

 Viewpoint Vista™ <<< >>> **ProjectSight®**

**ARR Customers
AP Vendors
Phase Formatting**



**Companies
Companies
Budget Code Structure**

All Vista Customers and Vendors are available in ProjectSight to be imported as new companies or linked to existing ProjectSight companies. This creates tight relationship of the customer & vendor data across Vista and ProjectSight, ensuring that records such as Subcontracts and Change Orders are associated with the correct companies.

JC Jobs



Projects

Vista Jobs can be linked to ProjectSight Projects, which initiates the integration of project data. This allows users to create new projects in their preferred system and then link them when ready.

**JC Contracts
Contract Updates**



**Prime Contracts
Contract Updates**

ProjectSight Prime Contracts are automatically created from Vista JC contracts when the JC Job is selected to be synced to ProjectSight.

JC Original Estimates



**Original Budget
Budget Updates &
Transfers**

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Whether your processes are to create Budget Items in ProjectSight first or Job Phases in Vista first, this feature has you covered. The integration ensures the budget is accurately maintained between ProjectSight and Vista so users can confidently work in either system. After the ProjectSight Budget Item is linked to a Vista Job Phase, any direct edits or budget transfers performed in ProjectSight will be reflected in Vista.



Authorized users can send Subcontracts and Purchase Orders from ProjectSight to Vista to keep Job Costs in line and ensure that Accounts Payable is ready for invoices - all without any dual entry. Alternatively, Subcontracts and Purchase Orders can be sent from Vista to ProjectSight. The integration's flexibility allows you to determine in which system commitments are originated, and the system takes care of the rest.



When ProjectSight Potential Change Orders are sent to Vista, a PM Pending Change Order will be created for any pending or approximate changes. Once a change order is approved, Pending PM Change Orders will be removed and a JC Internal Contract Change Order will be created for the approved changes. To complete the financial picture, authorized users can send Prime Contract Change Orders (PCCO) to Vista, which automatically links revenue to the correct JC Contract Item and sets the change order to 'External.' Subcontract Change Orders can also be sent from ProjectSight to Vista by authorized users.



Job Costs from Vista are sent to ProjectSight, where it is separated into Actual and Direct Costs in ProjectSight's Budget and Cost Module.

1- ProjectSight owns the budget once the job is linked. Changes are done in ProjectSight 2 - Commitments can flow either way

Key  = Links matching records  = Syncs changes both ways  = Sends data one way