

Issue to Project

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Introduction

Efficiently managing project resources is crucial for successful outcomes. Whether through material receipts or manual inventory allocations via expense reports, our system simplifies the process. Choose a project, specify materials, and seamlessly issue them, ensuring accurate tracking and timely execution. The default movement date is set for today's transactions, maintaining simplicity in material allocation for your projects.

Business process

In a construction company, the project manager needs to allocate materials for an ongoing project. The team has received a shipment of construction materials. To streamline the process, they utilize the company's inventory system. The project manager selects the project, enters the materials into the system either through a material receipt or an expense report with details like inventory location, product, and quantity. The default movement date is set to today's date, ensuring real-time accuracy. Once approved, the materials are officially issued to the project, updating inventory records instantly. This efficient process enables the team to maintain precise control over resource allocation and project expenses.

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Process - Issue to project

The screenshot shows a software interface for the 'Issue to Project' process. At the top, there's a header bar with 'Home (34)' and 'Issue to Project X'. Below this, a status bar indicates 'Notice : 9, Request : 0, Workflow Activities : 0, Unprocessed Documents : 25'. The main title is 'Issue Material to Project from Receipt or manual Inventory Location'. Below the title, instructions state: 'Select a Project and either - Material Receipt - Expense Report - Inventory Location, Product and Quantity The default Movement Date is today's date.' The form contains several fields: 'Project' (a dropdown menu with a red border), 'Shipment/Receipt' (a text field with an orange arrow icon), 'Expense Report' (a dropdown menu), 'Locator' (a text field with a multi-select icon), 'Project Line' (a dropdown menu), 'Product' (a text field with a multi-select icon), 'Attribute Set Instance' (a text field with a multi-select icon), 'Movement Quantity' (a text field with a '1' and a multi-select icon), 'Movement Date' (a date picker icon), and 'Description' (a text field). At the bottom left, there's a 'Run as Job' checkbox. At the bottom right, there are 'OK' and 'Cancel' buttons. A 'Saved Parameters' section is visible at the bottom left of the form area.

Project : User have to mention the project name here.

Shipment receipts : User have to mention the shipment/receipts in this field.

expense record: user have to mention the expense record

Locator: User have to mention the locator name

project line: user have to mention the project line

Product : user have to mention the product name here.

Attribute set instance: user have to mention the name here.

Movement quantity: User have to mention the quantity here.

Movement date: user have to mention the date here.

Description: user have to mention the description

while the user click on the "ok" button system will generate the transaction as per the above criteria