

Project

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Introduction

Introduction

Introduction

Tabs

Project Header

Home (116) Summary ***Project**

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**

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.

Project 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 Product Category

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.

Tabs

Project Lines>>Phase Activity


Tabs

Accounting

Home (116)

Summary

Project: Project A Project A ✕



Project > Accounting▼

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.

Process

Process

Project Process

Copy Details

To Copy Lines/Phases/Tasks from other Project

Generate Order

The Generate Order process will generate a new Order document based on the project phase. A price list and warehouse/service point must be defined on the project.

Close Project

To Close project

Generate List

To generate lis

Validation

Validation

Validation

Save

1. System will check all mandatory fields.
-

Delete

1. System will delete the order and its historical details.

Forms and Process

Generate PO From Project

Issue to Project

Home (116) Summary Issue to Project ✕

Issue Material to Project from Receipt or manual Inventory Location
Select a Project and either
- Material Receipt
- Expense Report - Inventory Location, Product and Quantity The default Movement Date is today's date.

Project

Shipment/Receipt

Expense Report

Locator

Project Line

Product

Attribute Set Instance

Movement Quantity

Movement Date

Description

☐ Run as Job

Saved Parameters

OK Cancel

Parameter :-

1. **Project** : Project is to be selected for which user wants to issue material
2. Shipment/Receipt : The project-related shipment/receipt document to be selected.
3. Expense Report : To select Expenses report in-relation with project
4. Locator : Locator to be selected accordingly or it will be auto-fetched
5. Project Line : Project line details for which user wants to issue material
6. **Product** : Product is be selected.
7. Attribute Set instance : Attribute set applied to product is product master is to be selected.
8. Movement Quantity : Quantity required
9. Movement Date : Date of material movement
- 10 .Description : Any specifics or information.

Process :-

This process is used to Issue Material to Project from Receipt or manual Inventory Location