

# Project (Lines/Issues) Header

Home (116) Summary \*Project x

Project  
Inserted

Client\*  Organization\*

Search Key  Sales Representative

Name\*

Description

☒ Active ☐ Summary Level

Note

Line Level\*  Standard Phase

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  Campaign

Price List Version  Currency\*

Activity

▼ Amounts

Planned Amount\*  Planned Quantity\*

Planned Margin\*  Invoice Rule\*

Committed Amount\*  Committed Quantity\*

▼ History

Invoiced Amount\*  Quantity Invoiced\*

Project Balance\*

## 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.
- 

## 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.
-

Updated Mon, Oct 30, 2023 11:15 AM by [Mukund Tulshiram](#)