

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.
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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.
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