

Tabs

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

Project (Lines/Issues) Header

Home (116) Summary *Project x

Project

Inserted

Client: Kconnect 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

The screenshot shows a software interface for managing project lines. The top navigation bar includes tabs for 'Home (116)', 'Summary', and two active project tabs: '*Project (Lines/Issues): Pr...' and 'Project: Support Assembly M...'. Below the navigation is a toolbar with various icons. The main content area is titled 'Project > Line' and contains several input fields and checkboxes. The 'Inserted' section includes fields for Client (Konnect Demo), Organization (Manufacturing Discrete), Project (Project A_Project A), Project Phase, Project Task, and Line (10). There are checkboxes for 'Active' and 'Printed'. A large text area for 'Description' is present, with a placeholder 'Optional short description of the record'. Below this are fields for Product, Product Category, Planned Price, Planned Quantity, Planned Amount, and Planned Margin. The 'History' section at the bottom shows Invoiced Amount (0.00), Quantity Invoiced (0), Order, Purchase Order, Project Issue, and Manufacturing Order, along with a 'Processed' checkbox.

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) Summary Project: Project A Project A ✕

Project > Accounting ▾ 1/1

Client	Konnect Demo	Organization	*
Project	Project A_Project A <small>Client/Tenant for this installation.</small>	Project Asset	*-123200000-_-_-_-_-
Accounting Schema	Konnect Demo Instance UN/35 Indian Rupee	Work In Progress	*-123100000-_-_-_-_-

Active

This is Auto Updated Tab.