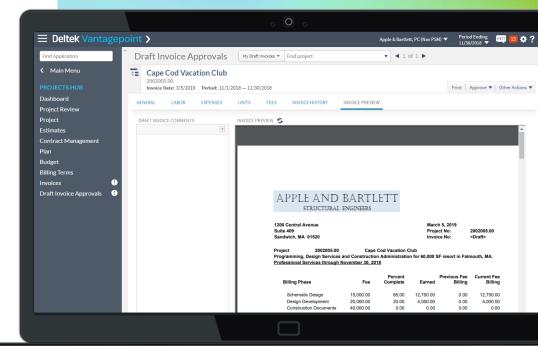
- Access payroll processing and direct deposit in Payroll Payments from the browser
- Streamlined and more consistent with employee payments and vendor payments
- » Employee pay details grid displays summary of selected employees to make review easier
- » Start automatic runs and edit to convert into manual run as needed

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Payroll Payr	nents ALL	. • Find p	ayment run			▼ ◀ 1 of 1	•			
Run Number 1 Payment Date: 10/8/3 Cohen & Associates L	2019 - Payment Run	Total: 135,29	98.71	F						
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Automatic Payment	10/8/2019 🗹									
Employee Pay De	etails									X \$ ± ₹
INCLUDE IN RUN	EMPLOYEE	E	MPLOYEE NAME		AL TIME	TOTAL		BANK CODE	TOTAL GROSS PAYMENT	NET PAYMEN
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1	00036	P	eter O'Leary		0.00	(0.00	BayBank Payroll	2,658.46	1,935.8
~	00037	J	ay Castro	1	L,601.00	(0.00	BayBank Payroll	0.00	0.0
1	00041	E	Iret Tushaus		0.00	(00.0	BayBank Payroll	2,584.62	1,930.8
	00043	K	levin Nichols		0.00	(0.00	BayBank Payroll	2,030.77	1,337.0
	00044	N	lartin Lee		0.00	(0.00	BayBank Payroll	2,658.46	1,886.7
	00059	G	irace Hamilton		0.00	(0.00	BayBank Payroll	1,698.46	1,115.3
	00061	H	ienry Carroll		0.00	0	0.00	BayBank Payroll	2,769.23	2,015.6
	00063	G	ilen Page		0.00	0	0.00	BayBank Payroll	6,461.54	4,188.7
1	00065	A	lexander Dane		0.00	0	0.00	BayBank Payroll	5,907.69	3,308.9
-	00066	c	hristine Benson		0.00	(0.00	BayBank Payroll	3,267.69	1,975.2
1	00071	S	ita Anderson		0.00	c	0.00	BayBank Payroll	2,843.08	1,783.3

Vantagepoint 2.0

Streamlined Billing

- » A more efficient overall billing process saves time for billers
- » Easily view and analyze unbilled transactions
- » Reduce time from draft to final invoice with draft invoice approvals
- » More information accessible and visibility into billing fee from interactive billing
- » Email final invoice to multiple contacts associated with projects



Improved Accounting

- Save time creating transactions while maintaining strong audit trail
- » Intuitive vendor payments
- » Single location for all actions related to transactions
- » Easily navigate between companies and fiscal periods
- » Key GL information available on dashboard

Vantagepoint 2.0

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TRANSACTION ENTRY									
All Transactions	AP Vouchers							X * 0 1	τ
AP Disbursements	Print Post Schedule To Post O	ther Actions 🔻							
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Cash Disbursements	Advanced Mechanical Technologie	14521	AMOUNT 9,245.00	11/20/2018	11/2018	ADMIN	In Progress		^
Cash Receipts							-		
Employee Expenses	Bell Atlantic Telephone	932533-00-1	356.00	4/20/2020	11/2018	ADMIN	Posted		
Employee Repayments Invoices	Bell Atlantic Telephone	85452-99	652.00	11/13/2018	Recurring	SMITH	In Progress		
Journal Entries	Diversified Electrical Technologies	\$ 3882-2828	5,678.00	4/20/2020	11/2018	ADMIN	Posted		
Labor Adjustments	Duplexx Printers	9288-22	980.00	4/20/2020	11/2018	ADMIN	Posted		
Miscellaneous Expenses	Fitzsimmons Engineering Inc.	89	765.00	4/20/2020	11/2018	ADMIN	In Progress		
Prints and Reproductions	Five Star Travel	988221	3,512.00	11/8/2018	11/2018	ADMIN	In Progress		
Timesheets	General Office Supply	82222-21488	293.00	4/20/2020	11/2018	ADMIN	Posted		
Units	Global Travel Consultants	9856423	982.00	11/7/2018	11/2018	SMITH	Posted		
Units By Project	Global Travel Consultants	0002321	100.00	11/6/2018	11/2018	SMITH	In Progress		
	Haley Hart Consulting	848398-22	8,900.00	4/20/2020	11/2018	ADMIN	Posted		
	Haley Hart Consulting	8292-00	23,000.00	4/20/2020	11/2018	ADMIN	In Progress		
	KED Engineering Services	0000451	86,000.00	11/7/2018	11/2018	SMITH	In Progress		۰.
	Philips Surveying and Design	0005124	5,600.00	11/8/2018	11/2018	SMITH	In Progress		•
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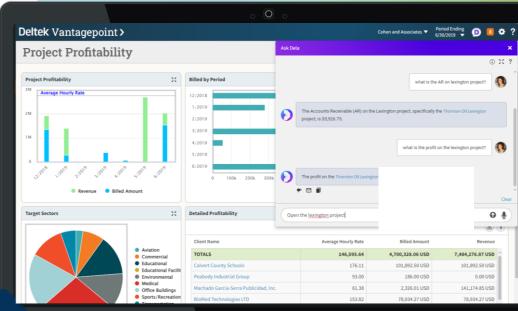
User Experience and Overall Usability

Find Data Faster with Ask Dela Enhancements

- » Open hub records and any application in the navigation menu using Ask Dela, your Al business companion
- Simplify navigation by using natural language to access
 Vantagepoint data, saving valuable time

Vantagepoint 7.2





Access the right data faster with Ask Dela

Vantagepoint 7.2

General Usability

- » Prevent duplicate records with enhanced duplicate check
- » Export data directly to Excel with new Search and Download action for reports
- » Display project performance metrics across different organization levels from your dashboard
- Streamline entry of billing fee from project compensation
- » And more!

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Vantagepoint 7.2

Opt-In Features

- Introduced in 7.2
 - » Purchase template editor in the browser
 - » Report administration in the browser
 - » 1099 initialization in the browser
- » Introduced in prior versions
 - » User Activity
 - » Form W-2 Processing
 - » Use OpenID Connect SSO provider for authentication
 - » * Create Request for Quote Only
 - » * Create Voucher From Purchase Order in the Browser
 - » * Explicit Save In List View
 - » * Row Level Validation for Transaction Center

* Will be enabled automatically in 2025.1 (2025 1Q)

Deltek Va	antagepoint >		Apple & Bartl	ett, PC (Nav F		Period Ending /28/2023 👻 🚺	1345	🧶 John C	larkso
Opt-In l	Features	d opt-in features	rds						
								×	¢
Area	Title	Description	Enabled 🗸	Reversible	Help Topic	Release Automatically Enabled	Module Dependenc	Modified By User	Da
Transaction Center	Row Level Validation for Transaction Center	With the row level validation in transaction center feature, you can work up and down a grid, making multiple changes, without being interrupted by required field validations. These validations are now moved to the save step.		Yes		2025.1	Any Module	ADMIN	7/
ogin & Iavigation Menu	Use OpenID Connect SSO provider for authentication	This feature enables OpenID Connect SSD providers for authentication. Once enabled, enter the OpenId Settings -> General -> Settings. If you already have Microsoft. Entra ID SSO configured and you opt into this feature, please be aware that you will need to update your redirect UBI in Azare for SSO to work successfully. Once enabled all Vantagepoint Navigation Menu Items for the Desktop and Web Applications will be shown vithin the Veb Application. The Desktop Application login dialog will no longer be used.		Yes		2025.2	Any Module	ADMIN	7,
Utilities	User Activity	The User Activity application is now available to be shown within the browser interface. Enabling this feature will display the User Activity application within the browser intead of the Beskop and has been reimagined to track all authentication and application archivity in Vantagepoint. Logic has also been introduced to remove activity older than 30 days.		Yes		2025.2	Any Module	ADMIN	7,
Purchasing	Create Request for Quote Only	Create Request for Quote (RFQ) now available in Purchase Requisitions. This new functionality allows a user to define a Purchase Requisition as RFQ only.		No		2025.1	Purchasin g		7
Purchasing	Create Voucher From Purchase Order in the Browser	Create Voucher from Purchase Order functionality now available in AP Transaction entry. If you own the Purchasing module, enable this feature to move the "Create Voucher from Purchase Order"		Yes		2025.1	Purchasin		7

Enhanced Search Capabilities

- Simplify searches for multiple values without complex "OR" statements
- » Improve time-bound searches to now include YEAR in this, next and last search criteria

Quickly create better search criteria to find the data you need

Vantagepoint 7.1

Selec	t Search 🔻 🛛 Hic	le Search Options + A	dd a Field	CI		records where		
	Employees - Sta	tus	=	Activ	/e Name C	ntains Mary OR Joh	n OR B	
	Employees - Sup	pervisor	 Starts With 	▼ ja; ri	; he		i	× :
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	Albert Ruiz	00240	Senior Interior Des	g Designer	Cohen Assoc Der	ver COR		Active
	Alex Lucas	C0203	Information Techn	l Surveyor	Cohen Assoc Cor	oor COR		Active
	Amy Ball	00299	Project Assistant		Cohen Assoc Der	ver COR		Active
	Betty White	00BH7	Administrative Ass	st Administrative	Bartlett Hunter B	osti BOS		Active

Vantagepoint 7.1

General Usability

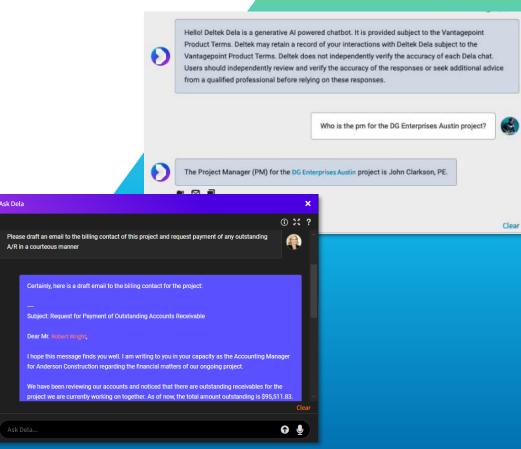
- Administrators can access personal dashboards to copy/remove as needed
- » Copy dashboards to all users in one click vs. clicking each role
- » Add Biller Name on Project
 Earnings Report
- » Right-click contextual menus to open applications or records in new tabs

	Options						
🗖 New Dashboard 🛛 💾 S	ave 🕐 Dashboard View View Option						
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Judy's Personal D	shboard				13		4
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Interact with Your Data via Deltek Dela™

- » Engage with Ask Dela, your Al business companion, through natural language and prompts
- >> Use GenAl to draft emails to communicate project status, outstanding AR, client updates and more
- Quickly get answers without running reports, viewing dashboards or opening specific records
- » Use Deltek Dela™ to ask questions about projects, employees, firms, contacts, activities



Improved User Interface

- » Updated user interface allowing easy navigation while maximizing screen real estate
 - » Updated navigation menu
 - » Fly-out menus
 - » Updated color scheme



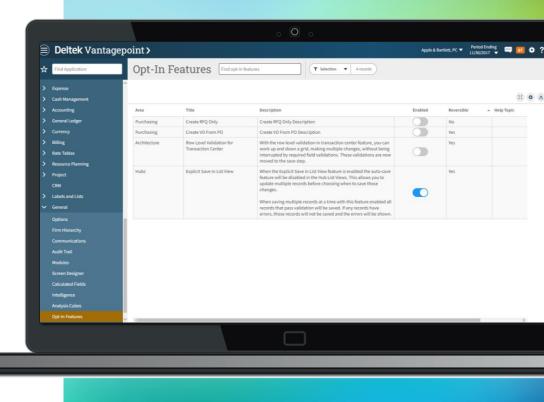


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₽	Firms >	Project Review								
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Vantagepoint 7.0

Opt-In Features

- Allow administrators additional control to transition to enable subset of features for additional testing prior to production
- » Note that opt-in period is a finite amount of time and features will be automatically enabled for all users at a later date



General Usability

- » Updated User Interface
- » Enhanced Navigation Menu
- » Explicit Save in List View
- » Bulk Update
- » Advanced WBS Search
- » Simplified Data Import for User Defined Hubs
- » Keyboard shortcuts
- » Mobile T&E absence requests

CONF

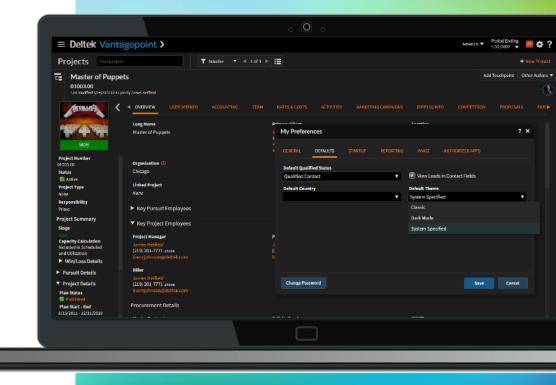
» Mobile CRM touchpoints

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Vantagepoint 6.5

Usability: Dark Mode

- » Give each user the flexibility to choose their display preferences with the new Dark Mode option for Vantagepoint
- » Will follow system settings by default
- » Can override in My Preferences



Usability: Simplify Timesheet Entry

- Pre-populate holiday hours in timesheet (Top 3 in Ideas Portal)
- Warning if entering hours in a different period than current period (Top 3 in Ideas Portal)

NOTE: These are also supported in mobile app

Timesheets	5 MY TIMESH	EETS 🔻 Fin	d timesheets		•					
Billy Apple, P	E 1/1/2	2023 - 1	/15/2023							_
pple & Bartlett, PC										
eriod Status: Open	Timesh	eet Status: I	n Progress							
LINE PRO	JECT*	PROJECT NAME		CLIENT NAME		PHASE	SUN 1/1	MON 1/2	TUE 1/3	WED 1/4
Vac	ation	Vacation								
Sick	k Leave	Sick Leave	2							
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Tom Scholz	3/26/2	2023 - 4	/1/2023							
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РТО	PTO									

Vantagepoint 6.5

Vantagepoint 6.5

Usability: Marketing Campaigns

- Marketing campaigns are now available in activities on the Vantagepoint CRM mobile app
- » Make it easier to connect specific activities to the campaign they are supporting from the mobile app

Cancel F	λαα Αςτινι	ty		Save
Details		Misc.		
Туре*	Meeting			-
Calendar Invitations*	Do Not Se	nd Invitatio	ns	-
Priority	Medium			~
Start Date*	06/27/20	23	0	#
Start Time*	12:00 PM		0	Û
End Date*	06/27/20	23	8	
End Time*	1:00 PM		0	Ů
All Day		(0	ff
Reminder	15 Minute	es		>
Project				>
Marketing Campaign				>
Show Time as	Busy			•
Private		(0	ff
Notes				

Usability: Editing Scheduled Reports

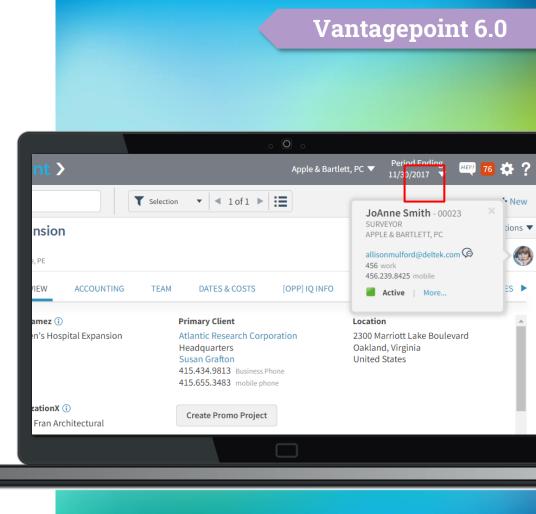
- » Edit scheduled reports as needed to adapt to changing needs of the firm
- » Make changes to recipients or body of the email
- » Update the report options or search criteria
- » Save time by simply editing rather than recreating scheduled reports

Another popular item from Idea Portal

Find Application	Reporting					
MY STUFF			ton at she			
Dashboards	FAVORITES REPOR	TS RUNNING ARCHIVED	SCHEDULED			
Timesheet	Scheduled Report	ts				
Calendar	STATUS	DESCRIPTION	START AFTER	FINISHED	SUBMIT	TER
Expense Report		•				
Self Service		•	▼ >=	>=		
Approval Center	Waiting	Project List	2/9/2023 04:30 pm		Teresa E	lever
Reporting	Waiting	Pursuit Hit List	2/9/2023 04:45 pm		Billy A	Edit Scheduled Repo
	Recurring	Pursuit Hit List	2/1/2022 04:00 pm		Billy A	Hold Release
Activities	Recurring	r distictife cise	2/1/2022 04:00 pm		Ditty A	Cancel
Boilerplates						Resubmit
BoltHubs						Delete
Business Lines						
Contacts						
Depreciation Processing						
Disposal Processing Employees						
Entities						
Fee Templates						
Firm Types						
Firms						

Improve Collaboration with Teams Integration

- » Make it easier for employees to start a Microsoft Teams chat from Vantagepoint to collaborate and expedite workflows
- Save the extra step and make it easier to quickly interact to ask a question, get clarification or more



Transfer Settings from Preview to Production

- » Key settings can be transferred from one database to another
- » Save valuable time and significantly reduce manual work
- Critical for supporting Vision to Vantagepoint upgrades, but not just for upgrades
- » Example preview to production

		Vantage	epoint 6.0
		• O •	
E Deltek Vantage	epoint >		America
Find Application	Transfer Settings		
Main Menu	Last exported 7/13/2022 04:26 pm by James Hetfield		
IMPORTS & EXPORTS	database.	nt database to another. For example, you can Export settings from a Var	tagepoint preview database and then import those settings into
Planning Data Export Exports Transfer Settings	What Do You Want to Do? C Export Settings from this Database Minport Settings to this Database Settings to be Imported from this Database		
	Security Roles ③	Security Users ④	Screen Designer Field Layouts ①
	Screen Designer Field Security ③	User Defined Components ③	Dashboards ①
	Labels and Lists ③	Saved Searches ①	Saved Reports ④
	User Initiated Workflows ③	Scheduled Workflows ③	Approval Workflows ③
	Provide a Passphrase for the Imported File		
	The Passphrase must be the same as the passphrase that wa	s used to generate the Export file.	
	File Passphrase •		
	Select File		
		hould only be conducted outside of business hours. All active sessions fr en the Import is complete, you will be automatically logged out as well.	
	Import		

Empower Admins to Create a Better User Experience

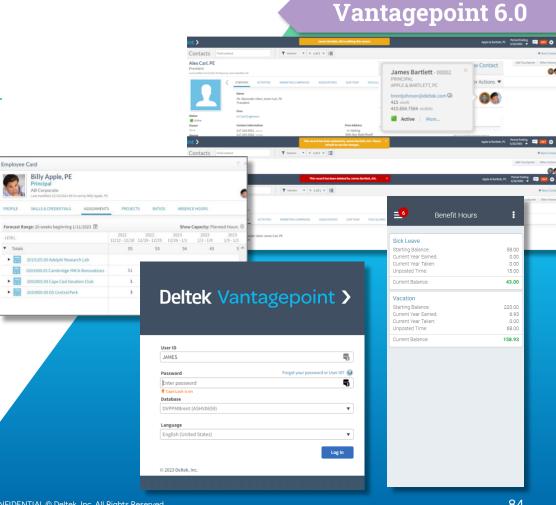
- » More flexibility in screen designer to display up to 5 columns
- » Enhanced security for employee dashparts enables admin more control on data available related to potential sensitive employee information

Vantagepoint 6.0

Deltek Vantagep Find Application	Screen Designer	Contacts		×			PC Period Ending 6/30/2005 ♥
MYSTUFF	Contacts					Save Cancel Add Fi	eld Add Grid Add Ta
Dashboards > Timesheet	SUMMARY PANE	OVERVIEW ACTIVITIES	MARKETING CAMPAIGNS	ASSOCIATIONS OUR TEAM	PLES & LINKS DETAILS	PERSONAL INFORMATION	Find Field Caption
Calendar Expense Report	Status	Name	2	3	4	5	Tab Properties
Self Service	· · · · · ·	1	2	2	4	5	Field Type
Approval Center Reporting	Qualified Status	Firm		¥ Firm Name			Tab
Reporting	Ψ.						Tab Id
HUBS	Status Date	Contact Information	Firm Address	Other Address			overview
Activities	-					-	Caption -
Bollerplates	Status Reason	Other Information					Overview
Contacts Employees					2	b	Display Columns
Firms >	Owner	Market	Website	Rating			5
Marketing Campaigns							A
People	Source	Description					
Projects >							
RESOURCE MANAGEMENT	Project Name						
Resource View							
Project View	Last Activity						
Reporting							
PROPOSALS				Custom Currency Code			
Custom Proposals							
Templates							
BILLING							
Invoice Approvals							
Interactive Billing							
Datab Differe							A David Bulletin Bullet

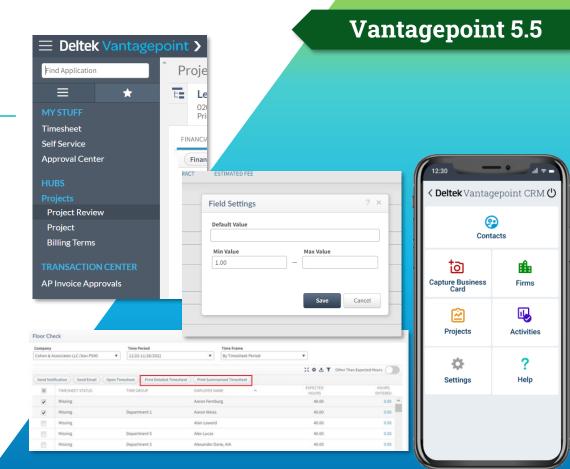
Make Everyday Use **Even Easier**

- Select default list view »
- Concurrent editing notification **>>**
- View benefit hours on Mobile T&E **>>**
- New assignments for employee card **>>**
- Show caps lock warning when logging **>>** in
- And Much More! **>>**



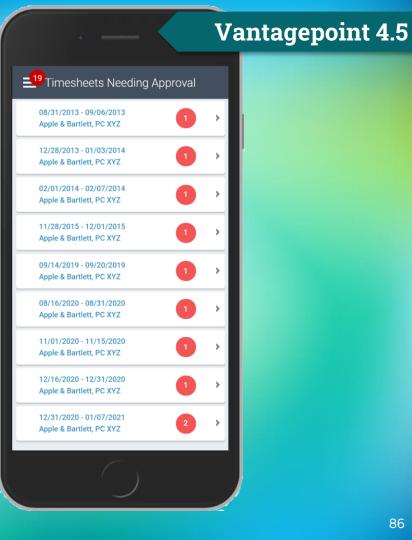
Usability Improvements

- » New menu for Mobile T&E and CRM & navigation improvements for T&E
- » Set navigation menu favorites
- » Print reports from Timesheet floor check
- » Email templates for payment remittance
- » Allow Min/Max & Default Values to be Configured for Standard Numeric Fields via Screen Designer
- » Support Pre-Defined Searches in Advanced Search
- » And Much More!



Usability Enhancements: Mobile

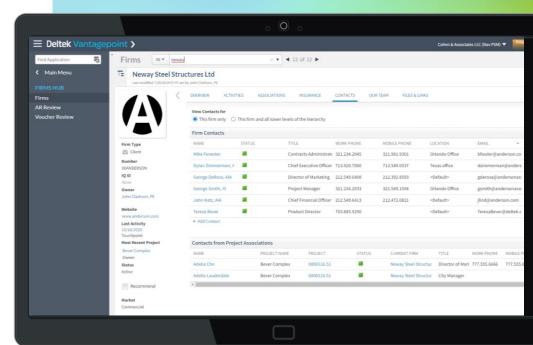
- Edit directly in memo fields **》**
- Auto add expense line **>>**
- » View all timesheets needing approval
- Improved performance for activities **>>**



Usability Enhancements

- Select any firm/contact combination to projects
- » Solves need for multiple firms per contact
- Can associate contact to project with firm other than firm in contact's hub
- » New grid in firms for contacts and project associations

TTo the state of		
Vantagepo	oint	4.5



Usability Enhancements

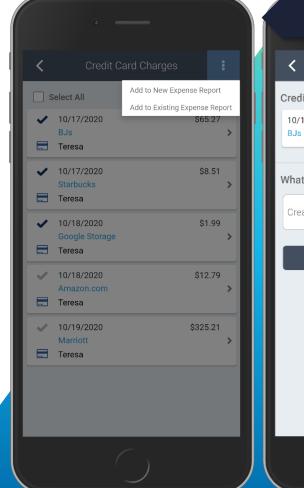
- » Track revisions for draft invoice markups
- » Track billing client on posted AR
- » Simplified editing & change indicators
- Screen designer: require a row in grids; move multiple fields at a time
- » Info bubbles for UDH Records
- » Multi-select dropdowns



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Easily Match Credit Card Expenses

- » Automatically match credit card charges with expense items
- » Available desktop, tablet and mobile
- Close matches result in recommendations for close dates, amounts, etc.
- » Improve credit cards for users
- » Add to existing report or create new



Vantagepoint 4.0 Credit Card Charges Credit Card Charge 10/17/2020 \$65.27 B.Is What would you like to do with this charge? Create new line Next

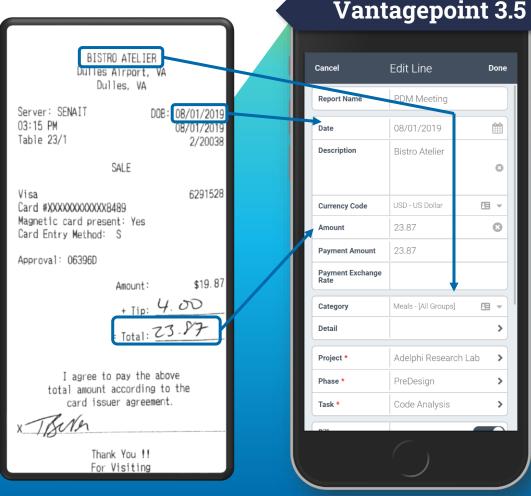
Increased Mobile Security

- » Leverage fingerprint ID or face ID
- » Increase security for Mobile Time & Expense and Mobile CRM
- » Must be enabled on mobile device

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You are now logged in How would you like to sign in to the app in the future?	
Using your face Change to "L	sing face
Using a PIN code	
Continue	

ICR for Expenses

- Simplify expenses and improve accuracy
- » Intelligent Character Recognition
- » Reads text from receipt and populates mobile expense
- » Reads handwriting
- » Leverages machine learning

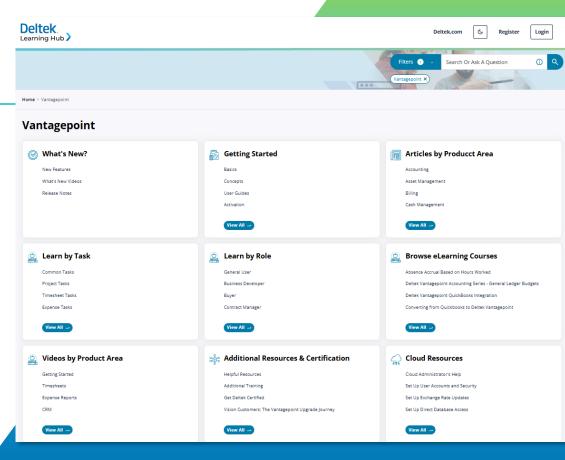


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