

Tabs

- Project (Lines/Issues) Header
- Lines
- Issues
- Accounting

Project (Lines/Issues) Header

Home (116) Summary *Project X

Project

Inserted

Client* Konnect Demo Organization* Manufacturing Discrete

Search Key | Sales Representative

Name*

Description

☒ Active ☐ Summary Level

Note

Line Level* Standard Phase

Set Project Type

Project Status Date last action

Contract Date Date Start Schedule Date Finish Schedule

Date Start Finish Date

Home (116) Summary *Project X

Project

Inserted

▼ Reference

Business Partner BPartner (Agent)

Partner Location User/Contact

Payment Term Order Reference

Warehouse Discrete-Main warehouse Campaign

Price List Version Currency*

Activity

▼ Amounts

Planned Amount* Planned Quantity* 0

Planned Margin* Invoice Rule*

Committed Amount* Committed Quantity* 0

▼ History

Invoiced Amount* 0.00 Quantity Invoiced* 0

Project Balance* 0.00

Critical Fields

1. Search key : Used to maintain unique name or code for the product
2. Name : Name of the Project
3. Line Level : Line Level details such as Project, Phase, Task.

4. Currency : Used to select the currency ISO code from the currency master. Indicates the Currency to be used when processing or reporting on this record
 5. Planned Amount : This field is to mention details of planned Amount for the project
 6. Planned Quantity : This field is to mention details of planned Quantity for the project
 7. Planned Margin : This field is to mention details of planned Margin for the project
 8. Invoice Rule : Committed Amount, None, Product Quantity, Time & Material, Time & Material Max Committed.
 9. Committed Amount : This field is to mention details of Committed Amount corresponding to the project.
 10. Committed Quantity : This field is to mention details of Committed Quantity Corresponding to the project.
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Non-Critical Fields

1. Sales Representative: This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
2. Description : To describe specifics or other information related to project
3. Note : Notes to be maintained in relation with project
4. Standard Phase : It's a Drop down to select Standard phase
5. Project Status : Current project status For example Cancelled, Initiated, In Progress, Planning, Post Completion, Suspended
6. Date last action : last date of actions
7. Contract Date : Date of contract
8. Date Start Schedule : Start schedule date
9. Date Finish Schedule Finish Schedule data
10. **Business Partner** : Used to select the business partner from the business partner master.
11. BPartner (Agent) : This field is to maintain BPartner (Agent) details. It is a master data.
12. Partner Location : This field is updated automatically, based on the business partner
13. User/Contact : User/Contact details maintained in Business partner Master
14. Payment Term : The terms of payment(immediate ,30 days, etc
15. Order Reference : Order Reference details if any.
16. **Warehouse**: This field is for Product storage purposes, Select a warehouse where the product is stored.

17. Campaign : This field is to mention campaign details if any campaign carried out for project.
18. Price list version : Price list version for project, For Example Purchase price list, Sales price list etc
19. Activity : Activities executed for project purpose to be selected through drop down and created in activity master.

Lines

Home (116) Summary *Project (Lines/Issues): Pr... Project: Support Assembly M...

Project > Line

Inserted

Client Konnect Demo Organization Manufacturing Discrete

Project Project A_Project A

Project Phase

Project Task

Line 10

☒ Active

Description Optional short description of the record

Product

Planned Price

Planned Quantity

Planned Amount

Planned Margin

☒ Printed

History

Invoiced Amount 0.00 Quantity Invoiced 0

Order

Purchase Order

Project Issue

Manufacturing Order

☐ Processed

Critical Fields : -

1. **Product** : To select the product type an item, you can select the multiple products in this line item
2. **Product Category** : Product Category is auto-fetched from product master.(**Product master**)
3. **Planned Price** : his field is to mention details of planned Price for the project Line Product
4. **Planned Quantity** : This field is to mention details of planned Quantity for the project Line Product
5. **Planned Amount** : This field is to mention details of planned Amount for the project Line Product
6. **Planned Margin** : This field is to mention details of planned Margin for the project Line product


Non-critical Fields :-

1. **Description** :- To Describe any specifics or notes regarding project line.

Issues

Accounting

Home (116)SummaryProject: Project A Project A ✕



Project > Accounting ▾1/1

Client*

Konnect Demo

Project*

Project A_Project A

Client/Tenant for this installation.

Accounting Schema*

Konnect Demo Instance UN/35 Indian Rupee

☒ Active

Organization*

*

Project Asset*

*-123200000-_-_-_-_-

Work In Progress*

*-123100000-_-_-_-_-

This is Auto Updated Tab.